



Section 1: Data and Analytics Offices

Which best describes the IR/IE function at your institution? NOTE: This is a required question.

- There is a single office at my institution that provides IR/IE work (*NOTE: This represents the majority of U.S. institutions.*)
- There are multiple offices at my institution that provide IR and IE work.
- My institution does not have an independent IR or IE Office; the IR/IE function resides within another unit(s) (e.g., IT, business, enrollment management, registrar).
- Other (please specify)

BRANCH IF SINGLE OFFICE

What is your Office's official name (e.g., "Office of Institutional Research and Effectiveness", "Office of Institutional Research, Effectiveness, and Planning")?

Which best describes the organizational structure of your Office?

- One person/team under the leadership of a person with a Director-level position, or higher. (*NOTE: This represents most IR/IE Offices.*)
- Multiple teams/units, each led by a Director-level position (or higher), operating within the same Office (e.g., Director of Institutional Research, Director of Institutional Effectiveness, Director of Assessment). The leader of this Office is likely in a senior-level position (e.g., Provost, Associate/Assistant Provost)
- Other (please specify)

BRANCH IF MULTIPLE TEAMS/UNITS...

You indicated your office has multiple teams, each with a Director-level position or higher operating within the same Office (e.g., Director of Institutional Research, Director of Institutional Effectiveness, Director of Assessment).

In our attempt to include survey information on IR and IE Offices/Teams, we would like to survey the other Directors within your Office. Please provide their contact information so we can send them an invitation to this survey:

Director's contact information – REPEAT UP TO 5 DIRECTORS

- First Name:
- Last Name:
- Email Address:
- Title:

BRANCH IF MULTIPLE OFFICES

What is your Office's official name (e.g., "Office of Institutional Research", "Office of Institutional Effectiveness and Planning")?

In our attempt to include survey information on IR and IE Offices, we would like to survey the other Directors at your institution (e.g., Director of Institutional Research, Director of Institutional Effectiveness). Please provide their contact information so we can send them an invitation to this survey:

Director’s contact information – REPEAT UP TO 5 DIRECTORS

- First Name:
- Last Name:
- Email Address:
- Title:

BRANCH OFFICE DOESN’T EXIST

You indicated that your institution does not have an independent IR or IE office. Which office/unit do you work in?

END BRANCH

NOTE: For the remainder of this survey, we will refer to your office/unit/team as the “Office”.

Distributed Analysts

At your institution, are there data and analytics professionals within some/all administrative units (e.g., Enrollment Management, Financial Aid, Provost’s Office, Student Affairs)?

- Yes
- No
- I don’t know

BRANCH IF YES...

You indicated your institution has analysts within some/all administrative units. Which best represents the relationship between those analysts and the IR/IE Office?

- Analysts report directly to the IR/IE Office (direct-report relationship).
- Analysts report to their administrative units, but the IR/IE Office helps supervise their work (dotted-line relationship).
- While analysts have a collaborative relationship with the IR/IE Office, there is no reporting relationship.
- There is no relationship between analysts and the IR/IE Office.
- The relationship depends on the administrative unit.
- Other (please specify)

What is the approximate staff FTE (full-time equivalent) of these analysts working within administrative units?

- 1 FTE or less
- 2 to 5 FTE
- 6 to 10 FTE
- 11 to 15 FTE
- 16 to 20 FTE
- 21 to 30 FTE

- More than 30 FTE
- I don't know

END BRANCH

At your institution, are there data and analytics professionals within some/all academic colleges/schools?

- Yes
- No
- I don't know

BRANCH IF YES...

You indicated your institution has analysts within some/all academic colleges/schools. Which best represents the relationship between those analysts and the IR/IE Office?

- Analysts report directly to the IR/IE Office (direct-report relationship).
- Analysts report to their academic colleges/schools, but the IR/IE Office helps supervise their work (dotted-line relationship).
- While analysts have a collaborative relationship with the IR/IE Office, there is no reporting relationship.
- There is no relationship between analysts and the IR/IE Office.
- The relationship depends on the academic college/school.
- Other (please specify)

What is the approximate staff FTE (full-time equivalent) of these analysts working within academic colleges/schools?

- 1 FTE or less
- 2 to 5 FTE
- 6 to 10 FTE
- 11 to 15 FTE
- 16 to 20 FTE
- 21 to 30 FTE
- More than 30 FTE
- I don't know

END BRANCH

Section 2: Office Leadership

Are you the Office Leader? This person is responsible for Office leadership and management and may have a title like "Director of Institutional Research" or "Vice President of Institutional Research and Effectiveness". NOTE: This is a required question.

- Yes
- No, but the Office has a leader
- No, my institution does not have an independent IR/IE Office, but I am the highest-ranking IR/IE professional at my institution

- No; the Office Leader position is currently vacant

BRANCH IF “NO, BUT OFFICE HAS A LEADER”

You indicated that you are not the Office Leader, but your Office does have a leader. Please provide contact information of the Office Leader and we will send a survey invitation to them.

- First Name:
- Last Name:
- Email Address:

{CONTINUE SURVEY}

IF OFFICE LEADER POSITION IS VACANT, BRANCH TO “SECTION 3. OFFICE STRUCTURE”

Regardless of your official title, we will refer to you as the “Office Leader” for the remainder of the survey.

Which best describes your employment with the IR/IE Office?

- I am a full-time employee of the Office
- I am a part-time employee of the Office
- I am an employee of another office/unit but perform IR/IE work as part of my role

BRANCH IF PART-TIME EMPLOYEE OR EMPLOYEE OF ANOTHER OFFICE

You indicated that you were a part-time employee of the Office or an employee of another office/unit and performed IR/IE work as part of your role. Please estimate the percentage of your role devoted to IR/IE work (please enter an integer from 1-99):

END BRANCH

On average, how many hours do you work per week excluding vacation or other paid time off?	
What is your annual salary/wage excluding bonuses and benefits (e.g., healthcare, retirement)?	

Is your annual salary or wage aligned with your experience, education, and work effort?

- Yes
- No

If you believe your salary/wage is too low or too high, what factors might be contributing?

How many years have you spent in the following areas? Please enter a numeric response.

Working in higher education	
Working in the field of IR/IE (either at your current institution or not)	
Working at your current institution (either in your current position or not)	
Leading the Office at your current institution	

What is the highest degree you earned?

- Baccalaureate degree or lower

- Master’s degree/Specialist (M.A., M.S., Ed.S.)
- Doctoral degree, including professional practice doctorates (e.g., Ph.D., Ed.D., M.D., J.D.)

How old are you?

- Less than 30 years old
- 30 to 39 years old
- 40 to 49 years old
- 50 to 59 years old
- 60 to 69 years old
- 70 years old or older

Which best describes your gender identity?

- Woman
- Man
- Another gender
- Gender option is not provided
- Prefer not to answer

What is your race/ethnicity? Please choose all that apply.

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic or Latino/a
- Middle Eastern or North African (for example, Lebanese, Iranian, Egyptian, Syrian, Moroccan, Algerian, etc.)
- Native Hawaiian or Pacific Islander
- White
- Option not provided
- Prefer not to answer

Allocation of Time on Task

Considering the past year, estimate the percentage of time that you spent on the following tasks.

- Enter values from 0 to 100 (integers).
- Some tasks may not apply to you. In that case, please enter a zero (“0”)
- The total allocation of time must be 100%.

Brainstorming: Include time spent innovating, creating, designing, or researching solutions to new problems.	
Data collection and management: Include time gathering data used in Office work (e.g., collecting institutional data, survey research/focus groups). Include time spent storing, organizing, and cleaning those data.	
Conducting analyses/reporting: Conducting analyses (e.g., descriptive analytics, predictive modeling) and creating the associated reporting for decision support. Include time spent	

communicating and presenting information/studies, and creating/maintaining dashboards and websites that house Office reports/information.	
Institutional effectiveness activities: Include working on assessment and reporting, or other evaluative activities, for administrative and support units/areas like student affairs, finance and administration, research, and advancement. Include the development/management of IE-related resources/training materials.	
Assessment activities: Includes working with academic/educational programs on assessment and reporting on student learning outcomes (planning, conducting, and consulting). Include academic program reviews and the development/management of assessment-related resources/training materials (e.g., student learning outcomes, curriculum maps).	
Accreditation activities: Include coordination of reports for regional/specialized accreditors, maintenance of data in support of accreditation, and management of the accreditation process. Also include the development/management of accreditation-related resources/training materials.	
Strategic planning activities: Include coordination of the planning process, development/monitoring of performance metrics. Include work in supporting both institutional and unit-level planning and the development/management of planning-related resources/training materials.	
Improving stakeholder data literacy: Include coaching, consulting, and/or teaching others to better use data to inform decision making through activities like one-on-one conversations, workshops, and/or intensive educational experiences.	
Data governance/policy: Include activities like participating in data governance and policy development.	
Technology: Include activities like management of Office hardware/software, programming, website design/management, and data warehousing.	
Professional development: Include activities to develop/expand your personal knowledge and skills (e.g., attending in-person/online courses, conferences, workshops, watching webinars/tutorials).	
Attending meetings, administrative activities, office management: Include time spent attending meetings (e.g., staff/committee meetings, regional/state/system meetings). Include time on administrative activities (e.g., managing calendars, sending emails, organizing travel, paying bills). Include time managing the office (e.g., hiring/mentoring staff, employee grievances, managing the budget, vendor management).	
Other	

If you indicated other tasks above, please describe those tasks: _____

What is your relationship with the following senior-leader cabinets?

	I am a member of the cabinet	I am not a member but attend as needed	I am not a member and do not attend	The cabinet does not exist
President/CEO cabinet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provost/CAO cabinet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Chief Data Officer

Are you the institution's Chief Data Officer (or equivalent position)? The Chief Data Officer (CDO) is a senior executive responsible for overseeing the management, governance, and utilization of data.

NOTE: This is a required question.

- Yes, I am the CDO (or equivalent position); I have the official title and position.
- Yes, I am the de facto CDO (I am unofficially recognized as the CDO but do not have the formal title/position).
- No, but the institution has this position
- No and the institution does not have this position
- I don't know

BRANCH IF YES, IS THE OFFICIAL CDO

Prior to serving as the CDO (or equivalent position), which of the following apply to you? Please choose all that apply.

- I served as the Director of IR/IE at this institution
- I served as the Director of IR/IE at other institutions
- I worked in IT/technology at this institution
- I worked in IT/technology at other institutions
- I worked in IT/technology but not in higher education
- I worked in the field of data and analytics within higher education but outside of an Office of IR/IE
- I worked in the field of data and analytics but outside of higher education
- Other (please specify)

Please indicate your level of agreement. In my work as a Chief Data Officer, I am expected to:

	Strongly disagree	Moderately disagree	Neutral	Moderately agree	Strongly agree
Collaborate with stakeholders to ensure data-informed decision making.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensure the institution has the necessary resources to meet information demands.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coordinate and manage an institution-wide data strategy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coordinate and manage institutional data governance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Work to achieve institutional data integrity/quality.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensure data compliance standards are met.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facilitate data sharing/use across the institution.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Beyond these potential duties, briefly describe other primary responsibilities as a Chief Data Officer:

BRANCH IF YES DE FACTO

You indicated that you serve as the de facto CDO. Do you anticipate the institution will make this position/title official?

- Yes, within the next year
- Yes, within 1-3 years
- Yes, but more than 3 years from now
- No
- I don't know

Prior to serving as the de facto Chief Data Officer (or equivalent position), which of the following apply to you? Please choose all that apply.

- I served as the Director of IR/IE at this institution
- I served as the Director of IR/IE at other institutions
- I worked in IT/technology at this institution
- I worked in IT/technology at other institutions
- I worked in IT/technology but not in higher education
- I worked in the field of data and analytics within higher education but outside of an Office of IR/IE
- I worked in the field of data and analytics but outside of higher education
- Other (please specify)

Please indicate your level of agreement. In my work as the de facto Chief Data Officer, I am expected to:

	Strongly disagree	Moderately disagree	Neutral	Moderately agree	Strongly agree
Collaborate with stakeholders to ensure data-informed decision making.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensure the institution has the necessary resources to meet information demands.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coordinate and manage an institution-wide data strategy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coordinate and manage institutional data governance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Work to achieve institutional data integrity/quality.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensure data compliance standards are met.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facilitate data sharing/use across the institution.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Beyond these potential duties, briefly describe other primary responsibilities as de facto Chief Data Officer:

BRANCH IF NO BUT INSTITUTION HAS CDO ROLE

You indicated that your institution has a Chief Data Officer. We would like to gather information from them about their experiences as the CDO. Please provide their contact information:

- First Name:
- Last Name:
- Email Address:

BRANCH IF DOESN'T HAVE CDO ROLE

You indicated your institution does not have a Chief Data Officer (or equivalent position). Does your institution have plans to create this role?

- Yes, within the next year
- Yes, within the next 2-3 years
- Yes, within the next 4-5 years
- No
- I don't know

END BRANCH

Section 3. Office Structure

Office Reporting Structure

Please indicate the current division in which your Office is located for reporting purposes. Also please identify the ideal division (these data are confidential). *NOTE: ~80% of IR/IE Offices are currently in the President's or Provost's division.*

	Current Division	Ideal Division
President/Chief Executive Officer/Chancellor (or equivalent)	<input type="radio"/>	<input type="radio"/>
Provost/Chief Academic Officer/Vice President of Academic Affairs (or equivalent)	<input type="radio"/>	<input type="radio"/>
IR/IE/Planning (<i>ONLY select this option if this is a separate division</i>)	<input type="radio"/>	<input type="radio"/>
Administration Services	<input type="radio"/>	<input type="radio"/>
Finance/Operations/Business	<input type="radio"/>	<input type="radio"/>
Communications and Marketing	<input type="radio"/>	<input type="radio"/>
Institutional Advancement/Development or similar office	<input type="radio"/>	<input type="radio"/>
Enrollment Management/Admissions	<input type="radio"/>	<input type="radio"/>
Human Resources	<input type="radio"/>	<input type="radio"/>
Information Technology (IT)	<input type="radio"/>	<input type="radio"/>
Student Life/Student Affairs	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>

If you indicated "other" office, please identify that office:

Staffing Levels

Please indicate your level of agreement.

	Strongly disagree	Moderately disagree	Neutral	Moderately agree	Strongly agree
At our current staffing level, the Office can achieve its goals by never/rarely asking staff to work overtime.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
With additional staff, our Office could better meet institutional expectations for data and information.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our Office can recruit talented staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our Office can retain talented staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our Office can recruit a diverse staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our Office can retain a diverse staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our Office's hiring practices align with institutional expectations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

To meet current demand, what is your ideal staff FTE?	
What would your ideal staffing level be in three years (FTE), considering anticipated future demand?	

Remote Staff Policy

Which best describes your Office remote staff policy?

- Some/all staff can be fully remote
- Some/all staff can work remotely part of the time, but they are required to be in the office at least one day per week.
- All staff are required to work in-person at the Office, with remote work permitted only through special approval.
- Other (please specify)

Office Resources

Please indicate your level of agreement.

	Strongly disagree	Moderately disagree	Neutral	Moderately agree	Strongly agree	N/A
Senior Leaders value the work of the Office.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our Office is adequately funded to meet its operational needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our Office space is appropriate (NOTE: if your office is fully remote, please select "N/A")	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our Office's software/hardware is appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our Office's professional development/training opportunities are appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Over the past year, please indicate which professional development content your Office (you and/or your direct reports) participated in. Please choose all that apply.

- Data management
- Basic analytics (e.g., descriptive analytics)
- Advanced analytics (e.g., predictive analytics, prescriptive analytics)
- Software tools (e.g., Tableau, R, SPSS)
- Data literacy
- Data governance
- Data visualizations / communicating results
- Leadership/management (e.g., project management, budget management, staff mentoring)
- Technology-related content (e.g., programming, database, data warehouse)
- Generative artificial intelligence/AI
- Office does not provide professional development
- Other (please specify)

Over the past year, please indicate which professional development activities your Office (you and/or your direct reports) participated in. Please choose all that apply.

- Attended the AIR Forum (annual conference)
- Attended a state or regional IR/IE/Assessment/Planning conference
- Attended a non-IR/IE/Assessment/Planning conference
- Attended live webinars/watched recorded webinars
- Watched recorded tutorials
- Enrolled in online courses (e.g., AIR, LinkedIn Learning)
- Enrolled in vendor training (e.g., Tableau, Microsoft)
- Read journals/papers
- Office does not provide professional development
- Other (please specify)

Contribution to Institutional Improvement

Please indicate your level of agreement with the following statements. Our Office:

	Strongly disagree	Moderately disagree	Neutral	Moderately agree	Strongly agree
Contributes directly or indirectly to overall student success.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contributes directly or indirectly to equitable student success.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Collaborates with colleagues across the institution in support of student success.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provides educational opportunities or coaching to enhance the data literacy of institutional stakeholders.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Describe how your office contributes to student success. _____

Describe one way that your office contributes to data literacy of its stakeholders (e.g., hosts workshops, outreach), if at all. ___

Section 4: Staffing the Office

Staff Headcount

Direct Reports: How many people (headcount) report to you regardless of their employment status (full-time, part-time)? If a position is temporarily vacant, please consider the person who previously filled that role. Do not count yourself or faculty associates. NOTE: This is a required question.

BRANCH IF 0 (SINGLE PERSON OFFICE) – BRANCH TO FACULTY ASSOCIATES

BRANCH IF 1 OR MORE (HAVE DIRECT REPORTS) – CONTINUE WITH THIS SECTION

What is the headcount of your direct reports by gender identity? *NOTE: This headcount must equal the number provided earlier.*

Women	
Men	
Another gender	
Gender option is not provided	
Identity is unknown or they have chosen not to disclose their identity	

What is the headcount of your direct reports by race/ethnicity? *NOTE: This headcount must equal the number provided earlier.*

American Indian or Alaska Native	
Asian	
Black or African American	
Hispanic or Latino/a	
Middle Eastern or North African (for example, Lebanese, Iranian, Egyptian, Syrian, Moroccan, Algerian, etc.)	
Native Hawaiian or Pacific Islander	
White	
Bi/Multiracial	
Race/ethnicity does not have an option provided	
Race/ethnicity is unknown or who have not disclosed	

What is the headcount of your direct reports by their highest degree earned? *NOTE: This headcount must equal the number provided earlier.*

Baccalaureate degree or lower	
Master's degree/Specialist (M.A., M.S., Ed.S.)	
Doctoral degree, including professional practice doctorates (e.g., Ph.D., Ed.D., M.D., J.D.)	
Highest degree is unknown	

Staff Roles, FTE, and Salary

In the following set of questions, we will ask you to categorize each of your direct reports into one of the following roles (if a role is currently vacant, please consider the person who previously filled that role):

- Senior Associate Director/Associate Director/Assistant Director
- Junior and/or Senior Analysts: Primarily responsible for data collection, analysis, and reporting.
- Junior and/or Senior Assessment Staff: Primarily responsible for assessment, accreditation, and planning support.
- Technical Staff: Primarily responsible for database management, website design, and writing queries.
- Administrative Support Staff: Primarily responsible for administrative tasks.
- Undergraduate and/or Graduate Student Staff

In smaller IR/IE Offices, staff often play multiple roles (e.g., analyst, assessment, technical, administrative support). For this survey, ***DO NOT DOUBLE COUNT*** staff. Please assign each staff member to only one category; choose the category that aligns with their primary duties or aligns with their HR designation.

Does your Office employ a Senior Associate Director, Associate Director, and/or an Assistant Director? Answer “Yes” even if role(s) is temporarily vacant. NOTE: This is a required question.

- Yes
- No

BRANCH IF YES, ELSE BRANCH TO NEXT ROLE

Senior Associate Director, Associate Director, and/or an Assistant Director: Please estimate the following information.

- Vacant Role: If the position is temporarily vacant, consider the last person who filled that position.
- Total FTE (full-time equivalent): Total FTE = FTE from full-time employees + FTE for part-time employees. FTE from part-time roles is the number of hours they work per week divided by 40. For example: if 3 part-time employees work a total of 50 hours per week then they count as 1.25 FTE ($50 \div 40 = 1.25$ FTE).

	Senior Associate Director	Associate Director	Assistant Director
Total FTE (full-time equivalent)			
Estimate the average number of hours worked per week - Do not count vacation or other paid time off. If multiple people are in these roles, please average.			
Estimate the average annual salary/wage. Do not include bonuses or benefits (e.g., healthcare, retirement). Leave blank if you don't know.			

Are the annual salary/wage for these roles aligned with their experience, education, and work effort?

	Senior Associate Director	Associate Director	Assistant Director
Yes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do not have this role	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I don't know their salary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you believe a salary/wage is too low or too high, what factors might be contributing?

END BRANCH

Does your Office employ Junior and/or Senior Analysts? Answer “Yes” even if role(s) is temporarily vacant. NOTE: This is a required question.

- Yes
- No

BRANCH IF YES, ELSE BRANCH TO NEXT ROLE

Junior and/or Senior Analytical Staff: Please estimate the following information.

- Junior Analysts: Typically perform entry-level analytical tasks as team members/coordinators or with monitoring by Office leadership.
- Senior Analysts: Typically perform higher-level analytical tasks as project leaders or with minimal oversight by Office leadership.
- Vacant Role: If the position is temporarily vacant, consider the last person who filled that position.
- Total FTE (full-time equivalent): Total FTE = FTE from full-time employees + FTE for part-time employees. FTE from part-time roles is the number of hours they work per week divided by 40. For example: if 3 part-time employees work a total of 50 hours per week then they count as 1.25 FTE ($50 \div 40 = 1.25$ FTE).

	Junior Analysts	Senior Analysts
Total FTE (full-time equivalent)		
Estimate the average number of hours worked per week - Do not count vacation or other paid time off. If multiple people are in these roles, please average.		
Estimate the average annual salary/wage. Do not include bonuses or benefits (e.g., healthcare, retirement). Leave blank if you don't know.		

Are the annual salary/wage for these roles aligned with their experience, education, and work effort?

	Junior Analysts	Senior Analysts
Yes	<input type="radio"/>	<input type="radio"/>
No	<input type="radio"/>	<input type="radio"/>

Do not have this role	<input type="radio"/>	<input type="radio"/>
I don't know their salary	<input type="radio"/>	<input type="radio"/>

If you believe a salary/wage is too low or too high, what factors might be contributing?

END BRANCH

Does your Office employ Junior and/or Senior Assessment Staff? Answer “Yes” even if role(s) is temporarily vacant. NOTE: This is a required question.

- Yes
- No

BRANCH IF YES, ELSE BRANCH TO NEXT ROLE

Junior and/or Senior Assessment Staff: Please estimate the following information.

- Junior Assessment Staff: Typically perform entry-level assessment tasks (e.g., survey design/analysis, assessment, accreditation support) as team members/coordinators, or with monitoring by Office leadership.
- Senior Assessment Staff: Typically perform higher-level assessment tasks like working with faculty as project leaders or with minimal oversight by Office leadership.
- Vacant Role: If the position is temporarily vacant, consider the last person who filled that position.

Total FTE (full-time equivalent): Total FTE = FTE from full-time employees + FTE for part-time employees. FTE from part-time roles is the number of hours they work per week divided by 40. For example: if 3 part-time employees work a total of 50 hours per week then they count as 1.25 FTE (50 ÷ 40 = 1.25 FTE).

	Junior Assessment Staff	Senior Assessment Staff
Total FTE (full-time equivalent)		
Estimate the average number of hours worked per week - Do not count vacation or other paid time off. If multiple people are in these roles, please average.		
Estimate the average annual salary/wage. Do not include bonuses or benefits (e.g., healthcare, retirement). Leave blank if you don't know.		

Are the annual salary/wage for these roles aligned with their experience, education, and work effort?

	Junior Assessment Staff	Senior Assessment Staff
Yes	<input type="radio"/>	<input type="radio"/>
No	<input type="radio"/>	<input type="radio"/>
Do not have this role	<input type="radio"/>	<input type="radio"/>
I don't know their salary	<input type="radio"/>	<input type="radio"/>

If you believe a salary/wage is too low or too high, what factors might be contributing?

END BRANCH

Does your Office employ (or share) Technical Staff? Answer “Yes” even if that role is temporarily vacant. NOTE: This is a required question.

Technical staff are primarily dedicated to technical work related to the Office’s work (e.g., data warehouse, database management, website design/management, writing queries, managing software/hardware). Include even if you share support with other offices/units. *NOTE: Do not count staff who have been counted earlier.*

- Yes
- No

BRANCH IF YES, ELSE BRANCH TO NEXT ROLE

Technical Staff: Please estimate the following information.

- **Shared Support:** If you share Technical Staff with another office, please estimate the total FTE devoted to your Office (e.g., if you share equally with another office, their FTE might be 0.5)
- **Vacant Role:** If the position is temporarily vacant, consider the last person who filled that position.
- **Total FTE (full-time equivalent):** Total FTE = FTE from full-time employees + FTE for part-time employees. FTE from part-time roles is the number of hours they work per week divided by 40. For example: if 3 part-time employees work a total of 50 hours per week then they count as 1.25 FTE ($50 \div 40 = 1.25$ FTE).

Total FTE (full-time equivalent)	
Estimate the average number of hours worked per week - Do not count vacation or other paid time off. If multiple people are in these roles, please average.	
Estimate the average annual salary/wage. Do not include bonuses or benefits (e.g., healthcare, retirement). Leave blank if you don't know.	

Is the annual salary/wage for this role aligned with their experience, education, and work effort?

- Yes
- No
- I don’t know their salary/wage

If you believe a salary/wage is too low or too high, what factors might be contributing?

END BRANCH

Does your Office employ (or share) Administrative Support Staff? Answer “Yes” even if role is temporarily vacant. NOTE: This is a required question.

Administrative support staff are primarily responsible for administrative tasks like office organization, travel arrangements, customer service, scheduling, and meeting/event support. Include even if you share support with other offices/units. *NOTE: Do not count staff who have been counted earlier.*

- Yes
- No

BRANCH IF YES, ELSE BRANCH TO NEXT ROLE

Administrative Support Staff: Please estimate the following information.

- Shared Support: If you share Administrative Support Staff with another office, please estimate the total FTE devoted to your Office (e.g., if you share equally with another office, their FTE might be 0.5)
- Vacant Role: If the position is temporarily vacant, consider the last person who filled that position.
- Total FTE (full-time equivalent): Total FTE = FTE from full-time employees + FTE for part-time employees. FTE from part-time roles is the number of hours they work per week divided by 40. For example: if 3 part-time employees work a total of 50 hours per week then they count as 1.25 FTE ($50 \div 40 = 1.25$ FTE).

Total FTE (full-time equivalent)	
Estimate the average number of hours worked per week - Do not count vacation or other paid time off. If multiple people are in these roles, please average.	
Estimate the average annual salary/wage. Do not include bonuses or benefits (e.g., healthcare, retirement). Leave blank if you don't know.	

Is the annual salary/wage for this role aligned with their experience, education, and work effort?

- Yes
- No
- I don't know their salary/wage

If you believe a salary/wage is too low or too high, what factors might be contributing?

END BRANCH

Does your Office employ Undergraduate or Graduate Student Staff? Answer "Yes" even if role(s) is temporarily vacant. NOTE: This is a required question.

- Yes
- No

BRANCH IF YES, ELSE BRANCH TO FACULTY ASSOCIATES

Undergraduate or Graduate Student Staff Please estimate the following information.

- Vacant Role: If the position is temporarily vacant, consider the last person who filled that position.

- Total FTE (full-time equivalent): Total FTE = FTE from full-time employees + FTE for part-time employees. FTE from part-time roles is the number of hours they work per week divided by 40. For example: if 3 part-time employees work a total of 50 hours per week then they count as 1.25 FTE ($50 \div 40 = 1.25$ FTE).

	Undergraduate student staff	Graduate student staff
Total FTE (full-time equivalent)		
Estimate the average number of hours worked per week - Do not count vacation or other paid time off. If multiple people are in these roles, please average.		
Estimate the average annual salary/wage. Do not include bonuses or benefits (e.g., healthcare, retirement). Leave blank if you don't know.		

Are the annual salary/wage for these roles aligned with their experience, education, and work effort?

	Undergraduate student staff	Graduate student staff
Yes	<input type="radio"/>	<input type="radio"/>
No	<input type="radio"/>	<input type="radio"/>
Do not have this role	<input type="radio"/>	<input type="radio"/>
I don't know their salary/wage	<input type="radio"/>	<input type="radio"/>

If you believe a salary/wage is too low or too high, what factors might be contributing?

END BRANCH

Faculty Associates

Some IR/IE Offices supplement staff with faculty associates that contribute to the Office's work.

Does your Office typically have faculty associates? Answer "Yes" even if that role is temporarily vacant. NOTE: This is a required question.

- Yes
- No

BRANCH IF YES, ELSE BRANCH TO SECTION 4

Faculty Associates: Please estimate the following information.

How many faculty associates does your Office typically have (headcount)?	
How many hours per week (on average) does a faculty associate typically contribute to your Office? Do not count vacation or other paid time off.	

END BRANCH

Section 5: Office Work Output and Stakeholders

Office Work Output

Thinking about the work output produced by the Office (e.g., reports, websites, products), estimate the percentage devoted to each major category.

- Do NOT count work tasks like service to the institution/profession, administrative tasks, or related tasks; only consider work output.
- Enter values from 0 to 100 (integers).
- Some tasks may not apply to your Office. In that case, please enter a zero (“0”)
- The total allocation of time must be 100%.

Compliance reporting (e.g., IPEDS, federal/state-mandated reporting)	
Non-compliance reporting (e.g., Factbook, Common Data Set, surveys)	
Providing reports/information for institution-level decision support (e.g., factors contributing to graduation/completion, enrollment projections, student financial aid modeling, student learning outcomes dashboards)	
Providing reports/information for program/division-level decision support (e.g., program-level enrollment, retention/completion rates)	
Institutional data governance	
Improving institutional data literacy	
Business intelligence (BI) activities (e.g., analyses for business/operational/strategic decisions)	
Institutional effectiveness activities (e.g., working on outcomes for administrative and academic/student support services like student affairs, finance and administration, research, advancement). Include the development/management of IE-related resources/training materials).	
Assessment activities (e.g., working with educational programs on assessment and reporting on student learning outcomes). May include academic program reviews. Include the development/management of assessment-related resources/training materials (e.g., student learning outcomes, curriculum maps).	
Accreditation activities (e.g., coordination of reports for regional/specialized accreditors, maintenance of data in support of accreditation, management of the accreditation process). Please exclude assessment activities which are listed separately. Also include the development/management of accreditation-related resources/training materials.	
Strategic planning activities (e.g., coordination of the planning process, development of performance metrics, monitoring of performance). Include work in supporting both institutional and unit-level planning. Also include the development/management of planning-related resources/training materials.	
Other work output produced	

If you indicated other work output produced, please describe that work output (please do not include tasks like service to the institution/profession, administrative tasks, meetings, etc.): _____

Please estimate the percentage of the institution's total amount of work output completed by the Office.

	Little to none	About 25%	About 50%	About 75%	Most/all	Work does not exist
Compliance reporting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-compliance reporting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Providing reports/information for institution-level decision support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Providing reports/information for program/division-level decision support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutional data governance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving institutional data literacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business intelligence activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutional effectiveness activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accreditation activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic planning activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Serving Stakeholders

Place in rank order the top 5 stakeholders of Office products (e.g., analytics, reports, dashboards).

- Senior leadership offices (e.g., president/chief executive officer, provost/chief academic officer)
- Academic colleges/departments
- Academic support units (e.g., academic advising, library, tutoring)
- Advancement/external relations units (e.g., alumni relations, development, communications and marketing)
- Athletics
- Diversity, equity, inclusion units/efforts
- Enrollment management units (e.g., admissions, registrar, awards/scholarships)
- External entities or organizations (e.g., accreditors, system/district, federal/state government)
- Finance and business units (e.g., finance, human resources, facilities)
- Other data and analytics units (e.g., institutional effectiveness, assessment, planning, business intelligence)
- Research units (e.g., grants/contracts, institutional review board, research centers)
- Student health/wellness units (e.g., counseling, health services, fitness centers)
- Student involvement units (e.g., fraternity/sorority life, student activities, club sports, housing/residence life)
- Student services/support (e.g., financial aid, career services, veteran's services)
- Technology-related units (e.g., IT)

Place in rank order the top 5 stakeholders of Office coaching services (e.g., helping stakeholders develop requests, improving stakeholders' data literacy).

- Senior leadership offices (e.g., president/CEO, provost/chief academic officer)
- Academic colleges/departments

- Academic support units (e.g., academic advising, library, tutoring)
- Advancement/external relations units (e.g., alumni relations, development, communications and marketing)
- Athletics
- Diversity, equity, inclusion units/efforts
- Enrollment management units (e.g., admissions, registrar, awards/scholarships)
- External entities or organizations (e.g., accreditors, system/district, federal/state government)
- Finance and business units (e.g., finance, human resources, facilities)
- Other data and analytics units (e.g., institutional effectiveness, assessment, planning, business intelligence)
- Research units (e.g., grants/contracts, institutional review board, research centers)
- Student health/wellness units (e.g., counseling, health services, fitness centers)
- Student involvement units (e.g., fraternity/sorority life, student activities, club sports, housing/residence life)
- Student services/support (e.g., financial aid, career services, veteran’s services)
- Technology-related units (e.g., IT)

Section 6: Data Environment

For the following set of questions, please estimate the level of maturity of the Office and Institution’s data environment using this 4-point maturity scale:

- Not occurring: Practice does not exist currently
- Reactive: “Only as needed”. Practice is inconsistent and is in reaction to a crisis event.
- Proactive: Practice is consistent and predictable allowing for resource planning and management.
- Optimized: Practice is streamlined, productive, efficient, documented, and integrated.

Office Maturity Ratings

Please estimate the level of maturity of the Office on the following:

	Not occurring	Reactive	Proactive	Optimized	I don't know
Conducting basic analytics (e.g., descriptive statistics)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conducting advanced analytics (e.g., predictive, prescriptive)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conducting assessment projects.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using data ethically and responsibly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Managing data	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating effective data visualizations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating effective reports/communicating results	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meeting stakeholders’ needs for reports/information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Managing its projects/information requests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Managing its technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of generative AI	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Institutional Maturity Ratings – Data Culture

Please estimate the level of maturity of the institution on the following metrics (NOTE: The term “employees” refers to institutional senior leaders, administrators, faculty, and staff):

	Not occurring	Reactive	Proactive	Optimized	I don't know
Institution uses reports/information to improve student outcomes (e.g., retention rates, completion rates).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees know when reports/information should be used for decision making (i.e., data strategy).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institution effectively changes and progresses as an organization (i.e., change management).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Senior leaders value transparency regarding reports/information (i.e., reports are shared regardless of whether they reflect good or bad news)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institution’s culture is to use reports/information to inform decisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees’ use of generative AI.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Institutional Maturity Ratings – Data Governance

Please estimate the level of maturity of the institution on the following metrics (NOTE: The term “employees” refers to institutional senior leaders, administrators, faculty, and staff):

	Not occurring	Reactive	Proactive	Optimized	I don't know
Institutional data is kept private.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutional data are kept secure.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutional data is well managed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institution collects high-quality data.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees follow procedures to ensure data is collected correctly (e.g., data entry procedures, data cleaning procedures).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IR/IE Office has access to data necessary to produce its work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institution meets stakeholders’ needs for reports/information for decision making.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institution produces high-quality reports/information appropriate for use by all levels and roles of its employees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Institutional Maturity Ratings – Data Literacy

Please estimate the level of maturity of the institution on the following metrics (NOTE: The term “employees” refers to institutional senior leaders, administrators, faculty, and staff):

	Not occurring	Reactive	Proactive	Optimized	I don't know
Employees understand institutional reports/information.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees use reports/information to inform their decisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Employees use reports/information ethically and responsibly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Institutional Maturity Ratings – Institutional Effectiveness

Please estimate the level of maturity of the institution on the following metrics (NOTE: The term “employees” refers to institutional senior leaders, administrators, faculty, and staff):

	Not occurring	Reactive	Proactive	Optimized	I don't know
Institution has an ongoing systematic process for institutional effectiveness and assessment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institution fosters a culture of using assessment results to improve administrative and support units/areas outcomes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institution fosters a culture of using assessment results to improve student learning outcomes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees are familiar with the purpose, process, and outcomes of institutional accreditation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institution has an ongoing systematic process for strategic planning.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>