# I. Ends Monitoring Report – Policy B

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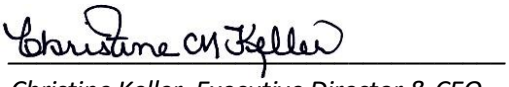
*I certify that the information contained in this report is true.*



*Christine Keller, Executive Director & CEO*

July 25, 2024
*Submitted (date)*

**This report provides updates on the success indicators for Policy B only.** Ends reports are provided quarterly for specific sets of policies (see BRE III and/or the Board Operating Calendar). Previous Ends reports can be found in the Board Teams account - Monitoring Reports - HISTORY

**AIR ENDS**

As a global association, AIR empowers higher education professionals to use data, information, and analytics in ways that are effective, ethical, and equitable. AIR supports data-informed decision making that amplifies student and institutional success.

These must be done within AIR's available resources and in such a manner that the value to higher education is worth the investment of those resources.

A. AIR educates higher education professionals and organizations on the value and role of institutional research and institutional effectiveness.

B. AIR provides opportunities for professionals to develop the knowledge, skills, and abilities necessary to implement and lead data-informed cultures within higher education through:
- Contextualizing data throughout higher education;
- Learning methods and tools of the institutional research and institutional effectiveness profession;
- Sustaining and advancing data literacy;
- Conducting research and scholarship.

C. AIR provides and promotes equitable opportunities for the development of diverse and inclusive professional networks.

## CONTEXTUAL INFORMATION FOR 2024 REPORTING

### Global Policy Language

*As a global association, AIR empowers higher education professionals to use data, information, and analytics in ways that are effective, ethical, and equitable. AIR supports data-informed decision making that amplifies student and institutional success. These must be done within AIR's available resources and in such a manner that the value to higher education is worth the investment of those resources.*

**Interpretation - vision of success (2024)**

AIR works at the intersection of people and data to build the individual and institutional competencies necessary to use data, information, and analytics in ways that are effective, ethical, and equitable.

Therefore, AIR programs, services, and resources are designed to serve the interests of three primary constituencies:

1. *Higher education professionals, especially AIR members*. AIR seeks to educate, elevate, connect, and support professionals who produce, analyze, and use data.
2. *Higher education institutions*. AIR works to build, sustain, and support institutional capacity and capabilities to use data and analytics for better decision making and institutional improvement.
3. *Higher education community*. AIR facilitates the informed use of data and analytics within higher education systems, institutions, and policies through advocacy and partnerships.

Historically, AIR has largely focused on serving individual professionals – "empowering higher education professionals to use data, information, and analytics in ways that are effective, ethical, and equitable." More recently AIR has intensified and expanded its efforts to serve institutions and the broader community through programs such as the Data Literacy Institute (DLI) and the addition of organizational membership. The new Global Ends language codifies these expanded efforts as part of AIR's mission, noting that "AIR supports data-informed decision making that amplifies student and institutional success."

Within the three constituent groups, AIR strives to include diversity of perspectives, approaches, and backgrounds to advance and model the effective, ethical, and equitable use of data, information, and analytics. This includes working with the AIR community to co-create and sustain a welcoming and inclusive association in which individuals find a sense of belonging, connection, and respect.

**Framework for Success Indicators**

The Executive Office has three operational priorities for 2024. The priorities are not intended to encompass all of AIR's programs, events, or activities – many of which are important to the AIR community and AIR's financial viability. However, these priorities are areas of special focus to advance AIR's continued progress, sustainability, and expansion.

1. Grow and retain individual and organizational members.
2. Continue to develop and implement the systems, expertise, and infrastructure necessary to deploy professional services and technical assistance to institutions.
3. Improve internal use of data and technology for decisions, operations, and programming.

The allocation of time, resources, and money allocated to the operational priorities will be considered and balanced with ongoing commitments and activities. In the words of the Ends, "be done within AIR's available resources and in such a manner that the value to higher education is worth the investment of those resources." Specific considerations and commitments that will be balanced include the following.

- The achievement of grant and contract deliverables.
- Delivery of a successful AIR Forum within a changing environment.
- The staff capacity, required expertise, and organizational infrastructure necessary.
- The level and sustainability of projected revenue streams and the size and composition of the audience.
- The value and benefit of the program, resource, or service to the AIR community.

## B. Policy Language

*AIR provides opportunities for professionals to develop the knowledge, skills, and abilities necessary to implement and lead data-informed cultures within higher education through:*

- *Contextualizing data throughout higher education;*
- *Learning methods and tools of the institutional research and institutional effectiveness profession;*
- *Sustaining and advancing data literacy;*
- *Conducting research and scholarship.*

**Interpretation – vision of success**

The learning and professional practice needs of higher education professionals will be supported by AIR through quality programming, resources, and peer networks that help to develop the knowledge, skills, and abilities necessary to implement and lead data-informed cultures within higher education.

AIR will offer an array of professional education and training opportunities for stakeholders at various stages of their careers as described in the subsequent interpretations for Policies B-1 through B-4.

As an essential element of this work, AIR will equip its community members with the knowledge, skills, and abilities to better address issues of equity and ethics when using data, information, and analytics within their roles. Collectively, these learning opportunities will help professionals develop as individuals and leaders within their organizations and the higher education community.

**2023-2024 Policy B Success Indicators**

| 2023-2024 Indicators | Results as of July 2024 |
|---|---|
| 1. Convene the third AIR LEADs (*Leadership with Evidence, Analytics, and Data*) cohort in late summer or early fall of 2024. At the conclusion of the course, at least 75% of the participants will rate the experience as valuable. | The next LEADs course will begin with a virtual kick-off on August 8. The in-person seminar will be in DC, August 22-23. The course is at maximum capacity of 70. |
| 2. Host at least two learning opportunities in 2024 for the AIR community on the ethical and/or equitable use of data and analytics. | *Learning opportunities as of 6/30/2024 that focused on the use of data and analytics to support equity or ethics.*<br>*PDP Workshops*<br>▪ *Using the PDP to Understand Academic Equity*<br>▪ *Using the PDP to Support a Student-Centered Continuous Quality Improvement Plan*<br><br>*2024 AIR Forum Workshops*<br>▪ *How Can Our Work Promote Diversity, Equity, and Inclusion (DEI) on Campus?* |

| 2023-2024 Indicators | Results as of July 2024 |
|---|---|
| | ▪ *Meaningful Metrics: Eliminating Weasel Words to Measure what Matters Most*<br><br>*2024 AIR Forum Impact Session*<br>▪ *Building More Inclusive Systems for Who Counts*<br><br>*eAIR articles*<br>▪ *3/29/24: Diversity and Dynamics in Hispanic Serving Community Colleges: A Comparative Study* |

**Success Indicators (2024-2025)**

1. Host at least two learning opportunities in 2024-2025 for the AIR community on the ethical and/or equitable use of data and analytics.
2. Offer the AIR LEADs course annually with at least 75% of the participants (who complete the evaluation) rating the experience as valuable.[1]

## B-1. Policy Language

*AIR provides opportunities for professionals to develop the knowledge, skills, and abilities necessary to implement and lead data-informed cultures within higher education through…**contextualizing data throughout higher education**.*

**Interpretation – vision of success**

AIR will boost the capabilities of higher education professionals to contextualize data. "Contextualize data" is broadly defined as the ability of individuals to interpret and understand the meaning of data within the surrounding circumstances, settings, influences, and/or information.

AIR's courses and workshops will include learning outcomes that prioritize the acquisition of the knowledge, skills, and abilities necessary for professionals to contextualize data through higher education and at their institutions. AIR will also provide opportunities for our community to learn more about the current higher education environment, such as emerging issues, trends, and policies.

[1] The 75% figure used across the success indicators is consistent with what is considered a "good" Customer Satisfaction Scores (CSAT) across industries, typically between 65% and 80%. The 2024 average CSAT score for "education" is 66%. See https://www.retently.com/blog/customer-satisfaction-score-csat/. The 75% is also based on the professional judgment and experience of AIR staff who consider a 75% satisfied/valued/recommended rating as the floor value for our education, training, or events.

**2023-2024 Policy B-1 Success Indicators**

| 2023-2024 Indicator | Results as of July 2024 |
|---|---|
| 1. Offer two instances of the Holistic Approach to IR course with at least 75% of participants rating the experience as valuable. | *Two instances of the Holistic course were offered during the reporting period – one in Fall 2023 and one in Spring 2024.*<br><br>*Fall 2023*<br>▪ *The cohort included 42 participants. Evaluation data is not available due to a technical issue that has been resolved.*<br><br>*Spring 2024*<br>▪ *The cohort included 33 participants. Of the 14 who responded to the course evaluation, 92% agreed that the course improved their knowledge of institutional research.* |
| 2. Offer the AIR LEADs (*Leadership with Evidence, Analytics, and Data*) course with at least 75% of the participants rating the experience as valuable. | *The 2023 LEADs course began in August 2023 with a cohort of 78 individuals. It consisted of an in-person seminar in DC (August 24-25) supplemented by 5 virtual meetings from September 2023 to January 2024.*<br><br>*91% of the 44 participants responding to seminar evaluation indicated they would recommend LEADs to a colleague.* |
| 3. Offer at least two opportunities for AIR members to learn more about the higher education policy, legislative and/or regulatory environment, and the potential implications for their work. | *Since July 2023, several policy-related learning opportunities have been hosted or co-hosted by AIR.*<br>▪ 11/2023 webinar – *Federal Education Policy Updates & Discussion*<br>▪ 2/2024 webinar - *Financial Value Transparency and Gainful Employment Regulation: Overview of Reporting Requirements*<br>▪ 3/2024 webinar - *Preparing for Reporting Requirements – U.S. Department of Education*<br>▪ 3/2024 webinar - *Education Data in Federal Policy Update*<br>▪ 2024 Forum Impact Session - *Education Data in Federal Policy Update*<br>▪ 2024 Forum Session - *Federal Regulation Reporting (Part 1): Updates on Requirements including FVT/GE*<br>▪ 2024 Forum Session - *Federal Regulation Reporting (Part 2): Tips and Strategies for FVT/GE Reporting* |

| 2023-2024 Indicator | Results as of July 2024 |
|---|---|
| | *AIR is also hosting a Financial Value Transparency and Gainful Employment Regulation resource page - https://www.airweb.org/fvt* |

**Success Indicators (2024-2025)**

1. Offer two instances of the Holistic Approach to IR course annually with at least 75% of participants rating the experience as valuable.
2. Offer the AIR LEADs course annually with at least 75% of the participants (who complete the evaluation) rating the experience as valuable.
3. Offer at least two opportunities for AIR members annually to learn more about the higher education policy, legislative and/or regulatory environment, and the potential implications for their work.

## B-2. Policy Language

*AIR provides opportunities for professionals to develop the knowledge, skills, and abilities necessary to implement and lead data-informed cultures within higher education through …**learning methods and tools of the institutional research and institutional effectiveness profession.***

**Interpretation – vision of success**

The "methods and tools of the IR and IE profession" is defined as the "knowledge, skills, and abilities necessary for the effective, ethical, and equitable production, use, and communication of data and analyses for decision-making."

While the methods and tools of "institutional research" and "institutional effectiveness" are often dependent on the local institutional context, IR typically includes a greater emphasis on conducting student success research and compliance reporting while IE typically includes a greater emphasis on assessment, accreditation, and planning.

AIR will provide a diverse set of opportunities and resources for professionals to learn and apply the methods and tools of the IR and IE profession. These opportunities and resources will include an in-person conference (the AIR Forum) and other in-person training; online courses, workshops, and webinars; publications and newsletters; and surveys and research. AIR will also provide the training and education necessary for compliance with IPEDS reporting requirements and IPEDS data use. The training is offered free of charge to the higher education community and is funded through a subcontract with the U.S. Department of Education's National Center for Education Statistics (NCES).

With the addition of "institutional effectiveness" to this policy, AIR will investigate ways to augment its programming and resources with the methods and tools typically associated with the IE profession.

**2023-2024 Policy B-2 Success Indicators**

| 2023-2024 Indicator | Results as of July 2024 |
|---|---|
| 1. Offer two instances of the Holistic Approach to IR course, with at least 75% of participants rating the experience as valuable. | *Two instances of the Holistic course were offered during the reporting period – one in Fall 2023 and one in Spring 2024.*<br>*Fall 2023*<br>▪ *The cohort included 42 participants. Evaluation data is not available due to a technical issue that has been resolved.*<br>*Spring 2024*<br>▪ *The cohort included 33 participants. Of the 14 who responded to the course evaluation, 92% agreed that the course improved their knowledge of institutional research.* |
| 2. Offer the Foundations Workshop series twice, with at least 75% of participants rating the experience as valuable. | ▪ *The Foundations workshop series is offered in Q2 and Q3 each year. The registration totals for 2023 Q3 and 2024 Q2 were 61 and 43, respectively, for the 5-part series.*<br>▪ *Across all the Foundations workshops offered during the reporting period, 84% of the respondents (N=51) to the post-workshop evaluation would recommend a Foundations workshop to a colleague.*<br>▪ *A day and a half "IR Foundations Bootcamp" was also offered at the 2024 Forum with 26 participants. Of the 11 participants responding to the evaluation 92% would recommend the bootcamp to a colleague.* |
| 3. Offer a high-quality experience for participants at the 2024 AIR Forum in Denver, with attention to rebuilding attendance and mitigating financial risk. The attendance goal for 2024 is 1,555 with at least 80% rating the experience as valuable. | The 2024 AIR Forum was successfully convened in Denver on May 28-31. 93% of participants who completed the conference evaluation (35%) would recommend the Forum to a colleague. This is consistent with the responses from other in-person Forums - 2015-2019 and 2022.<br><br>The total attendance of 1,648 was above the target attendance of 1,555. The paid registrations of 1,501 also exceeded the target of 1,323. The final financial analysis is not yet complete, but no attrition penalties were paid, and sponsorship revenue was near an all-time high. |

| 2023-2024 Indicator | Results as of July 2024 |
|---|---|
| 4. Conduct 50 IPEDS workshops during the 2023-2024 contract period with a total of 1,000 or more participants, 80% of whom will rate the workshops as valuable. | ***Preliminary data*** *for the 2023-2024 IPEDS contract period indicate a total of 61 IPEDS workshops (virtual and in-person) with 1,454 participants. The 2023-2024 evaluation data results are being compiled and are not yet available.*<br><br>*The AIR website provides more information on IPEDS Training options offered free of charge to the community.* |
| 5. Offer a new IPEDS tools workshop at least twice by the end of the 2023-2024 contract period with at least 75% of the participants rating the workshop as valuable. | *The IPEDS Tools workshop was offered 8 times during the 2023-2024 contract cycle.*<br>1. *SAIR – October 14, 2023*<br>2. *AIRO – November 13, 2023*<br>3. *CAIR – November 15, 2023*<br>4. *INAIR - March 21, 2024*<br>5. *TAIR – March 26, 2024*<br>6. *Iowa CC AIR – May 2, 2024*<br>7. *2024 AIR Forum – May 27, 2024*<br>8. *SUNY AIRPO - June 10, 2024*<br><br>The 2023-2024 evaluation data results are being compiled and are not yet available.<br><br>*The AIR website provides more information on PDP Training options offered free of charge to the community.* |
| 6. Offer at least 12 PDP (Postsecondary Data Partnership) workshops in 2024 with a total of 500 or more participants, 75% of whom will rate the workshop as valuable. | *As of 7/17/2024, 17 PDP workshops have been offered with a total of 722 individuals attending.*<br><br>*Of those responding to the post-workshop surveys across all the 2024 PDP workshops, 84% indicated they would recommend the workshop to a colleague. (Response rate = 23%)* |
| 7. Plan and develop a new Foundations Workshop on learning outcomes assessment to deliver in 2025 | *No updates to report at this time.* |

**Success Indicators (2024-2025)**

1. Conduct 50 IPEDS workshops during the 2024-2025 contract period with a total of 1,000 or more participants. 80% of the participants (who complete the evaluation) will rate the workshops as valuable.
2. Offer a high-quality experience for participants at the 2025 AIR Forum in Orlando, with attention to offering an inclusive environment for all attendees. The attendance goal for 2025 is not yet established.
3. Offer two instances of the Holistic Approach to IR course, with at least 75% of participants rating the experience as valuable.
4. Offer the Foundations Workshop series twice, with at least 75% of participants (who complete the evaluation) rating the experience as valuable.
5. Offer at least 12 PDP workshops before 6/30/2025 with a total of 500 or more participants, 75% of whom will rate the workshop as valuable.
6. Plan and develop a new Foundations Workshop to deliver in 2025.
7. Conduct the fourth administration of the AIR National Survey of IR Offices in late 2024 and begin to distribute the findings to the community in 2025.

## B-3. Policy Language (NEW)

*AIR provides opportunities for professionals to develop the knowledge, skills, and abilities necessary to implement and lead data-informed cultures within higher education through …**sustaining and advancing data literacy**.*

**Interpretation – vision of success**

The ability to implement and lead a data-informed culture within a higher education institution depends in large part on the collective efforts of its faculty and staff. AIR will provide opportunities for professionals to improve the knowledge, skills, habits, and mindsets necessary for sustaining and advancing data literacy.

**2023-2024 Policy B-1 Success Indicators**

| 2023-2024 Indicator | Results as of July 2024 |
|---|---|
| 1. Deliver the Data Literacy Institute (DLI) to a cross-functional cohort of higher education professionals during 2024, with at least 75% of the participants reporting improvement in their data literacy skills. | *The DLI is being (or will be) delivered at two institutions during 2024.*<br>▪ *Community College of Aurora from June 26 to October 2 with 21 participants*<br>▪ *Ball State University from August 28 to December 11 with 30 participants* |

| 2023-2024 Indicator | Results as of July 2024 |
|---|---|
| 2. AIR will facilitate a workshop, conference session, or other type of presentation on the knowledge, skills, habits, and mindsets necessary to advance data literacy. | *Two educational opportunities were facilitated during the reporting period on data literacy related topics.*<br>▪ *September 2023 webinar – "Data Literacy in Practice: Oakland University"*<br>▪ *2024 Forum presentation – "Empower Student Success using AIR's Data Literacy Institute"* |
| 3. During 2024, AIR will administer a member survey that assesses the degree to which institutions are providing data literacy training to their employees. The results will be summarized and released to the AIR community. | *AIR revised its plans for a member survey on data literacy and instead conducted two member surveys in early 2024 on alternative topics: artificial intelligence and the reporting requirements mandated by the financial value transparency and gainful employment regulations. Both topics were timelier and of significant interest to our members.*<br><br>*As the AIR National Survey of IR Offices is already scheduled for the fall, plans for a data literacy survey have shifted to 2025.* |

**Success Indicators (2024-2025)**

1. Deliver the Data Literacy Institute (DLI) to a cross-functional cohort of higher education professionals during 2024 and 2025, with at least 75% of the participants (who complete the evaluation) reporting improvement in their data literacy skills.
2. AIR will facilitate a workshop, conference session, or other type of presentation on the knowledge, skills, habits, and mindsets necessary to advance data literacy.
3. During 2025, AIR will administer a member survey that assesses the degree to which institutions are providing data literacy training to their employees. The results will be summarized and released to the AIR community.

## B-4. Policy Language

*AIR provides opportunities for professionals to develop the knowledge, skills, and abilities necessary to implement and lead data-informed cultures within higher education through …**conducting research and scholarship**.*

**Interpretation – vision of success**

AIR will provide opportunities for higher education professionals to learn the knowledge, skills, and abilities to practice research, including both quantitative and qualitative methodologies, through a variety of mechanisms, which may include webinars, courses, Forum workshops, the Data Literacy Institute, and the NCES Data Institute. AIR will also offer opportunities for stakeholders to disseminate

their original research and effective practices through eAIR, *AIR Professional File*, webinars, and Forum presentations.

**2023-2024 Policy B-4 Success Indicators**

| 2023-2024 Indicator | Results as of July 2024 |
|---|---|
| 1. Incorporate content on research methodologies and/or methods into professional education offerings, attending to feedback from stakeholders on specific topics or areas of interest. | *Examples of professional education offerings in 2024 designed to increase research knowledge, skills, and abilities:*<br><br>*Webinars*<br>▪ *February 2024: Navigating Machine Learning and Generative AI: A Practical Approach for IR/IE Professionals*<br>▪ *March to May 2024: Generative AI in Higher Ed: Tips and Tricks from IR/IE Professionals Parts 1-4*<br><br>*Foundations Workshops (courses offered 2 times between July 2023 and June 2024)*<br>▪ *Research Design*<br>▪ *Survey Design*<br>▪ *Descriptive Statistics*<br><br>*Forum Workshops (May 2024)*<br>▪ *Imputation Methods for Nonresponse in Surveys*<br>▪ *Assessing and Improving Your Institution's Data Culture*<br>▪ *How to Build an Analytical Workflow for Program Assessment*<br>▪ *The Art and Science of Enrollment Forecasting*<br>▪ *Introduction to Statistical Models for Institutional Research*<br>▪ *Rankings Unveiled: Modeling College Ranking Data to Inform Stakeholders*<br>▪ *IR Bootcamp: Foundation for any IR Professional*<br><br>*NCES Data Institute (part of IPEDS contract)*<br>▪ *The 2024 Institute successfully convened 29 participants in DC, June 25-27.*<br>▪ *Applications for the 2025 Institute will open in fall 2024.* |
| 2. Publish original research and effective practices from the field in AIR Professional File at least twice in 2023-2024. | *Two new issues of the AIR Professional File were published - Fall 2023 and Spring 2024.* |

| 2023-2024 Indicator | Results as of July 2024 |
|---|---|
| | *A special issue "Building More Inclusive Systems for Who Counts" with guest editor: Elizabeth Jach will be released in late Summer 2024.* |
| 3. Provide opportunities for NCES Data Institute participants to publish and/or present the results of their group research papers. | *Research results from the NCES Data Institute participants were shared with the larger community in two different ways during the reporting period.*<br>▪ *The AIR Professional File, Spring 2024, Article 165: In Search of Institutional Servingness: Institutional Characteristics and Outcomes of Minority-Serving Institutions*<br>▪ *2024 AIR Forum presentation (Friday, 5/31 @ 8a): 2023 NCES Data Institute Research Reports* |
| 4. Deliver the Data Literacy Institute (DLI) to a cross-functional cohort of higher education professionals during 2024, with at least 75% of the participants reporting improvement in their data literacy skills. | *The DLI is being (or will be) delivered at two institutions during 2024.*<br>▪ *Community College of Aurora from June 26 to October 2 with 21 participants*<br>▪ *Ball State University from August 28 to December 11 with 30 participants* |

**Success Indicators (2024-2025)**

1. Incorporate content on research methodologies and/or methods into professional education offerings, attending to feedback from stakeholders on specific topics or areas of interest.
2. Publish original research and effective practices from the field in AIR Professional File at least twice in 2024-2025.
3. Provide opportunities for NCES Data Institute participants to publish and/or present the results of their group research papers.
4. Deliver the Data Literacy Institute (DLI) to a cross-functional cohort of higher education professionals during 2024 and in 2025, with at least 75% of the participants (who complete the evaluation) reporting improvement in their data literacy skills.