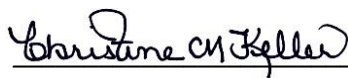


I. Ends Monitoring Report

October 2023 Report on Policies C-D (pg. 19)

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



Christine Keller, Executive Director & CEO

October 31, 2023

Submitted (date)

Notes: The AIR Ends were revised and adopted by the AIR Board of Directors at its meeting on May 29, 2023. The updated Ends policy is below. This report references the previous version of the Ends as the interpretations and success indicators were established based on the previous policies. **Updates to the interpretations and success indicators for the new Ends policies will be included in the January 2024 Ends monitoring report.**

Any updates, changes, or additions are in blue font. Ends reports are provided quarterly for specific sets of policies (see BRE III and/or the [Board Operating Calendar](#)).

UPDATED AIR ENDS - (adopted 5/29/2023)

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.

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"> • 90% of respondents who were familiar with AIR would recommend AIR’s programs, resources, and services to a colleague. <i>(4% were “not familiar” and not included in the calculation.)</i> • 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.” <i>(5% were “not familiar” and not included in the calculation.)</i>

2021-22 Indicator	Results as of January 2023
	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%.
2. The membership target for 2022 is 3,000 individual members by December 31, 2022.	<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"> • 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. • 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.

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.

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
<p>1. Release and promote a series of data briefs 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>	<p>Five brief have been published.</p> <ol style="list-style-type: none"> 1. Staff Roles, FTE, and Characteristics 2. Full-time Staff Salaries 3. Staff Job Functions and Salary Expenditures 4. Leadership and Management 5. Executive Leadership for the Data and Analytics Function <p>Four additional briefs will be published in 2023. (The final titles may vary slightly.)</p> <ol style="list-style-type: none"> 6. IR Work Functions 7. Reporting Relationships 8. Professional Development 9. Data Capacity, Literacy, Maturity
<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 “joint statement of analytics” and is funded through the Gates Foundation.</p>	<ul style="list-style-type: none"> • 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. • Additional engagement with association members and institutions will take place virtually and at the three associations’ 2023 conferences.
<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"> • 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

2022-23 Indicator	Results as of April 2023
	networks, including other higher education organizations (e.g., AACU, UNCF).

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 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 include the Foundations Workshops, A Holistic Approach to Institutional Research, Leadership with Evidence, Analytics, and Data (LEADs), and Data Literacy Institute (DLI).

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, briefs, statements, and publications – National Survey of Institutional Research Offices, A Holistic Approach to IR course, Leadership with Evidence, Analytics, and Data (LEADs) course, the joint Statement on Analytics with EDUCAUSE and NACUBO; the *Statement of Aspirational Practice for IR*; the *Statement of Ethical Principles*; and the *Statement on Racial Injustice*.

2022-23 Policy B Success Indicators

2022-23 Indicators	Results as of July 2023
1. The inaugural AIR LEADs course will launch in August 2022, with at least 75% of participants rating the experience as valuable.	<p>The LEADs course launched in August 2022 with 69 individuals registered. It consisted of an in-person seminar in DC supplemented by 5 virtual meetings between September 2022 and January 2023.</p> <p>85% of the participants responding to the overall evaluation indicated they would recommend the LEADs experience to a colleague.</p>
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.	<p>The second cohort of the Data Literacy Institute completed the two-semester course in May 2023.</p> <p>Across the 6 sections of the DLI, on average, 72% of the respondents would recommend the experience to a new colleague. (Note that the response rates for each section ranged from 16% to 44%)</p>
3. Host at least two learning opportunities for the AIR community on the use of data and analytics to support equity or ethics.	<p>Examples of learning opportunities in 2022-2023 that focused on the use of data and analytics to support equity or ethics.</p> <p><u>Webinar</u></p> <ul style="list-style-type: none"> ▪ February 2023: <u>A Value Proposition for All Students: Integrating Quantitative and Qualitative Data for More Equitable Return on Investment and Economic Mobility</u> <p><u>Forum Workshops (May 2023)</u></p> <ul style="list-style-type: none"> ▪ Show Me The Numbers: Sharing Data With Stakeholders ▪ Beyond Compliance: How to Use IPEDS Data to Examine Student and Institutional Success <p><u>eAIR articles</u></p> <ul style="list-style-type: none"> ▪ 1/27/23: <u>The Provision of PII Data On Faculty and Staff By Institutional Researchers</u> ▪ 3/30/23: <u>Online Colleges and Universities: Are They Delivering on Diversity and Inclusion? A Recent Analysis from IPEDS Data</u> ▪ 3/30/23: <u>AI in Higher Education: Implications for Institutional Research</u>
4. 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	<p>The <u>2023 LEADs</u> course launches in August. The seminar will be held in DC on August 24-25.</p>

2022-23 Indicators	Results as of July 2023
participants will rate the experience as valuable.	
5. 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.	Outreach and consultation are ongoing to recruit and vet potential institutions and develop cohorts for the DLI. The first DLI outside of the grant-funded work is planned for spring 2024, rather than fall 2023.

Updated Policy 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...

Interpretation – vision of success: TBD

Success Indicators for July 2023-June 2024: TBD

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.”¹

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.

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

2022-23 Policy B-1 Success Indicators

2022-23 Indicator	Results as of July 2023
<p>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.</p>	<p>Three instances of the Holistic course were offered during the reporting period – two in Fall 2022 and one in Spring 2023. The registration target for each period was 35 participants.</p> <p><u>Fall 2022</u></p> <ul style="list-style-type: none"> ▪ A special cohort for Tribal Colleges in partnership with Achieving the Dream had a total of 26 participants. 79% of those responding to the course evaluation agreed that the course increased their understanding of IR. ▪ A second cohort of the fall 2022 Holistic course had 18 participants. Only 4 individuals responded to the evaluation – 100% agreed that the course increased their understanding of IR. <p><u>Spring 2023</u></p> <ul style="list-style-type: none"> ▪ The cohort included 42 participants, and 85% of those responding to the course evaluation would recommend the course to a colleague.
<p>2. The inaugural AIR LEADs course will launch in August 2022, with at least 75% of participants rating the experience as valuable.</p>	<p>The LEADs course launched in August of 2022 with 69 individuals registered. It consisted of an in-person seminar in DC (August 11-12) supplemented by 5 virtual meetings from September 2022 to January 2023.</p> <p>85% of the participants responding to the overall evaluation indicated they would recommend the LEADs experience to a colleague.</p>
<p>3. Deliver the Data Literacy Institute (DLI) in partnership with APLU in Fall 2022 and Spring 2023, with at least 75% of participants rating the experience as valuable.</p>	<p>A second, grant-funded cohort of the DLI completed the two-semester course in May 2023. The DLI was offered in partnership with APLU.</p> <p>Across the 6 sections of the DLI, on average, 72% of the respondents would recommend the experience to a new colleague. (Note that the response rates for each section ranged from 16% to 44%)</p>
<p>4. 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</p>	<p>The <u>2023 LEADs</u> course launches in August. The seminar will be held in DC on August 24-25.</p>

2022-23 Indicator	Results as of July 2023
the participants will rate the experience as valuable.	
5. 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.	Outreach and consultation are ongoing to recruit and vet potential institutions and develop cohorts for the DLI. The first DLI outside of the grant-funded work is planned for spring 2024, rather than fall 2023.

Updated Policy B-1: 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: TBD

Preliminary Success Indicators for July 2023 to June 2024

1. Offer two instances of the Holistic Approach to IR course with at least 75% of participants rating the experience as valuable.
2. Offer the AIR LEADs course in 2024. At the conclusion of the course, at least 75% of the participants will rate the experience as valuable.

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 conference – the [AIR Forum](#). The four-day program includes an array of pre-conference workshops, sessions, panels, discussion groups, and posters that are primarily crowd-sourced and peer-reviewed by the IR/IE community.

A third set of programming was added in 2022 – training and resources to support data submission and data use of 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 as well as the AIR Professional File volumes, National Survey of IR Office survey briefs, and the eAIR newsletter.

2022-23 Policy B-2 Success Indicators

2022-23 Indicator	Results as of July 2023
<p>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.</p>	<p>Three instances of the Holistic course were offered during the reporting period – two in Fall 2022 and one in Spring 2023. The registration target for each period is 35 participants.</p> <p><u>Fall 2022</u></p> <ul style="list-style-type: none"> ▪ A special cohort for Tribal Colleges in partnership with Achieving the Dream had a total of 26 participants. <i>(No course evaluation results are available for this cohort.)</i> ▪ A second cohort of the fall 2022 Holistic course had 18 participants. <i>(No course evaluation results are available for this cohort.)</i> <p><u>Spring 2023</u></p> <ul style="list-style-type: none"> ▪ The cohort included 42 participants, and 85% of those responding to the course evaluation would recommend the course to a colleague.
<p>2. Offer the Foundations Workshop series (5 workshops total) once each quarter, increasing total year-to-year participation and with at least 75% of participants rating the experience as valuable.</p>	<p>Across all the Foundations workshops offered during the reporting period, 87% of the respondents to the post-workshop evaluation would recommend the workshop to a colleague.</p> <ul style="list-style-type: none"> ▪ <u>2022</u>: The workshop series was offered once in Q3 and once in Q4. The registration totals for Q3 and Q4 were 68 and 50, respectively, for the 5-part series. ▪ <u>2023</u>: Due to historically lower participation rates, the workshop series was not held in Q1.

2022-23 Indicator	Results as of July 2023
	The series restarted in Q2 of 2023. The registration total was 77 for the 5-workshop series.
3. Offer a high-quality experience for participants at the 2023 AIR Forum in Cleveland, with attention to rebuilding attendance after the pandemic-induced decline 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.	<p>The 2023 AIR Forum was successfully convened in Cleveland 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 other in-person Forums - 2015-2019 and 2022.</p> <p>The total attendance of 1,301 was below the target of 1,400. However, the paid registrations of 1,143 exceeded the target of 1,120 and no attrition penalties were incurred. The final financial analysis is not yet complete, but preliminary figures indicate an increase in revenue over 2022.</p>
4. Consistently offer webinars throughout the year, including topics that are proposed by the community. Increase total registration numbers by 10% over 2022 levels.	Total registrations as of mid-July 2023 for all webinars (free and paid) are 1,052 and above the registration count of 751 at this time last year. However, the number of webinars and the mix of free and paid vary widely from year-to-year so comparisons should be viewed within that context.
5. Conduct 50 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 workshops as valuable.	<p>Preliminary data for the 2022-2023 contract period show the following:</p> <ul style="list-style-type: none"> ▪ A total of 59 workshops (virtual and in-person) with 1,435 participants. ▪ On average, at least 89% of the workshop participants would recommend each of the workshops to a colleague.
6. Develop and pilot a new IPEDS “tools” workshop by the end of the 2022-2023 contract cycle.	The IPEDS Tools workshop was piloted at the 2023 AIR Forum to a select group of IPEDS Educators. The workshop content was also shared with the full group of IPEDS Educators during the July 2023 Institute for IPEDS Educators for feedback and input. The workshop will be finalized and offered publicly during the 2023-2024 contract cycle, which begins in August 2023.
7. Offer at least 12 PDP workshops in 2023 with a total of 500 or more participants. At least 75%	As of 7/31/2023, 11 PDP workshops have been offered with a total of 708 individuals participating.

2022-23 Indicator	Results as of July 2023
of participants will rate the workshop as valuable.	Of those responding to the post-workshop surveys across all the 2023 PDP workshops, 70% indicated they would recommend the workshop to a colleague.

Updated Policy B-2: 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: TBD

Preliminary Success Indicators for July 2023 to June 2024

1. Conduct 50 IPEDS workshops during the 2023-2024 contract period with a total of 1,000 or more participants. On average, at least 80% of participants will rate the workshops as valuable.
2. Successfully offer a new IPEDS tools workshop at least twice by the end of the 2023-24 contract period. At least 75% of the participants will rate the workshop as valuable.
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 preliminary attendance goal for 2024 is 1,400 to 1,500 with at least 80% rating the experience as valuable.
4. Consistently offer webinars throughout the year – with a mix of free and paid webinars, including topics recommended by the community.
5. Successfully complete two offerings of the Holistic Approach to IR course, with at least 75% of participants rating the experience as valuable.
6. Offer the Foundations Workshop series multiple times during the period, with at least 75% of participants rating the experience as valuable.
7. Offer at least 12 PDP workshops in 2024 with a total of 500 or more participants. At least 70% 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.

2022-23 Policy B-3 Success Indicators

2022-23 Indicator	Results as of July 2023
<p>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.</p>	<p>Examples of professional education offerings in 2022-2023 that include tools, methods, or concepts that facilitate the evaluation of institutional effectiveness:</p> <p><u>Webinars</u></p> <ul style="list-style-type: none"> • August 2022: Tracking the Progress of Your Strategic Plan <p><u>Forum Workshops</u> (May 2023)</p> <ul style="list-style-type: none"> • Assessment 101: A Step-by-Step Guide for Non-Academic Unit Assessment • Creating Data Visualizations to Tell Your Cost and Productivity Story • Using Concept Mapping to Build an Interface to Institutional Knowledge • How to Effectively Manage Your Office
<p>2. 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.</p>	<p>The following briefs from the National Survey have been published related to the effectiveness of IR office operations.</p> <ul style="list-style-type: none"> • <i>Staff Roles, FTE, and Characteristics</i> • <i>Full-time Staff Salaries</i> • <i>Staff Job Functions and Salary Expenditures</i> • <i>Leadership and Management</i> • <i>Executive Leadership for the Data and Analytics Function</i> • <i>IR Work</i> • <i>IR Reporting Relationships</i> • <i>Data Capacity, Literacy, Maturity</i> • <i>Professional Development</i>

2022-23 Indicator	Results as of July 2023
<p>3. Continue AIR’s contributions within the Gates Foundation Service Design and Delivery (SD&D) network as a data capacity partner through at least one service engagement to support institutional improvement. (The overall goal of SD&D is to transform institutions to increase equitable student outcomes for minoritized students.)</p>	<p>The following service engagements and deliverables were completed as part of the Gates Foundation S&D network during the reporting period.</p> <ul style="list-style-type: none"> • Report delivered to UNCF (United Negro College Fund) in September 2022: <i>Institutional Metrics that Matter: A Landscape Study</i> • Custom training delivered to the North Carolina Community College System (NCCCS) schools in June 2023: <i>AIR Data Literacy Training: North Carolina Community College System Dashboards</i> • Data literacy training was delivered to three APLU institutions in Spring 2023.

Updated Policy B-3: 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: TBD

Preliminary Success Indicators for July 2023 to June 2024

1. Deliver the Data Literacy Institute (DLI) to at least one institutional cohort of higher education professionals twice a year (fall and spring) beginning in spring of 2023. At the conclusion of the DLI, at least 75% of the participants will report that they better understand their institution.
2. TBD

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.

2022-23 Policy B-4 Success Indicators

2022-23 Indicator	Results as of July 2023
<p>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.</p>	<p>Examples of professional education offerings in 2022-2023 designed to increase research skills:</p> <p><u>Webinars</u></p> <ul style="list-style-type: none"> • July 2022: Using Market Basket Analysis, A Data Mining Tool to Gain Insight into Student Course Failures • September 2022: Hidden Student Perceptions: Sentiment Analysis as Visualized through Power BI • January 2023: Providing Timely and Actionable Intelligence: Using Enrollment Management Analytics to Support Student Success • February 2023: A Value Proposition for All Students: Integrating Quantitative and Qualitative Data for More Equitable Return on Investment and Economic Mobility <p><u>Foundations Workshops</u> (courses offered 3 times between July 2022 and June 2023)</p> <ul style="list-style-type: none"> • Research Design • Survey Design • Descriptive Statistics <p><u>Forum Workshops</u> (May 2023)</p> <ul style="list-style-type: none"> • Telling Student Stories: Qualitative Data and Mixed Methods in IR • Assessment 101: A Step-by-Step Guide for Non-Academic Unit Assessment • The Art and Science of Enrollment Forecasting • Creating Data Visualizations to Tell Your Cost and Productivity Story • IR Bootcamp: Foundation for any IR Professional <p><u>2023 Forum session</u>: AIR staff planned and coordinated a session titled “Writing for Publication: Advice from Writers and Editors.”</p> <p><u>NCES Data Institute</u> (part of IPEDS contract)</p>

2022-23 Indicator	Results as of July 2023
	<ul style="list-style-type: none"> • April 2023: Two free webinars shared research findings from studies conducted by 2022 Institute participants. • The 2023 Institute successfully convened 29 participants in DC, June 13-15. • Applications for the 2024 Institute will open in fall 2023.
2. Publish original research and effective practices from the field in AIR Professional File at least twice in 2022-23.	Two new issues were published - Fall 2022 and Spring 2023.
3. Partner with the NCES Data Institute to encourage publication of the group research papers, including a presentation by AIR staff and peer review of all Institute papers submitted to Professional File.	<ul style="list-style-type: none"> • Supported publication of the NCES Data Institute group research papers through a presentation by AIR staff • The Spring 2023 volume of AIR Professional File featured three articles started as part of the Institute as group research projects.
4. 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.	Outreach and consultation are ongoing to recruit and vet potential institutions and develop cohorts for the DLI. The first DLI outside of the grant-funded work is planned for spring 2024, rather than fall 2023.

Updated Policy B-3: 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: TBD

Preliminary Success Indicators for July 2023 to June 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.
2. Publish original research and effective practices from the field in AIR Professional File at least twice in 2023-2024.
3. Partner with the NCES Data Institute to encourage publication of the group research papers, including information on publishing and peer review of all Institute papers submitted to Professional File.

4. Deliver the Data Literacy Institute (DLI) to at least one institutional cohort of higher education professionals twice a year (fall and spring) beginning in spring of 2023. At the conclusion of the DLI, at least 75% of the participants will report that their data literacy skills have improved.

Updated October 2023

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: 2022-2023

2022-2023 Indicator	Results as of October 2023
<p>1. At least two professional development opportunities will be offered on effective communication, ethics, and/or equity in 2023.</p>	<p><i>2023 Forum Workshops</i></p> <ul style="list-style-type: none"> • <i>Creating Data Visualizations to Tell Your Cost and Productivity Story</i> <p><i>Webinars</i></p> <ul style="list-style-type: none"> • <i>1/20/23 - Understanding How IR and Public Policy Interact and How You Can Be a Data Influencer</i> • <i>2/14 & 2/16/23 -A Value Proposition for All Students: Integrating Quantitative and Qualitative Data for More Equitable Return on Investment and Economic Mobility</i> • <i>4/24/23- 2022 NCES Data Institute Research Report: Fostering Pell Student Success: The Role of Institutional Characteristics</i> <p><i>Course – A Holistic Approach to IR</i></p> <ul style="list-style-type: none"> • <i>2 cohorts participated in the course during 2023, for a total of 80 participants.</i> • <i>The course includes discussion of the AIR Statement of Ethical Principles, transforming data to information, knowing your audience, and communicating with senior leaders.</i> <p><i>eAIR featured article</i></p> <ul style="list-style-type: none"> • <i>Online Colleges and Universities: Are They Delivering on Diversity and Inclusion? A Recent Analysis from IPEDS Data (March 2023)</i>

2022-2023 Indicator	Results as of October 2023
2. 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.	<i>The 2023 LEADs course began in August 2023 with a virtual kickoff gathering. An in-person seminar was held in DC on August 24-25, with monthly virtual meetings through January of 2024. A total of 78 participants registered for the course. The evaluation data will be available after January 2024.</i>

Policy C as stated was removed as of May 2023. The new “Policy C” aligns most closely with the old “Policy D” - see below.

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: 2022-2023

2022-2023 Indicator	Results as of October 2023
1. 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.	<ul style="list-style-type: none"> <i>The number of new subscribers to the AIR Hub online community between October 2022 and September 2023 was 1,890. The total number of AIR Hub subscribers at the end of September 2023 was 4,802.</i> <i>The IPEDS listserv was successfully transitioned to AIR Hub as of May 2023. As of October 2023, there are 1,297 community members and 118 discussion threads</i>
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	<ul style="list-style-type: none"> <i>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.</i> <i>Additional input was gathered from association members at the three associations’ 2023 conferences, an analytics conference, a virtual webinars, virtual focus groups, and a series of</i>

2022-2023 Indicator	Results as of October 2023
<p>"joint statement of analytics" and is funded through the Gates Foundation.</p>	<p><i>individual interviews with stakeholders from each of the three communities.</i></p>
<p>3. 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.</p>	<ul style="list-style-type: none"> • <i>The 2023 AIR Forum was successfully convened in Cleveland 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 other in-person Forums - 2015-2019 and 2022.</i> • <i>Specific networking opportunities at the 2023 Forum included a "first time at Forum" session; two receptions at the Exhibit Hall plus a reception at the Rock and Roll Hall of Fame; intentional breaks between sessions for informal meetings; space/time reserved for regional associations and other group gatherings; and a conference app that facilitated connections and sharing among attendees.</i> • <i>87% of evaluation respondents believed there was sufficient time devoted to networking with colleagues.</i> <p><i>(The response rate for the Forum evaluation was 41% and slightly higher than the response rates for the previous 4 years.)</i></p>
<p>4. 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)</p>	<ul style="list-style-type: none"> • <i>The organizational membership option is on track for a January 2024 public launch. The outreach strategy was to focus first on the leaders of IR/IE functions and then move to a community outside of IR/IE – likely in late 2024 or early 2025.</i>
<p>5. Offer at least one virtual event each quarter for the AIR community to connect and learn together.</p>	<ul style="list-style-type: none"> • <i>5 coffee chats were held between October 2022 and September 2023. The coffee chats are informal networking opportunities that are free and open to all AIR members.</i> • <i>7 free-to-members webinars were offered between October 2022 and September 2023 on a variety of topics including environmental scanning, CEDS, data literacy, public policy, and more.</i>

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

Interpretation – vision of success: TBD

Preliminary Success Indicators for November 2023 to October 2024

1. Continue to leverage the AIR Hub online community as an effective mechanism for AIR stakeholders from all backgrounds to connect, share, and learn.
2. Successfully host the 2024 AIR Forum in Denver and provide multiple ways for attendees to build and sustain diverse and inclusive professional networks. Post-event evaluations will indicate that at least 75% of respondents were satisfied with the networking opportunities provided at the Forum.
3. Offer at least one virtual event each quarter for AIR members to connect and learn together.
4. Identify and reach out to at least one higher education professional community outside of IR/IE as part of “Phase 2” implementation strategy of the organizational membership option.
5. In partnership with NACUBO and Educause, AIR deliver an analytics guide in April of 2024. The work builds on the [“joint statement of analytics”](#) and is funded through the Gates Foundation.