Brief introduction (2 min)
Welcome! Thank you for taking time for this webinar today. I was greatly humbled at the request to give this webinar and hope that you are able to glean a couple of tidbits to help you on your journey. I think it is important to know who you are hearing from, so I want to give you a brief background on myself. I did my undergraduate work in business at the University of Georgia then went to Southwestern Seminary in Fort Worth Texas. This is where I started my career working in higher education. I began in the office of financial aid. During the last semester of my doctoral work I did a directed study in accreditation and assessment to prepare them for their upcoming decennial self-study. This single course is likely what led to my next job as Director of Institutional Assessment at Belhaven University in Jackson Mississippi.

Over the next eight years at Belhaven, I took on additional titles, was appointed as a business faculty member, and grew my sphere of influence. I really think that most of that was the result of my work in institutional research and want to share that with you today. Following my time at Belhaven I was appointed Provost at my present institution (almost three years ago now). I have seen some things work well for me and others that have not, and no two experiences are identical. However, I do think that there are some things that you can do to better prepare yourself for increased influence. I think that there are some things that you can do to help you take charge of your future. You need to engage in personal strategic planning, and we will talk about that. You need to think about how you are perceived, and I will also talk about that during our time today.

Understanding yourself (2 min)
In life there are many things that you are unable to change and ultimately unable to control. I recommend starting by looking at what is within your sphere of control right now. You can control yourself! Start by understanding your strengths. Know your value. What do you do really well? What are you passionate about? How can you play to your strengths? Get some outside perspective on this as well, don't just assume you are doing everything well. Elicit feedback from those that can objectively help.

Next, understand your weaknesses. Everybody has weaknesses; knowing yours will help you determine where you need to improve and how you need to compensate so your weaknesses don't become fatal. If you know your weakness it doesn't have to become an Achilles heel. You may need to work harder in that area to make sure it doesn't hurt you. You need to understand how others perceive you. Taking a critical look at yourself will help you to present yourself most effectively to others.

Once you know yourself well and can objectively think about how you perform and what areas you struggle with, you need to apply that same lens to your job. Are there parts of your job that you may struggle with more than others because of those weaknesses? Do you spend too much time on things that you like, and avoid critical things that are not as enjoyable? These approaches will lead to a negative perception of your job performance. If there are parts of your job that you don't fully understand then spend some time learning about them. This may require a good bit of time, even at home, reading and studying to flesh out your skillset. Learn new ways to do things and apply that to what your job description expresses. Do not try to make your job into what you want your job to be, instead, do your best at the job as it currently exists. The best way to be seen and called upon for greater service is to excel at the job that is before you. Ask questions before you are asked. Answer those questions and propose solutions. Don't just identify a problem, but also present some possible solutions. This will set you up as a person who can help solve bigger problems and expand the scope of work that you are brought in on.

Develop your skillset for the job you have as well as the job you want. We will talk more about this in a minute.

Future goals (3 min)

Be honest with yourself. Where do you want to go and what do you want to do? Do you want to be a senior analyst, director, dean, assistant vice president? Why do you want that role? Is it the pay, prestige, responsibility? Do you feel that your department is stuck based on decisions from current leaders? Be honest with yourself. Are you happy with what you are doing? If so, why do you desire the change? If your sole motivation for the change is compensation then you may be better off switching organizations and negotiating pay on the front end. Rarely will compensation change at your current institution without a change in responsibility.

Are there other things that might make you happy where you are? Are there projects that you might ask to take on that would help you to be happy where you are and would not necessitate a change? Asking these questions will help clear your mind, and help you to understand whether you should stay where you are or whether you should look for something outside of your current situation. In your current situation, are you indispensable? Have you created the need for your organization to keep you? What value are you bringing to the institution? What value do you bring to your department? Do you have value that exceeds your place in the department in which you are currently located? These are questions that you need to ask, because they are questions that your supervisor will ask to determine whether or not they should be giving a promotion or if another vice president sees something in you that they might want you to use in a different role.

You also need to ask what tomorrow might bring. What positions might your organization be looking at creating? What challenges might your organization be facing? There is no better time to prepare for tomorrow than today. You can't wait for the opportunity to arise to begin preparing because somebody else will already be prepared. The opportunities that arise will only come along very rarely so you have to make sure that you are prepared now for what might happen then. Should you determine that you need to get another degree or certification or learn a particular piece of software, you need to be doing that now so that when that opportunity arises you are prepared and ready to respond.

With the rise of the need to have decisions that are informed by data, research is expanding beyond the traditional IR office role. Do aspects of your job tie closely to a non-IR office? Growth for you may be relocating within the institution to better support the research needs within another department. This has happened with growth in online programs, within accreditation demands, and within deans' offices, just to name a few. Additional certification or coursework in other areas may make you more marketable for this lateral transfer if that is what interests you.

If a degree is needed for the position that you want, then waiting for the position to open is not the time to start on that degree. You need to start on the degree now so that you have it completed or nearly completed when the opportunity arises. Individuals that get the position will have already done the work. You cannot wait for an opportunity to open to get started. Begin that process today. Map out your path to completion and any steps needed to get you to your desired goal. Have a strategic plan for yourself.

One of the most valuable classes I took in college had me write my own obituary. The task seemed morbid, but ultimately helped me to frame who I wanted to become and to identify the steps needed to get there. Have someone else talk through your plan with you. Often, it is effective to find someone in the field that has the job you would like to have. Talk to them about their path. Talk to them about what it took and what might help you be effective in that position. This can help to inform your decisions about steps to get there.

Be organized (5 min)
As you seek to be the best at your job I encourage you to be organized. Organization will help with clarity of thought as you will not have to spend much time searching for things. This will also allow you

to be responsive to requests that come to you without the need to expend more effort than is necessary. Nobody needs to redo the same task just because they can't find the report that they already created. Organization is something that others, including your supervisor, will pick up on. Is your office messy, are your reports messy? Be professional in how you conduct yourself even in the organization of your office. The part that is not seen is the organization of electronic materials (i.e. email and files storage).

For starters, I would emphasize that you try to stay as electronic as possible. Paper is easily lost and should be reserved for important items that you reference regularly. Electronic is far more efficient and more easily searched. If you receive something in paper have a work study or secretary scan that (and if you don't have those people then scan it yourself) this will save a lot of time in the future as you look for documents to reference.

When you set up a file structure make sure that you think about everything that might need a home. Make sure that you have a system that is mutually exclusive (as much as is possible) and collectively exhaustive (even if this means having a catch-all folder for things that don't have a home). Be consistent in how you name things. Do you put dates in each of the file names or at least on the file to show when you created it and when you updated it? Time stamping is important especially when you do iterative reporting. Do you have keywords in the name so that you can leverage the windows search capabilities? A few seconds spent thinking about how you might look for the file in the future will save you a lot of time searching and trying to remember how you saved a file later on. Be consistent in filing. This starts with the structure you lay out and the folders that you have established early on. Do you store things by people that send them, by project, by department, or some other means? Make sure that the naming conventions you use for you folders are reflective of how you will be looking for the information later. Sometimes putting a file in two places is necessary (not recommended for every instance). The key is to make sure it is where you will look for it later.

Email is another area that can easily overtake you. Similar to a file structure, you need to start with something that is collectively exhaustive and mutually exclusive. I have about 120 folders in outlook. I take those people that I correspond with most frequently (the president, my deans, other vice presidents) and create folders for them. I then have functional areas like accreditation with subfolders for each accrediting body. These folders make it easy to find what I am looking for later. The use of folders also allows you to apply rules to your email. You don't need to look at every email that comes in. You may need to file some of them so that you can come back to look at them later. Don't waste time on things that you don't need to. If you get an email from a listserv that you don't use then unsubscribe. If they keep coming just file them automatically in the trash. You don't need to spend time every day deleting them. A few seconds spent one day can set up a rule that will remove the distraction on future days which takes away from your productivity more than just the few seconds spent reading and deleting the email. My former provost would regularly come back to me for the same report that I had previously sent him. He knew that I could provide it instantly. This can be frustrating but demonstrates that you are reliable - and organization can help you to establish this reliability.

As you look to maximize your time and to stay focused, you also want to look at how you spend your time. Do you easily get sucked in to the internet? Can you spend an hour before you realize how long you've been browsing? Recognize this and set up safeguards to protect yourself. Use plugins on internet browsers. Stay focused is one that I have used on Chrome. Set an allowable time to have a mental break but don't allow it to dominate you. Social media is another area in which you can easily be consumed if you don't organize yourself with some guardrails to limit the impact.

Be organized and stay focused so that you maximize your time spent on tasks. This will make you better at your job.

Know your context (7 min)

It is important to understand where you are currently. What is unique about your current institution? What is the structure? Who reports to who and what is the hierarchy that exists on paper? This is one aspect of the institution and will be important to know formal relationships. It is also important to understand the power dynamics that exist. Is there really a relationship with a key stakeholder that makes or breaks new initiatives? Is there one VP that has to sign off on endeavors for them to be successful? What answers does that person want to have before they will give their blessing? Not understanding the power structures will often doom things before they start. I have found it essential to befriend as many administrative assistants as possible. If they don't like you then your chances of getting a meeting on short notice is nearly impossible. Respect them and the key role that they play. Help them to be more effective at their jobs and they will return the favor to you when you need it. Get out of your office and talk to them in person.

What are the strengths and weaknesses of your institution? Knowing this can help you as you see problems within the data or problems within the questions that are being asked. Placing your responses within the context of how to improve the institution begins to demonstrate your value to the organization. If your institution is strong in a particular area that may be because that one area is all that is emphasized. This could result in other things that need attention. Being able to demonstrate how data informs what is needed is crucial in overcoming institutional groupthink. I recently read "Finish" a book by Jon Acuff. In this book he talks about hidden rules that guide our actions. Institutions often have these as well. They must be carefully addressed with a thoughtful examination of the data in order to overcome built-in biases.

It is important to know how decisions are made. Who weighs in on those decisions? What information do they want to see? Do certain individuals meet before a big meeting and determine the outcome beforehand? If so, you need to get the data into their hands before they meet. This is not an easy task but is important to make a difference. How long do decisions typically take? If you don't have the critical information to provide at the critical points in that decision-making timeline, then you may miss out on the opportunity to have input into the decision. Much of this will revolve around the budgeting timeline. Once the budget is set you will likely be waiting a year if the data will have a budgetary impact. Oftentimes, key stakeholders have critical individuals they trust. Do you need to speak with them to gain their input? This may be critical to gaining buy-in from the decision maker. I would regularly keep other reports that did not have as much time-sensitivity to them in my binder. When I would meet with the Provost I would have them ready in case a related question came up. Having timely data can speed up decision making and demonstrates your attentiveness to the needs of the institution.

It is also important to understand your profession. Don't rest on your laurels and not continue to grow. Read books and sign up for listservs. See what others are doing in the profession. Participate in organizations like AIR. I started at my state organization in Mississippi (MAIR) and learned more about how to be a professional within institutional research. Learn from your peers and hear the questions that they are asking. You may not need to ask the same questions, but it will help you to learn where you need to probe. What is the field beginning to look at and how can you move with that in a way that helps your institution?

I remember the first time I attended AIR's annual conference, the Forum. I remember being really jealous of the size of the large institutions represented and the degree of specialization that they were able to achieve. I also remember hearing some of their presentations and thinking I can't really do that, but I can do this. Being challenged to try new things and think about things differently is critical. We need to push ourselves in order to grow and to get out of the ruts that we often find ourselves in. Attending webinars like this and reading whitepapers will allow you to see different ways of doing things. You don't have to agree with everything that the speaker says (I certainly don't expect everyone to agree with everything I

say here), but you should be able to take away something that you can look into further or that you can look at differently than before. We should take a look at ourselves with an eye toward continuous improvement.

While you are at these organizations' conferences, make sure to network and find things that others do well. Make connections with those doing jobs similar to yours, but also with those who do things very differently. The diversity of ideas pushes us beyond our comfort zones and allows us to see new ways of doing things. You can find experts that can help you solve problems or give you the jumpstart you need to be able to solve them yourself. Get involved. Serve and build relationships. I am grateful for the many meals eating with organizational leadership that helped me to shape my thinking and to push myself further. This also helped me to expand by ability to exercise the BASE/CASE method (Borrow And Steal Everything/Copy And Steal Everything). Now, I am not telling you to literally steal but there is no need to reinvent the wheel. If you find something that is formatted well, then use that for a report. If a colleague at another institution created a unique report, then ask for a copy. This can help you to not start from scratch and make your time more effective.

Where do you fit? (3 min)
Know where you fit within your institution. You must be trustworthy and a reliable source of information. If you don't know the answer, be honest and forthright. Your integrity is essential in your role. If you cannot be trusted you will be asked to be part of broader discussion and will likely be minimized, even in your current role. Don't sugar coat bad information. Tell it like it is but be attentive to your audience. The manner in which you present the information is critical. Be the calm and stable source of information. I can recall a particular time that I was sitting in my office. I answered an unknown number to hear my president on the phone. He asked me a series of questions. I answered truthfully and accurately. There was then a long pause followed by a thank you and then he hung up. I later found out that I had been on speakerphone with the full cabinet and had just discredited what one VP had argued for - trying to contradict my numbers. I had built a reputation for being trustworthy and that was on the line that day.

When you are able, seek opportunities to provide interpretation. Often times we see the data and make inferences but don't always share that information. We are probably better able to see trends and extrapolate that data to make recommendations because we are not emotionally tied to the data that are represented. Be prepared to offer this insight. Part of this will be demonstrating your ability to solve complex problems. If you see something within the data you may run another report or ask some additional questions that allow you to provide a solution. People that digest our work do not always see what we think is obvious. Make the connections for them. On occasion this may be answering questions that have not been asked yet. You may see something and be curious and look into a situation further. Don't let it stop there if you find something intriguing. Be curious as you approach your job. Answering questions to problems that arise and proposing ideas to people who can act upon them will help to move the institution forward. You will also begin to be seen as a driver of that innovation. It is critical to publish internally. Don't just leave it on your desk. Help other people to be effective at their jobs too.

Communication (3 min)
As you seek to communicate the findings of your research you may need to develop your emotional intelligence. What are people asking that they are not actually saying? What is the question behind the question? Are people afraid of something that they end up avoiding? Be prepared to pick up on these cues when you speak to people and when you give them the results of your research. After you have given your research you need to watch and see what is done with it. How were decisions made as a result? Do you need to be clearer when presenting your findings? Do you need to stress more what you are *not* saying as much as what you *are* saying? Did the results of your research get applied in the way that you saw fit? If not, why not, and can you do something to strengthen that in the future? If they were applied differently

can you see that conclusion from what you provided or do you now see how that decision could be made? Using a metacognitive approach to evaluating what you did will help you to improve how you approach things. Do you have reports that are in color and you have someone viewing them who is colorblind? This can kill your proposal before it even gets started.

Seek opportunity to provide answers to questions and to raise the questions that need to be asked. Recently, I had results provided to me that demonstrated a possible connection to a rise in tuition with a decrease in applicant pool. This has led to more discussion and, while not finalized, may lead to reconsidering the raise in tuition that had been forecast. The data doesn't drive every decision but it informs it in a way that helps to reach a better conclusion.

Timing is essential when you are communicating information. If you miss key deadlines then your report may just be tossed aside. Catching someone on a good day may also mean your report goes further and is read with an eye toward implementation. This is part of why you must have solid relationships with administrative assistants. They can help you know when to present and when not to. I would regularly keep some of my research in my folder and only pull it out when the time was right - not reports that were requested, but some research I conducted on my ow . Being able to provide timely research is essential and may help you to take on more responsibility as you are able to address institutional problems in a timely manner.

Get good information (8 min)
As you seek to improve yourself and to speak with authority in a timely manner it is important to educate yourself. To have good information that informs what you look at, what questions you ask, and what you begin to focus on is essential to be in the right places. Some of those places are regional accrediting body meetings, regional AIR meetings, AIR annual Forum, state Affiliated Organization meetings, Educause, etc. You obviously will not have an unlimited travel budget but many of these organizations will have resources you can access and newsletters that can help you to better understand what you should be looking at and what problems your institution may need to provide answers for. These organizations will also provide avenues for networking that can help you expand your contact base for when unique challenges arise. It is always helpful to have someone that may have looked at a similar problem before to help point you in the right direction. One thirty minute phone call can save you weeks' worth of work if it points you straight to the core of an issue.

Some mailing lists that you can sign up for are DOE title IV listservs that will help you stay abreast of needs within financial aid reporting and HEOA. Regional accreditor listservs may have a lot of questions that are not relevant, but it may be one that you want to sign up for and have a rule set up to send to a folder that you can search later. They are a great resource for matters common to institutions within your region. CHEA has some good information on their listserv that can help you see some national trends. Inside Higher Ed and the Chronicle of Higher Education have several options for subscription that help you see national discussion points and have good archives online that may shed light on particular issues that have arisen at other institutions. They can provide context to questions that arise on your campus. NACUBE and University Business do the same thing with an eye toward the business functions of the organization. You don't have to read these daily but if you subscribe and have a rule to send them to a folder you can reference them and skim them when you have down time or if you need a break to reset your thinking.

Other sources of information to help inform you research might include university memberships. If you are unclear you can often find this information on your institution's IRS Form 990. You may ask various departments what they subscribe to and might find some valuable information that you can use among those groups. Your university may be a member of a research consortium (Hanover, Education Advisory

Board, Eduventures, etc.). These groups may have research briefs that are helpful to provide context for problems that you are trying to solve.

Again, and I know I have said this before, but admin assistants on campuses are invaluable. They can help you know when key meetings are occurring. They can help you find information that you might need. They can help point you in the right direction when you have questions.

Soft Skills (3 min)
You can have the best information and have the perfect solution that the university needs to implement but you may not get off the ground if you have alienated those who could use the information. You need to be approachable. If someone has a question, don't talk down to them. Ask meaningful questions so that you can understand where they are coming from. Listen before you speak, but when you speak be clear and confident. There is a fine line between confidence and arrogance, and it is a line you don't want to cross. When you are assertive you give people confidence to move forward with what you have given them, but when you come across as arrogant none of those people will want to talk to you again. You need to ensure that you are thoroughly prepared for any conversation that you go into. Have your reports ready and snippets of the underlying information. Give evidence of questions you asked that proved fruitless. Let them know that you have done your homework (not by saying so but by showing so).

Always try to see beyond the scope of what you currently see. What questions are being asked a level above you? What do they see that you don't? When you see beyond the box that you live in you are able to answer broader questions. This is what demonstrates upward mobility, and this is what brings you to the forefront of the minds of those looking to promote up or promote out. Don't just bring problems, bring the problems with some proposed solutions. This shows you are part of the solution.

You need to publish and present. Start internally and take it externally. If you have research but don't share it with anyone you have really just wasted your time. If you have research that will benefit a department go and show it to them. Don't just file the report and wait for it to be asked for. Let them know why you were looking into it and see if they would like any further information to make it more useful to them. Refining these internal presentations will allow you to gain confidence in sharing the principles learned from those endeavors with a broader audience. Present those findings at conferences. Start locally and grow from there. You will probably be addressing a problem that someone else has come across and be able to help them to solve the problem. You will be able to speak with expertise. This will increase your ability to do more than what you are currently doing and may turn into a new opportunity down the road.

Timing is everything.

Do your best.

Outwork everyone around you.

Discussion/Q&A (remainder of time)