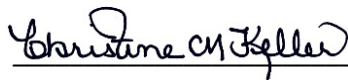


# I. Ends Monitoring Report

## April 2023 Report on Policy A (pg. 4)

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



*Christine Keller, Executive Director & CEO*

April 28, 2023

*Submitted (date)*

### **Global Policy Language**

*AIR is a global association of higher education professionals. AIR exists to empower those individuals at all levels to use data, analytics, information, and evidence to make decisions that are effective, ethical, and equitable and take actions that benefit all students and institutions and improve higher education. This 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 – four-year vision of success**

The overall vision of success for AIR over the next four years is to increase the number and diversity of higher education professionals served by the association through high quality products, resources, and services. The collective purpose of these products, resources, and services (new and existing) will be to advance the use of data and analytics to make effective, ethical, and equitable decisions for the benefit of students and institutions. Success includes rebalancing the AIR business model so that revenue from AIR's paid products and services are sufficient to sustain the programming and contribute to the long-term viability of the association.

### Context

AIR is emerging from a period of survival and recovery after the substantial financial and societal impacts of the pandemic on the association, higher education institutions, our stakeholders, and the world at large. A new equilibrium and external environment have emerged, and planning for the future must adapt and be responsive to these new realities.

Immediate challenges facing AIR include historically low attendance at the Forum, stagnant participation rates in some educational programming, and lower membership numbers. Individuals within the AIR community are facing their own challenges with staffing shortages, increased workloads, reduced time/capacity, more restrictive policies, and financial constraints. The challenges faced by AIR stakeholders affect how and when AIR engages with them – from the assessment of needs to the development and delivery of appropriate and responsive professional development, resources, and support.

AIR is well-positioned to capitalize on several opportunities, including the renewal of the IPEDS education and training contract, a grant to develop and deliver training for the Postsecondary Data

Partnership, a grant to work jointly with other associations to advance the effective/ethical use of analytics, and a grant to develop and deliver products and services to institutions that are committed to using data for equitable student success. These opportunities offer the potential for AIR to expand its customer base by engaging a wider audience of IR, IE, and higher educational professionals as well as to provide products and services directly to institutions to increase the data literacy/use of their staff and faculty.

Commensurate with the experience of AIR community members, the association is faced with its own financial and human capital constraints. Continued attention must be given to staff capacity and engagement, the necessary support infrastructure, and the long-term financial viability of activities – i.e., the value provided exceeds the cost in time, people, and money. In short, some programming is not paying for itself. Thus, the following criteria remain central in decisions about the investment of operational resources in new or continuing programs, products, and services:

- The level and sustainability of projected revenue streams.
- The potential value and benefit to stakeholders, including the size and composition of the target audience and informed by input from members, stakeholders, or partners.
- The opportunity for expanding into new markets and/or serving new stakeholders with unmet needs.
- The operational resources available or required – e.g., staff capacity and expertise, technical infrastructure, business processes, and communication reach/effectiveness.

### **Framework for Success Indicators**

The success indicators within the report represent activities that support the achievement of the specific Ends policies. Collectively, they also align with the following priorities and pathways, which support the achievement of the Global Ends and association mission. Ethics and equity are central tenets within this work.

#### Ongoing Priorities

- Achieve contract and grant deliverables.
- Meet the needs of current stakeholders through programs, resources, and services.
- Attend to staff capacity, required expertise, and organizational infrastructure to support current and new programming.

Emerging Pathways

- Implement the organizational membership option to expand the number of stakeholders, increase utilization of products and services, and raise the visibility of AIR within the higher education community.
- Partner with higher education institutions and organizations to deliver products and services to their faculty and staff.
- Inventory and evaluate existing programming and activities for value to the community and financial viability, and make decisions about their continuation or modifications.

**January 2022-December 2022: Global Success Indicators**

| 2021-22 Indicator   | Results as of January 2023   |
|---|--|
| <p>1. Feedback from a majority of stakeholders will show that AIR programs, resources, and services meet their needs.</p> | <p>Results from the 2022 Stakeholder Survey.</p> <ul style="list-style-type: none"> <li>• 90% of respondents who were familiar with AIR would recommend AIR’s programs, resources, and services to a colleague. (4% were “not familiar” and not included in the calculation.)</li> <li>• 77% of respondents who were familiar with AIR rated the overall value of AIR’s programs, resources, and services as “very good” or “excellent.” Another 19% rated the value as “good.” (5% were “not familiar” and not included in the calculation.)</li> </ul> <p><i>The response rate for the 2022 Stakeholder Survey was 5% - 541 responses out of 11,695 attempted - and results are interpreted with appropriate caution. The results are consistent with satisfaction levels of participants in AIR programming, which are regularly above 75%.</i></p> |
| <p>2. The membership target for 2022 is 3,000 individual members by December 31, 2022.</p>                                | <p>The total number of AIR members as of 12/31/2022 was 2,272. While a slight increase over the member count of 2,252 at the end of 2021, it is short of the target.</p> <p>Two takeaways from the results:</p> <ul style="list-style-type: none"> <li>• A growth target of 3,000 members is not realistic given the current environment and resource constraints; more realistic growth targets should be set and achieved.</li> <li>• Although membership renewals rates have remained steady, increased attention will be given to the recruitment of new members and re-engaging “recent members” who have lapsed.</li> </ul>  |

### Success Indicators for 2023

1. Implementation of the organizational membership option with a public launch date of January 2024. A successful implementation includes the recruitment of at least 10 organizations/institutions to serve as early adopters and pilot testers before the public launch.
2. The membership target for 2023 is 2,500 individual members by December 31, 2023. The focus will be on outreach and recruitment of new members.
3. Market three existing suites of products (Data Literacy Institute, Holistic Approach to IR, and the Foundations courses, all with successful track records) to institutions within the Gates ecosystem and build internal and external capacity to support anticipated demand.

### UPDATES FOR APRIL 2023

#### A. Policy Language

*AIR educates institutional researchers, higher education leaders and professionals, and organizations on the value of institutional research.*

#### Interpretation – vision of success

The “value of institutional research” is broadly defined as recognition of the role of institutional research and effectiveness in the effective, ethical, and equitable use of data to make decisions that benefit higher education institutions and students. As this is a large, multi-layered, and complex endeavor and the resources and reach of AIR are not unlimited, priority will be given to achieving the following:

- Development and distribution of programming, tools, and/or resources that demonstrate the impact of institutional research/effectiveness in effective, ethical, and equitable data-informed decision making.
- Establishing and strengthening partnerships and programming that incentivize higher education institutions and organizations to engage AIR and its stakeholders as key allies in increasing IR/IE/data capacity, data literacy, and data-informed decision making.

#### 2022-23 Policy A Success Indicators

| 2022-23 Indicator  | Results as of April 2023   |
|--|--|
| 1. Release and promote a series of <a href="#">data briefs</a> on the results of the 2021 National Study of IR Offices beginning in the summer of 2022, with the final briefs scheduled for release by April 2023. | <p>Five brief have been published.</p> <ol style="list-style-type: none"> <li>1. <a href="#">Staff Roles, FTE, and Characteristics</a></li> <li>2. <a href="#">Full-time Staff Salaries</a></li> <li>3. <a href="#">Staff Job Functions and Salary Expenditures</a></li> <li>4. <a href="#">Leadership and Management</a></li> <li>5. <a href="#">Executive Leadership for the Data and Analytics Function</a></li> </ol> <p>Four additional briefs will be published in 2023. (The final titles may vary slightly.)</p> <ol style="list-style-type: none"> <li>6. <a href="#">IR Work Functions</a></li> <li>7. <a href="#">Reporting Relationships</a></li> <li>8. <a href="#">Professional Development</a></li> <li>9. <a href="#">Data Capacity, Literacy, Maturity</a></li> </ol> |

| 2022-23 Indicator  | Results as of April 2023  |
|--|---|
| <p>2. In partnership with NACUBO and Educause, AIR will work with subject matter experts from the respective professional communities in 2023 to develop an “analytics guide” that outlines the typical steps and sequences necessary for institutions to fully leverage capacity development centered on analytics and strategic data use. The work is funded by the Gates Foundation and the delivery date for the guide is April of 2024. The work builds on the “<a href="#">joint statement of analytics</a>” and is funded through the Gates Foundation.</p> | <ul style="list-style-type: none"> <li>• AIR, EDUCAUSE, and NACUBO kicked off the next stage of the joint analytics work in late February with a convening of seven institutional teams comprised of the chief IR, chief IT, and chief business officers: Arcadia University, Elgin Community College, Jackson State University, Mercy College, University of Central Florida, University of Maryland Baltimore County, and University of North Texas.</li> <li>• Additional engagement with association members and institutions will take place virtually and at the three associations’ 2023 conferences.</li> </ul> |
| <p>3. Complete the development of a readiness framework with the support of a grant from the Gates Foundation for transforming institutional data functions.</p>   | <ul style="list-style-type: none"> <li>• A report entitled <i>Data Capacity in the Ecosystem: The Association for Institutional Research (AIR) Model</i> was delivered to the Gates Foundation in October 2022. This work informs AIR’s continued contributions in the Gates ecosystem as the data capacity partner that supports institutions and their students through a wide variety of organizations and networks, including other higher education organizations (e.g., AACSB, UNCF).</li> </ul>  |

### Success Indicators for 2023-2024

1. Release the final four [data briefs](#) using the results of the 2021 National Study of IR Offices
2. Continue partnership work with NACUBO, EDUCAUSE, and subject matter experts from the respective professional communities and higher education overall on the creation of a dynamic guide that operationalizes the *Joint Statement on Analytics*. The work is funded by the Gates Foundation and the delivery date for the guide is April of 2024.
3. Deliver the Data Literacy Institute (DLI) to a cross-functional cohort of higher education professionals from at least one institution twice per year (fall and spring) beginning in fall of 2023.

## B. Policy Language

*AIR empowers and supports higher education professionals in ...*

- *Contextualizing data across campus and throughout higher education.*
- *Learning methods and tools of the institutional research profession.*
- *Evaluating the effectiveness of institutions.*
- *Conducting research and scholarship.*

### Interpretation – vision of success

The learning and professional practice needs of higher education professionals will be supported by AIR through high-quality programming and resources that help to advance data-informed decision making that is effective, ethical, and equitable. AIR offers a broad array of professional education opportunities for stakeholders at various stages of their careers as described in the subsequent interpretations for Policies B-1 through B-4. Professional education opportunities added within the last two years are the Data Literacy Institute (DLI) in fall 2021 and the Leadership with Evidence, Analytics, and Data (LEADs) course in fall 2022.

As an essential element of this work, AIR will equip its stakeholders to better address issues of equity and ethics when using data, information, and analytics within their roles at higher education institutions. For example, the effective, ethical, and equitable use of data in decision-making is incorporated with AIR's courses, research, statements, and publications – A Holistic Approach to IR course, Leadership with Evidence, Analytics, and Data (LEADs) course, the *Statement of Aspirational Practice for IR*, the *Statement of Ethical Principles*, and the *Statement on Racial Injustice*.

### 2021-22 Policy B Success Indicators

| 2021-22 Indicators  | Results as of July 2022   |
|---|---|
| 1. The creation and validation of a professional education roadmap for building a robust IR/data function by the end of 2022. | <i>Rather than an educational roadmap as originally planned, AIR determined that a more immediate positive impact on the profession is to provide leadership professional development. A new course</i> |
| 2. The planning and development of at least two education offerings from the roadmap by the end of 2022.                      | <i>AIR LEADs: Leadership with Evidence, Analytics, and Data, was planned during the reporting period and will</i>   |
| 3. Delivery of at least two education offerings from the roadmap by the first quarter of 2023.                                | <i>launch in August 2022. The preliminary work toward a professional education roadmap will be saved for a time with less resource constraints.</i>   |

### Success Indicators for July 2022-July 2023 (updated January 2023, progress report in July 2023)

1. The inaugural AIR LEADs course will launch in August 2022, with at least 75% of participants rating the experience as valuable.
2. Deliver the Data Literacy Institute in partnership with APLU in Fall 2022 and Spring 2023, with at least 75% of participants rating the experience as valuable.

3. Host at least two learning opportunities for the AIR community on the use of data and analytics to support equity or ethics.
4. NEW: The second offering of the AIR LEADs course will begin in August or September 2023. At the conclusion of the course, at least 75% of the participants will rate the experience as valuable.
5. NEW: Deliver the Data Literacy Institute (DLI) to at least one institutional cohort of higher education professionals twice a year (fall and spring) beginning in fall of 2023. At the conclusion of the DLI, at least 75% of the participants will rate the experience as valuable.

### B-1. Policy Language

*AIR empowers and supports higher education professionals in ... contextualizing data across campus and 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. It is the top tier of institutional intelligence as described by Patrick Terenzini (2013) – “the ability to synthesize a deep knowledge of higher education in general and of a particular institution.”<sup>1</sup>

The contextualization of data is an important learning outcome of AIR’s flagship courses – i.e., *A Holistic Approach to IR and Leadership with Evidence, Analytics, and Data*. Contextualization of data is a key area of emphasis in AIR’s research and publications – i.e., *Duties and Functions of Institutional Research*, the *Statement of Aspirational Practice for IR*, and the *Statement of Ethical Principles*. Further, the Data Literacy Institute expands learning and practice on the importance of data contextualization to a broader set of higher education professionals across functional areas.

#### 2021-22 Policy B-1 Success Indicators

| 2021-22 Indicator   | Results as of July 2022   |
|---|---|
| 1. Offer the Holistic Approach to IR course at least twice annually, increasing year-to-year participation. | <p><i>Three cohorts of students completed the Holistic course during the reporting period. The total number of students increased by 29% over the previous reporting period.</i></p> <ul style="list-style-type: none"> <li>• <i>Fall 2021 – 36 participants</i></li> <li>• <i>Spring 2022 – 31 participants</i></li> <li>• <i>Spring 2022 – a special cohort of 30 participants from Tribal Colleges was convened</i></li> </ul> |

<sup>1</sup> Terenzini, P.T. “On the Nature of Institutional Research” Revisited: *Plus ça Change... ?*. *Res High Educ* 54, 137–148 (2013). <https://doi.org/10.1007/s11162-012-9274-3>.

| 2021-22 Indicator   | Results as of July 2022  |
|---|--|
|   | <p><i>through funding from the Gates Foundation in collaboration with AIHEC.</i></p>   |
| <p>2. Continue to offer the Foundations workshop series as planned through the end of 2021. Success indicators for 2022, including registration targets, will be established later in 2021 based on lessons learned from the preceding eight months.</p>  | <p><i>The Foundations Workshop series was moved to a quarterly schedule in 2022, with a target of 75 students each quarter across all five workshops.</i></p> <ul style="list-style-type: none"> <li>▪ <i>Enrollment for Q1 2022 was below expectations with 33 students.</i></li> <li>▪ <i>Enrollment for Q2 2022 was just below the target with 74 students.</i></li> <li>▪ <i>Satisfaction among participants was high, with over 90% indicating they would recommend the workshop to a colleague.</i></li> </ul>   |
| <p>3. Host at least two learning opportunities for the AIR community on the use of data and analytics to support justice, equity, diversity and/or inclusion. [For 2022-23, this success indicator was moved to the highest level of Policy B as it encompasses more than the “contextualization of data.”]</p> | <p><i>AIR provided the following learning opportunities and resources on the intersection of data/analytics and equity/justice.</i></p> <p><i>eAIR in November 2021 focused on the ethical and just use of data.</i></p> <p><i>2022 Forum Workshops (registered=29)</i></p> <ul style="list-style-type: none"> <li>▪ <i>Learning to lead: Equity-Centered Collaboration for Success</i></li> <li>▪ <i>Ethics in the IR Office</i></li> <li>▪ <i>Improving Equity, Inclusion, and Socially Just Assessment Practices</i></li> </ul> <p><i>Webinars (registered=69)</i></p> <ul style="list-style-type: none"> <li>▪ <i>5/10/22 - Practical Steps to Start a Broad-based Discussion of Opportunity Gaps</i></li> </ul> <p><i>Forum Keynotes</i></p> <ul style="list-style-type: none"> <li>▪ <i>Dr. Ruha Benjamin, Education &amp; Tech Equity Advocate</i></li> <li>▪ <i>Dr. Stephanie Russo Carroll, leader on Indigenous Data Governance</i></li> </ul> |
| <p>4. Successfully deliver the Data Literacy Institute in partnership with APLU in Fall 2021 and Spring 2022.</p>   | <p><i>The first cohort of the Data Literacy Institute completed the two-semester course in May 2022.</i></p> <ul style="list-style-type: none"> <li>▪ <i>On average, 96% of DLI participants reported that their data literacy improved as a result of the experience.</i></li> <li>▪ <i>On average, 78% of DLI participants would recommend the experience to a colleague</i></li> </ul>  |



### **Success Indicators for July 2022-July 2023** (updated January 2023, progress report in July 2023)

1. Successfully complete two offerings of the Holistic Approach to IR course, increasing total year-to-year participation and with at least 75% of participants rating the experience as valuable.
2. The inaugural AIR LEADs course will launch in August 2022, with at least 75% of participants rating the experience as valuable.
3. Deliver the Data Literacy Institute in partnership with APLU in Fall 2022 and Spring 2023, with at least 75% of participants rating the experience as valuable.
4. NEW: The second offering of the AIR LEADs course will begin in August or September 2023. At the conclusion of the course, at least 75% of the participants will rate the experience as valuable.
5. NEW: Deliver the Data Literacy Institute (DLI) to at least one institutional cohort of higher education professionals twice a year (fall and spring) beginning in fall of 2023. At the conclusion of the DLI, at least 75% of the participants will report that they better understand their institution.

## **B-2. Policy Language**

*AIR empowers and supports higher education professionals in ... learning methods and tools of the institutional research profession.*

### **Interpretation – vision of success**

The “methods and tools of the IR profession” can be defined as the “knowledge and skills necessary for the effective, ethical, and equitable production, use, and communication of data and analyses.” AIR offers an extensive array of IR/IE-informed programming to its stakeholders through webinars, courses, workshops, conferences, and publications.

An important part of AIR’s programming is the [IPEDS training and education](#) delivered within a subcontract with RTI International as part of a larger contract with the U.S. Department of Education’s National Center for Education Statistics (NCES). The NCES contract rebid was successful and renewed for another 5-years beginning in April of 2022. This training is fully funded through the contract and offered at no charge to all stakeholders and the public.

Another key piece of IR/IE-focused programming is the annual [AIR Forum](#) – typically the largest in-person gathering of IR/IE and data professionals in the nation. The program includes an array of sessions, panels, discussion groups, and posters that are largely crowd-sourced from the IR/IE community.

A third set of programming was added in 2022 – training and resources to support data submission and data use for the Postsecondary Data Partnership from the National Student Clearinghouse. The work is funded by a grant from the Bill & Melinda Gates Foundation. As with the IPEDS training, [PDP training](#) is offered at no charge to stakeholders.

In addition to these larger sets of education and training offerings, higher education professionals can learn more about the methods and tools of the IR profession through an array of online courses, workshops, and webinars.

### 2021-22 Policy B-2 Success Indicators

| 2021-22 Indicator  | Results as of July 2022   |
|--|---|
| <p>1. Meet the deliverable requirements of the NCES/IPEDS contract to increase data use and data quality for the 2021-22 NCES reporting period.</p>  | <p><i>The requirements for the NCES/IPEDS contract were successfully met for the 2021-22 cycle, despite the disruption of the pandemic. Highlights include the following.</i></p> <ul style="list-style-type: none"> <li>▪ <i>Participation numbers across all training modalities were consistent with previous, non-pandemic years.</i></li> <li>▪ <i>At least 94% of respondents agreed IPEDS training courses or workshops “improved their knowledge of IPEDS.”</i></li> <li>▪ <i>76% of participants in the NCES National Data Institute would recommend the experience to a colleague.</i></li> </ul> |
| <p>2. Attain a new subcontract with RTI International for the next cycle of NCES/IPEDS contract work.</p>  | <p><i>In April of 2022, RTI, AIR, and several other subcontractors were awarded the IPEDS training contract for another 5 cycles – through 2027.</i></p>  |
| <p>3. Continue to offer the Foundations workshop series as planned through the end of 2021. Success indicators for 2022, including registration targets, will be established based on lessons learned in 2021.</p> | <p><i>The Foundations Workshop series was moved to a quarterly schedule in 2022, with a target of 75 students each quarter across all five workshops.</i></p> <ul style="list-style-type: none"> <li>▪ <i>Enrollment for Q1 2022 was below expectations with 33 students.</i></li> <li>▪ <i>Enrollment for Q2 2022 was just below the target with 74 students.</i></li> <li>▪ <i>Satisfaction among participants was high, with over 90% indicating they would recommend the workshop to a colleague.</i></li> </ul>  |
| <p>4. Successfully host the first in-person Forum in two years (June 6-9, 2022) by meeting the participation and financial targets that will be established by the end of 2021.</p>                                | <ul style="list-style-type: none"> <li>▪ <i>The 2022 Forum was successfully convened in Phoenix as measured by participant satisfaction. 91% of participants who completed the conference evaluation would recommend the Forum to a colleague. This is consistent with the evaluation results from 2015-2019 Forums.</i></li> </ul>   |

| 2021-22 Indicator                                       | Results as of July 2022  |
|---|--|
|   | <ul style="list-style-type: none"> <li>▪ <i>The total attendance of 1,123 was below the target of 1,500. An analysis of the financial impact is currently underway.</i></li> </ul>   |
| 5. Increase year-to-year participation in AIR webinars. | <p><i>Total registrations as of mid-July 2022 for all webinars is 751 or about 42% of the total webinar registrants for 2021 – i.e., the registration number is tracking below the target goal of increasing year over year participation. The number of webinar offerings will be greater in the second half of 2022, so reaching the target goal remains possible.</i></p> |

### **Success Indicators for July 2022 to July 2023** (updated January 2023, progress report in July 2023)

1. Successfully complete two offerings of the Holistic Approach to IR course, increasing total year-to-year participation and with at least 75% of participants rating the experience as valuable.
2. Offer the Foundations Workshop series once each quarter, increasing total year-to-year participation and with at least 75% of participants rating the experience as valuable.
3. Offer a high-quality experience for participants at the 2023 Forum in Cleveland, with attention to rebuilding attendance and mitigating financial risk. The attendance goal for 2023 is 1,400 attendees with at least 80% indicating they would recommend the Forum to a colleague.
4. Consistently offer webinars throughout the year, including topics that are proposed by the community. Increase total registration numbers by 10% over 2022 levels.
5. NEW: Conduct 50 virtual IPEDS workshops during the 2022-2023 contract period with a total of 1,000 or more participants. At least 75% of participants will rate the workshop as valuable.
6. NEW: Develop and pilot a new IPEDS “tools” workshop by the end of the 2022-2023 contract cycle.
7. NEW: Offer at least 12 PDP workshops in 2023 with a total of 500 or more participants. At least 75% of participants will rate the workshop as valuable.

### **B-3. Policy Language**

*AIR empowers and supports higher education professionals in ... evaluating the effectiveness of institutions.*

#### **Interpretation – vision of success**

AIR provides education and resources for higher education professionals to learn strategies and practices for evaluating institutional effectiveness in a variety of ways, including webinars and workshops. AIR also advances the knowledge and practice of institutional effectiveness evaluation through original research and analysis – including the effectiveness of the IR/data function.

**2021-22 Policy B-3 Success Indicators**

| 2021-22 Indicator  | Results as of July 2022   |
|--|---|
| Develop a working definition of “evaluating institutional effectiveness” in consultation with stakeholders by the end of 2022. | <p><i>Rather than convening an advisory group to come up with an “ideal” definition, AIR determined that a more action-oriented approach was warranted. The interpretation and success indicators for 2022-23 have been revised to reflect this new approach.</i></p> <p><i>Work already underway in this area include:</i></p> <ul style="list-style-type: none"> <li>▪ <i>The release of benchmarking tools in January of 2022 for use by IR directors completing the National Survey of IR Offices.</i></li> <li>▪ <i>The completion of a landscape analysis for the UNCF Institute for Capacity to identify a core set of indicators on institutional health. The work was contracted as part of AIR’s participation in the Gates Service Design and Delivery network.</i></li> </ul> |

**Success Indicators for July 2022 to July 2023**

1. Incorporate content on evaluating institutional effectiveness into professional education offerings before July 2023 - attending to feedback from stakeholders on specific topics or areas of interest.
2. Within the next 6-9 months, release a series of research briefs on the findings from the National Survey of IR offices to increase the knowledge and understanding of IR office operations and their effectiveness.
3. Continue AIR’s contributions within the Gates Service Design and Delivery network as a data capacity partner through at least one service engagement to support institutional improvement. (The overall goal of the SD&D is to transform institutions to increase equitable student outcomes for minoritized students.)

**B-4. Policy Language**

*AIR empowers and supports higher education professionals in ... conducting research and scholarship.*

**Interpretation – vision of success**

AIR provides opportunities for higher education professionals to learn and practice research, including both quantitative and qualitative methodologies, through a variety of mechanisms, including webinars, courses, Forum workshops, the Data Literacy Institute, and the NCES Data Institute. AIR also offers

opportunities for stakeholders to disseminate their original research and effective practices through eAIR, AIR Professional File, webinars, and Forum presentations.

### 2021-22 Policy B-4 Success Indicators

| 2020-21 Indicator  | Results as of July 2022  |
|--|--|
| <p>1. Continue to incorporate content on research methodologies and/or methods into professional education offerings, attending to feedback from stakeholders on specific topics or areas of interest.</p> | <p><i>Examples of professional education offerings specifically designed to increase research skills:</i></p> <p><u>Webinars</u> (registered = 576)</p> <ul style="list-style-type: none"> <li>• 10/20/21: Sentiment Analysis in R</li> <li>• 3/10/22: Where Are They? Using GIS Technology To Locate Your Institution's Stakeholders</li> <li>• 4/13/22: A Brief Tour of Data Science Statistical Methods</li> <li>• 6/29/22: Using Power BI to construct a course trajectory analysis</li> </ul> <p><u>Foundations Workshops</u> (courses offered 6 times between July 2021 and June 2022, total of 127 registered)</p> <ul style="list-style-type: none"> <li>• Research Design</li> <li>• Survey Design</li> <li>• Descriptive Statistics</li> </ul> <p><u>Forum Workshops</u> (registered = 63)</p> <ul style="list-style-type: none"> <li>• How to Analyze and Visualize Institutional Data in R</li> <li>• Assessment 101: A Step by Step Guide for Non-Academic Unit Assessment</li> <li>• Improving Equity, Inclusion, and Socially Just Assessment Practices</li> </ul> <p><u>Forum session:</u> AIR staff planned and executive a session titled "Scholarly Writing and Publishing: Advice from Editors."</p> <p><u>NCES Data Institute</u> (part of IPEDS contract)</p> <ul style="list-style-type: none"> <li>• 4/28/22: A free webinar shared research findings from studies conducted by 2020 and 2021 Institute participants. (64 registrants).</li> <li>• The 2022 Institute successfully convened 31 participants virtually in June.</li> <li>• Applications for the 2023 Institute will open in fall 2022.</li> </ul> |

| 2020-21 Indicator  | Results as of July 2022  |
|--|--|
| 2. Continue publication of original research and effective practices from the field in AIR Professional File and eAIR. | <p><i>AIR Professional File</i></p> <ul style="list-style-type: none"> <li>• <i>Two new editions were published - Fall 2021 and Spring 2022.</i></li> <li>• <i>Supported publication of the NCES Data Institute group research papers through a presentation by AIR staff and peer review of all papers submitted to Professional File.</i></li> </ul> <p><i>eAIR issue in March 2022 focused on the application of analytics and effective practices.</i></p> |

### Success Indicators for July 2022 to July 2023 (updated January 2023, progress report in July 2023)

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 2022-23.
3. Partner with the NCES Data Institute to encourage publication of the group research papers, including a presentation by AIR staff at the Institute and peer review of all Institute papers submitted to Professional File.
4. NEW: Deliver the Data Literacy Institute (DLI) to at least one institutional cohort of higher education professionals twice a year (fall and spring) beginning in fall of 2023. At the conclusion of the DLI, at least 75% of the participants will report that their data literacy skills have improved.

### C. Policy Language

*AIR provides opportunities for the development of professional and interpersonal skills.*

#### Interpretation – vision of success

AIR will offer educational programming and content to provide opportunities for IR/data professionals to develop as individuals and leaders within their organizations and the higher education community.

AIR will continue to offer and highlight opportunities for the development of leadership, professional, and interpersonal skills within educational programming, particularly on the topics of effective communication with data, the ethical use of data, and the equitable use of data.

#### Success Indicators: 2021-2022

| 2021-22 Indicator   | Results as of October 2022   |
|---|--|
| 1. A leadership seminar will be planned, communicated, and delivered in 2022 with a | <ul style="list-style-type: none"> <li>• <i>A new leadership course [LEADs - Leadership with Evidence, Analytics, and Data] was launched in</i></li> </ul> |

| 2021-22 Indicator   | Results as of October 2022   |
|---|--|
| <p>majority of participants satisfied with their experience.</p>  | <p><i>August of 2022 with experienced leaders from the AIR community serving as curriculum developers and instructors. Total enrollment was 71 individuals, exceeding our internal target of 60 participants.</i></p> <ul style="list-style-type: none"> <li>• <i>The LEADs experience includes an in-person 2-day seminar held in DC in August as well as 5 monthly virtual meetings that will conclude in early January 2023.</i></li> <li>• <i>96% of the seminar participants rated the experience as “good or excellent.” The LEADs team continues to evaluate the experience of the monthly virtual session and has used the feedback to adjust the delivery of the content – i.e., adding more time for small group discussions.</i></li> </ul>   |
| <p>2. Professional development opportunities in the areas of effective communication, ethics, and equity will be offered in 2022.</p> | <p><i>2022 Forum Workshops (registered=29)</i></p> <ul style="list-style-type: none"> <li>• <i>Learning to lead: Equity-Centered Collaboration for Success</i></li> <li>• <i>Ethics in the IR Office</i></li> <li>• <i>Improving Equity, Inclusion, and Socially Just Assessment Practices</i></li> </ul> <p><i>Webinar (registered=69)</i></p> <ul style="list-style-type: none"> <li>• <i>5/10/22 - Practical Steps to Start a Broad-based Discussion of Opportunity Gaps</i></li> </ul> <p><i>Course – A Holistic Approach to IR</i></p> <ul style="list-style-type: none"> <li>• <i>4 cohorts participated in the course during 2022, for a total of 109 participants.</i></li> <li>• <i>The <u>course</u> includes discussion of the AIR Statement of Ethical Principles, transforming data to information, knowing your audience, and communicating with senior leaders.</i></li> </ul> <p><i>eAIR featured articles</i></p> <ul style="list-style-type: none"> <li>• <i>Considerations for Ethical Use of Data During a Pandemic (November 2021)</i></li> <li>• <i>Why Good Intentions aren’t Enough to Use Data Ethically (February 2022)</i></li> <li>• <i>IR Professionals as Change Agents (August 2022)</i></li> </ul> |
| <p>3. Communication about existing educational programming will more explicitly connect the</p>                                       | <ul style="list-style-type: none"> <li>• <i>Of the approximately 80 emails that were sent regarding educational training during the</i></li> </ul>   |

| 2021-22 Indicator   | Results as of October 2022  |
|---|---|
| programming to the development of professional, interpersonal, and leadership skills. | <i>reporting period, about 20% directly mentioned the professional, interpersonal, and leadership skills in the email subject line.</i> |

**Success Indicators for November 2022 to October 2023** (updated January 2023, progress report in October 2023)

1. At least two professional development opportunities will be offered on effective communication, ethics, and/or equity in 2023.
2. NEW: The second offering of the AIR LEADs course will begin in August or September 2023. At the conclusion of the course, at least 75% of the participants will rate the experience as valuable.

#### D. Policy Language

*AIR promotes the development of professional networks.*

#### Interpretation – vision of success

AIR will provide an array of opportunities for its stakeholders to learn, grow, and connect with other IR and data professionals both in-person and virtually. AIR will also seek mechanisms for networking and connection between IR professionals and other non-IR professionals.

#### Success Indicators: 2021-2022

| 2021-22 Indicator   | Results as of October 2022   |
|---|--|
| 1. Continue to increase the number of individuals participating in the AIR Hub online community within the next 12 months [October 2021 to September 2022] with a target of 500 new users.  | <ul style="list-style-type: none"> <li>• <i>The number of new subscribers to the AIR Hub online community between October 2021 and September 2022 was 1,114 – double the target of 500 new users. The total number of AIR Hub subscribers at the end of September 2022 was 2,951.</i></li> </ul> |
| 2. Increase the proportion of AIR Hub users who post or reply on a regular basis. (Current estimate of active users in the 10-12% range)  | <ul style="list-style-type: none"> <li>• <i>31% of Hub users (920 individuals) have created or downloaded a document and/or created a new thread replied to group/sender within the AIR Hub community since its launch in summer of 2020.</i></li> </ul>   |
| 3. Host the 2022 AIR Forum in Phoenix AZ and provide multiple ways for attendees to interact and reconnect with colleagues with a priority on health and safety and attention to the comfort levels of attendees. Post-event evaluations will indicate that a majority of respondents were satisfied with the Forum experience. | <ul style="list-style-type: none"> <li>• <i>The first in-person AIR Forum since 2019 was convened in Phoenix, with 91% of evaluation respondents indicating they would recommend the Forum to a colleague. This is consistent with the evaluation results from 2015-2019 Forums.</i></li> </ul>  |



| 2021-22 Indicator   | Results as of October 2022   |
|---|--|
|   | <ul style="list-style-type: none"> <li>85% of evaluation respondents believed there was sufficient time devoted to networking with colleagues.</li> </ul> <p>The response rate for the Forum evaluation was 38% and slightly higher than the response rates for 2019, 2020, and 2021.</p>  |
| 4. Sponsor at least one event focused on connecting AIR stakeholders with other higher education professionals in 2022. | <ul style="list-style-type: none"> <li>While AIR was unable to jointly sponsor a networking/learning event with another association during the reporting period, AIR staff participated in several learning events at other organizations on behalf of the AIR community includes AACRAO, the Assessment Institute, CUPA-HR conference, National Academies of Sciences, Engineering, and Medicine Board of Directors meeting, New England College Assessment Conference Northwest Commission on Colleges and Universities, and UNCF Unite Conference.</li> </ul> |
| 5. Offer at least one virtual event each quarter for the AIR community to connect and learn together.                   | <ul style="list-style-type: none"> <li>A total of 6 monthly coffee chats were held between March and October of 2022. The coffee chats are informal networking opportunities that are free and open to all AIR members. The total attendance across all coffee chats was approximately 80 and may include duplicates.</li> </ul>   |

**Success Indicators for November 2022 to October 2023** (updated January 2023, progress report in October 2023)

- Continue to expand the use of the AIR Hub online community as an effective mechanism for AIR stakeholders to connect, share, and learn. Outcomes for 2022-23 will include the planning and implementation of an IPEDS user group as well as increasing the number of new users.
- Successfully host the 2023 AIR Forum in Cleveland and provide multiple ways for attendees to build and sustain professional networks. Post-event evaluations will indicate that at least 75% of respondents were satisfied with the networking opportunities provided at the Forum.
- Offer at least one virtual event each quarter for AIR members to connect and learn together.
- Identify and reach out to at least one higher education professional community outside of IR/IE as part of the implementation of the organizational membership option. (Public launch date is January 2024)
- In partnership with NACUBO and Educause, AIR will work with subject matter experts from the respective professional communities in 2023 to develop an “analytics guide” that outlines the typical steps and sequences necessary for institutions to fully leverage capacity development centered on analytics and strategic data use. The work is funded by the Gates Foundation and

the delivery date for the guide is April of 2024. The work builds on the “joint statement of analytics” and is funded through the Gates Foundation.