



Data-Driven Integrated Planning: Methodologies in Action

IHE 2022, September 27, 2022, 2:00 - 3:00 PM EST

Agenda

- Introductions
- Integrated Planning and its role in higher education today
- Designing an Integrated Planning process
 - Challenges to creating efficiency
- Role of technology in Integrated Planning
- Next Steps
- Q & A

Today's Panelists

Christopher Davis

Vice President of Academic Services
and Quality, University of Maryland
Global Campus



Douglas Masterson

Senior Associate Provost for
Institutional Effectiveness, University
of Southern Mississippi



Moderator: Suzanne Carbonaro, Director of Academic Partnerships, HelioCampus

UMGC Enrollment



More than **95 percent** of enrollments are either online or in a hybrid format.

Fiscal Year 2020



90,661
students
enrolled



13,845
degrees and
certificates
awarded



332,069
course
enrollments

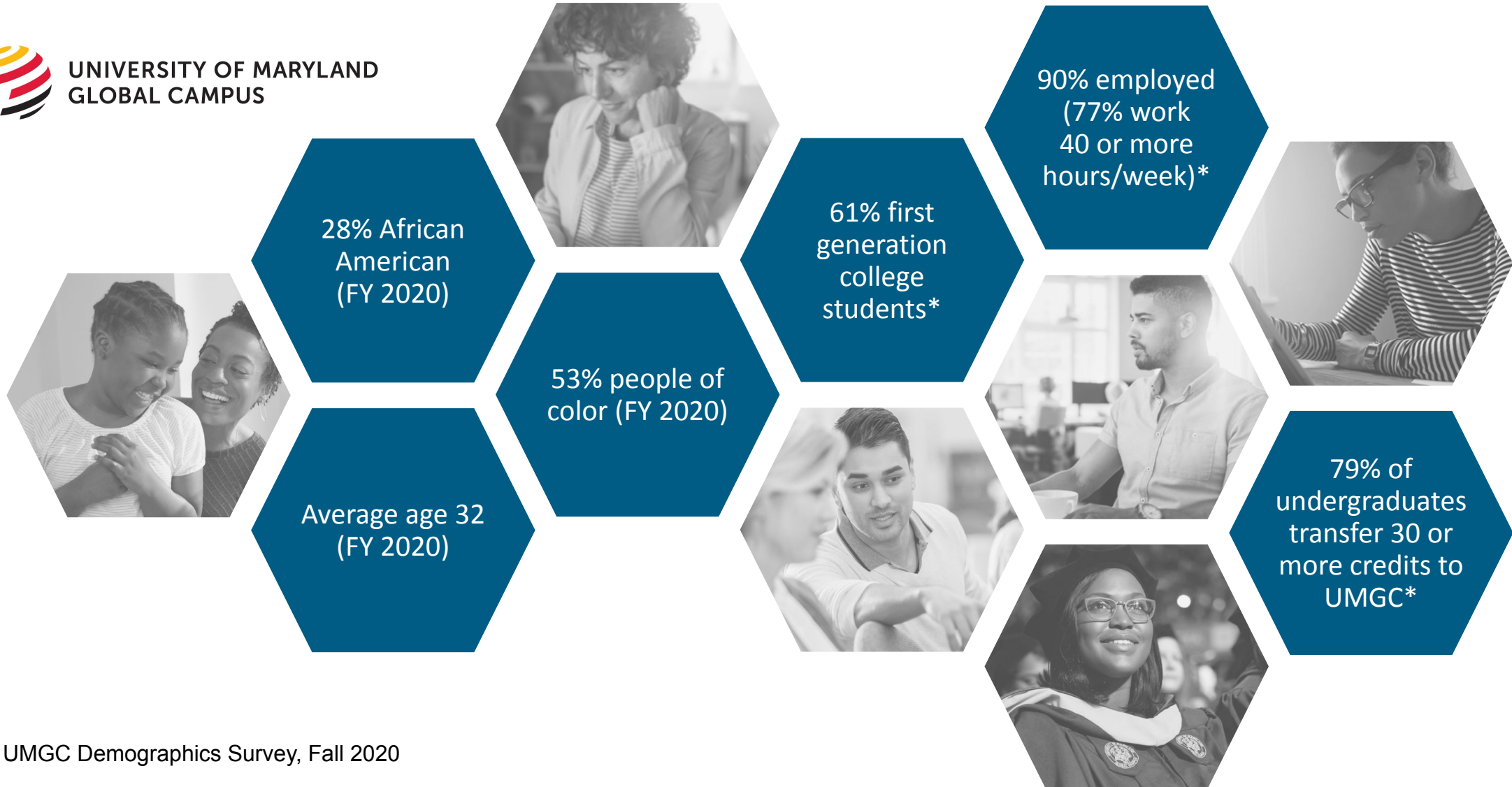
UMGC Locations



**175+ worldwide
classroom and
service locations**

including on military bases in more
than 20 countries and territories

Student Profile



* UMGC Demographics Survey, Fall 2020

USM Background

- Founded in 1910, The University of Southern Mississippi is a public, comprehensive research university (R1) located near the Gulf of Mexico, about 100 miles east of New Orleans.
- **Our fall 2021, enrollment includes 10,638 undergraduate students and 3,442 graduate students, both online and face-to-face.**
- We pride ourselves on balancing an exceptional, internationally known research profile with an emphasis on student-centered pedagogy and support, leveraging our unique context to accelerate the success of our diverse student body.
- We are one of eight public institutions of higher learning in a small state and, like many universities, face increasing budgetary challenges and a competitive environment for student recruitment.



Integrated Planning and its role in higher education today

“Higher education institution’s effort to organize evaluation, assessment, and improvement initiatives so the institution can determine how well it is fulfilling its mission and achieving its goals.”

IE Planning Can Cover:

1. Institutional research
2. Program review (academic and/or administrative)
3. Student learning outcome assessment
4. Accreditation
5. Plan measurement and decision support

Integrated Planning and its role in higher education today

Grand Challenges in Assessment

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Integrated Planning: The “Difference that Makes a Difference” in Institutional Effectiveness Over Time

Justin Hoshaw , Erin M. Isaacson , Ashli Grabau , Robert Wilkinson , Lina Di Genova ,

Megan Schramm-Possinger , Nicholas R. Santilli , Kimberly K. Daugherty , Michael Ben-Avie

assessment

integrated planning

institutional effectiveness



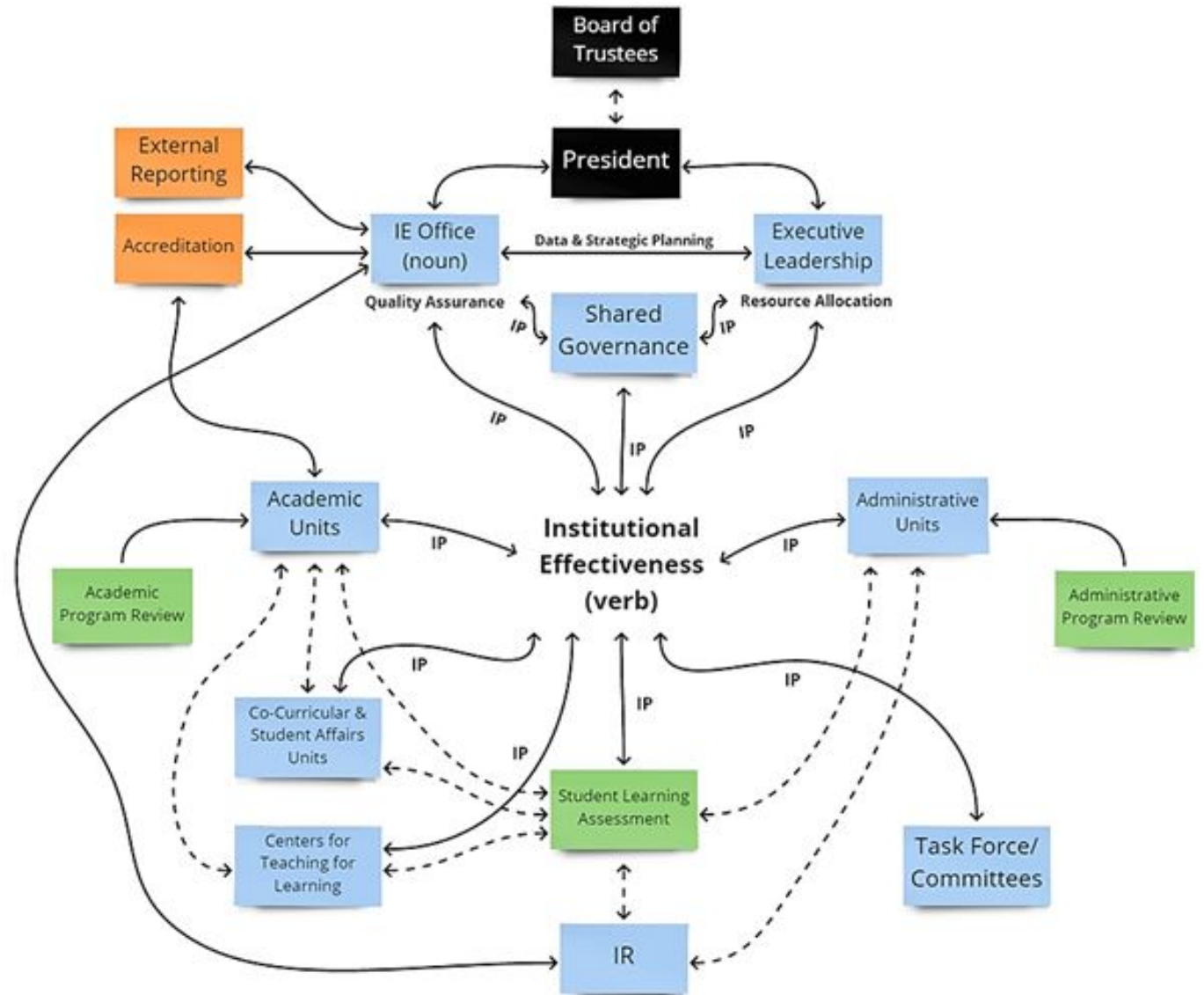
CC BY-4.0

IE as a:

- “noun” is part of the institutional infrastructure.
- “verb” is the act of demonstrating IE.

IE’s relationship to integrated planning reflects IE’s purpose as both a noun and a verb.

Integrated Institutional Effectiveness



Internal and External Pressures Impacting Institutional Effectiveness

Institutional Effectiveness Evolution Drivers

Accreditation Bodies Under Scrutiny

- Greater focus on financial sustainability
- Expanded focus on student learning outcomes

Institutional Requirements Expanding

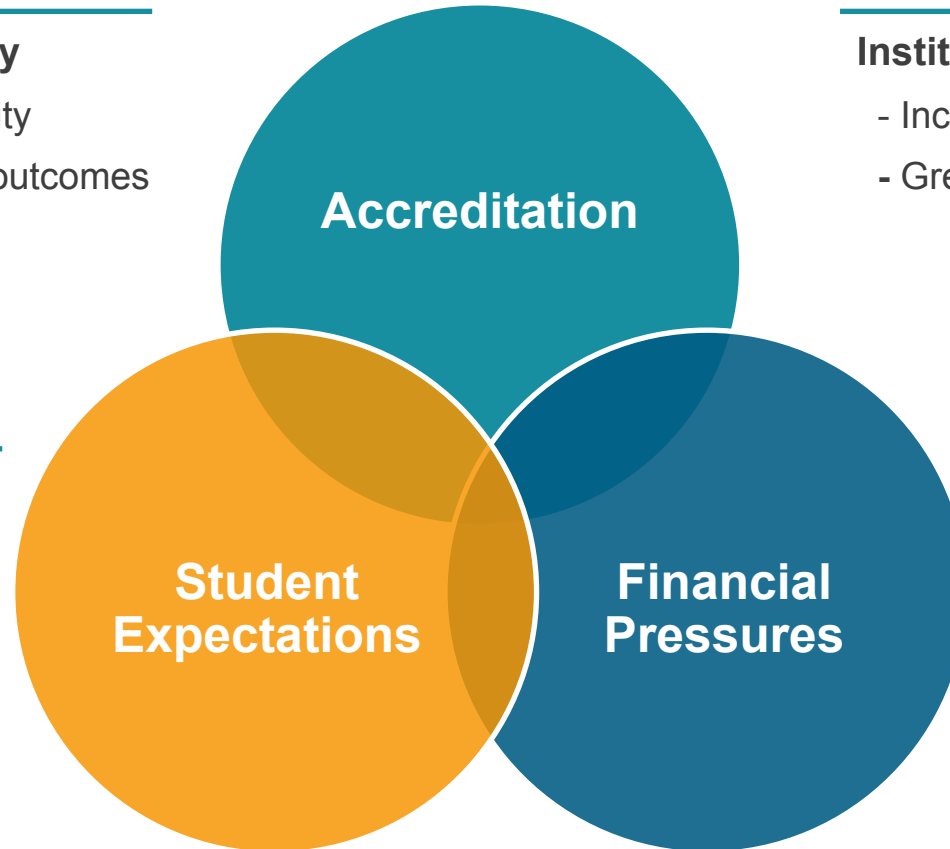
- Increased focus on continuous improvement
- Greater need for institutional data

Student Expectations

- ROI of Degree
- Skills Articulation

Cost Containment

- Increased Operating Costs
- Staffing Constraints
- COVID-19 Impact

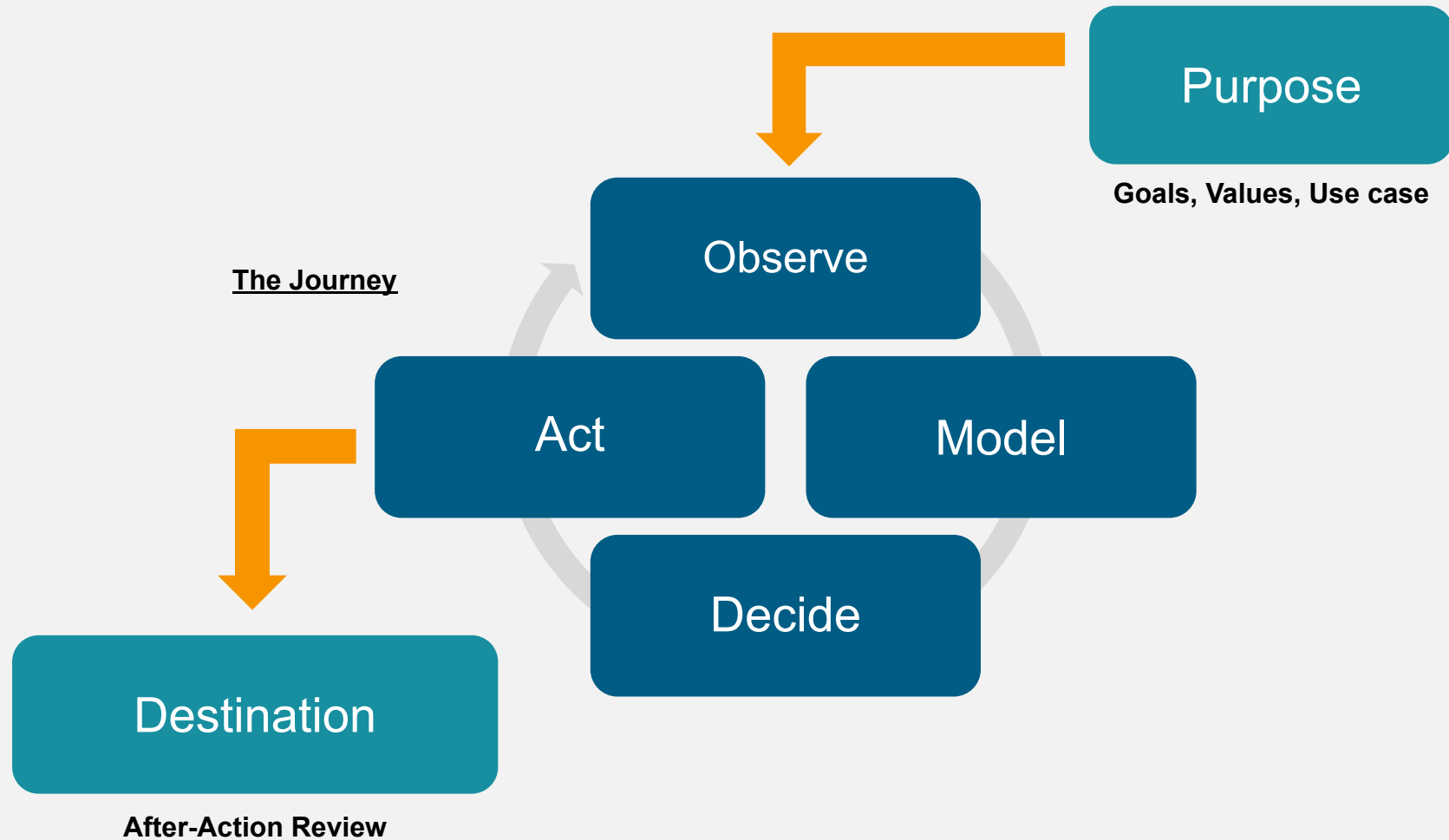


University of Maryland Global Campus

What was the integrated planning process like before you came to UMGC? And what changes to operational efficiency, and student learning have been impacted by your process?



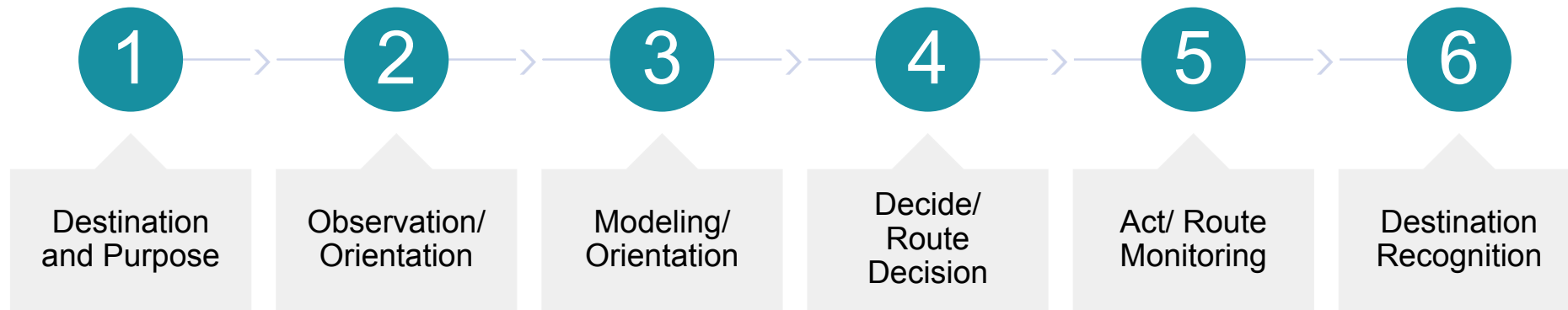
Integrated Planning = Agile Wayfinding



Integrated Planning = Agile Wayfinding

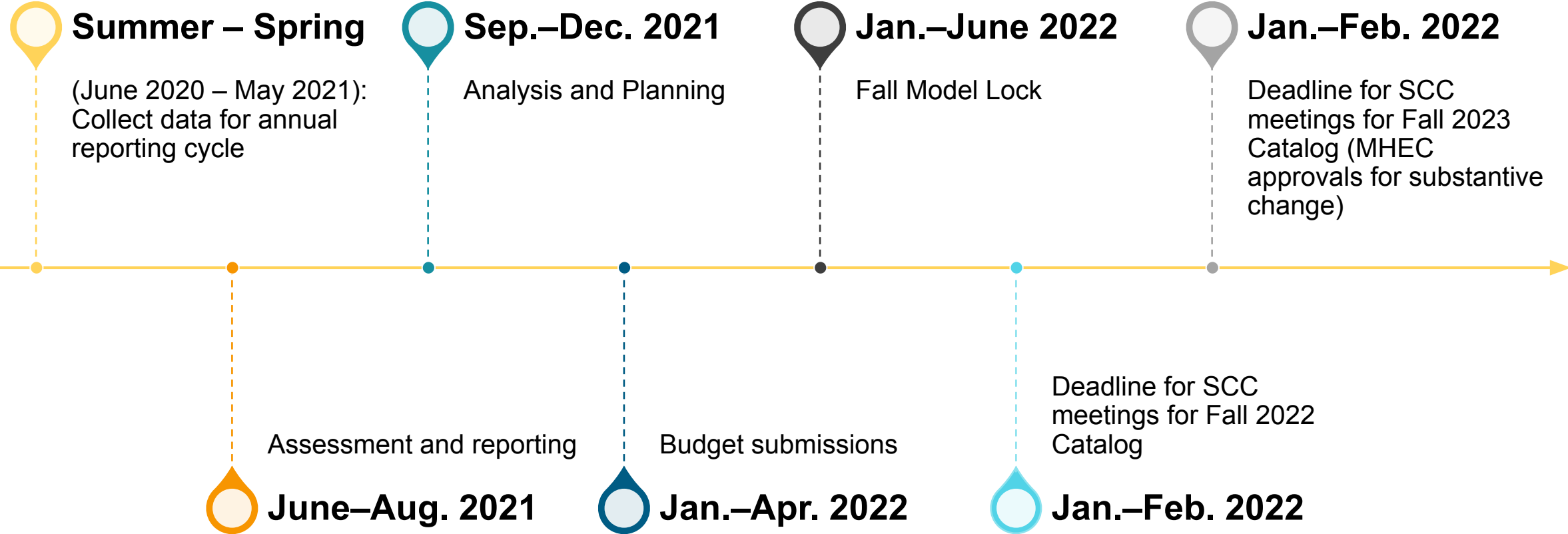
A planning process born from a university teach-out and repeated viewings of Moana.

“It’s called wayfinding, princess. It’s not just sails and knots, it’s seeing where you’re going in your mind. Knowing where you are by knowing where you’ve been.”



Steps can be aligned to meetings.
Meeting cadence controls speed of change.

Act: Integrated Planning Calendar



University of Southern Mississippi

What was the integrated planning process like before you came to USM? And what changes to operational efficiency, and student learning have been impacted by your process?



Cultivating Data-Grounded Leadership, 2018-2020

- **Restructuring Institutional Research**
 - Greater service-orientation and visibility on campus
 - Increased emphasis on analytics and data sharing
- **Creating expectations and accountability for leadership**
 - Peer data averages
 - Dashboard monitoring
- **Centering data in proposal processes**



How is University of Southern Mississippi using data to assess, manage and lead new structures?

PHASE I.

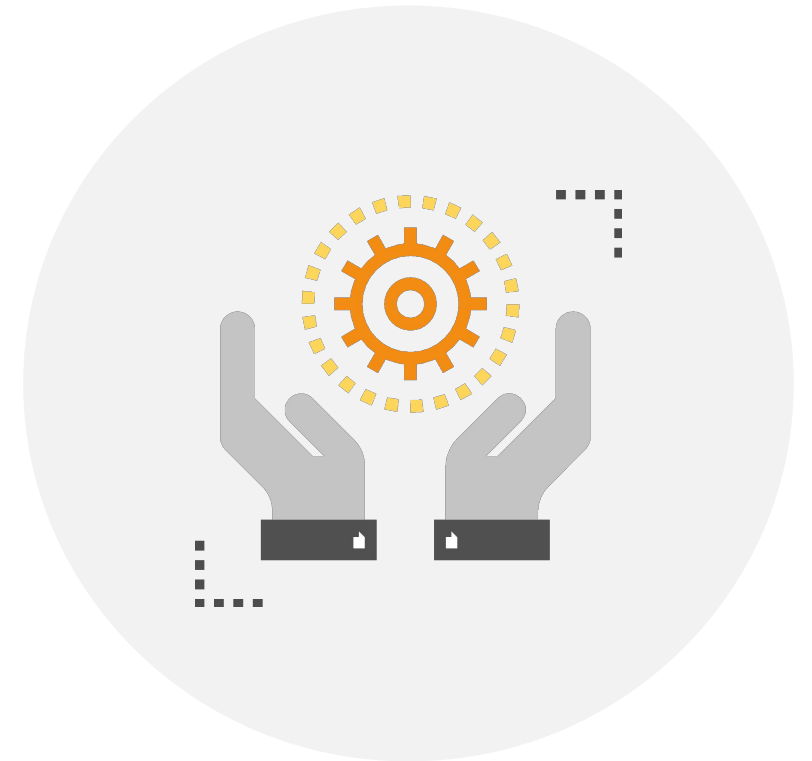
- **Introducing Key Performance Indicators**
 - Majors/Headcount/FTE
 - SCHs in and out of program courses
 - Degrees awarded
 - Retention/graduation metrics
 - Funding allocation by program
 - Discount rates
- **Establishing a norm of transparency**
- **Requiring data-grounded proposals and resource requests**



University of Southern Mississippi

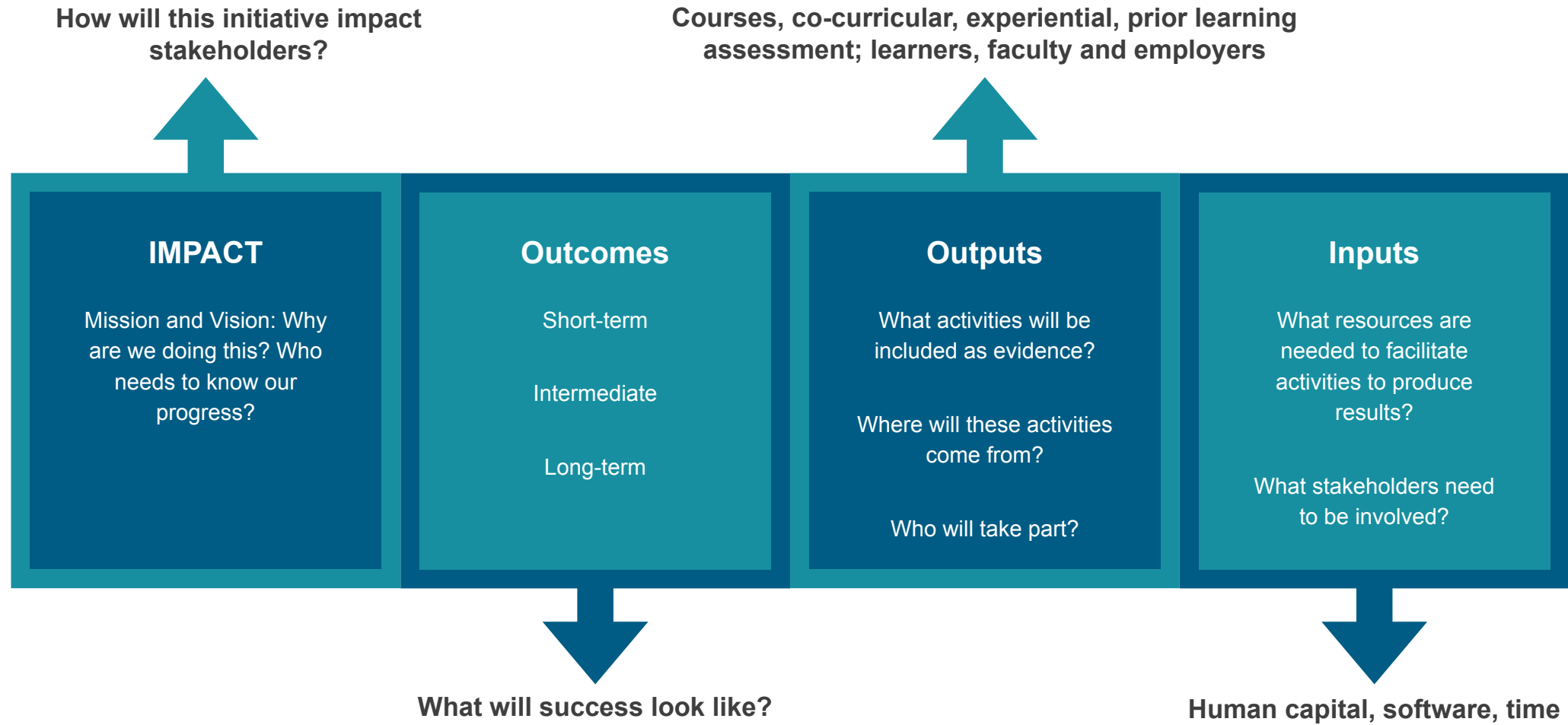
PHASE II.

- **Creating expectations and accountability for leadership**
 - Peer data averages
 - Dashboard monitoring
 - Data-informed conversations and decision-making (e.g., budget hearings)
- **Restructuring Institutional Research**
 - Greater service-orientation and visibility on campus
 - Increased emphasis on analytics and data sharing
- **Ex. Introducing analytics on class scheduling, demand, and accessibility**



Integrated Planning and Assessment Logic Model

Based on Assessment Logic Model (Finley, 2019)



Question 1

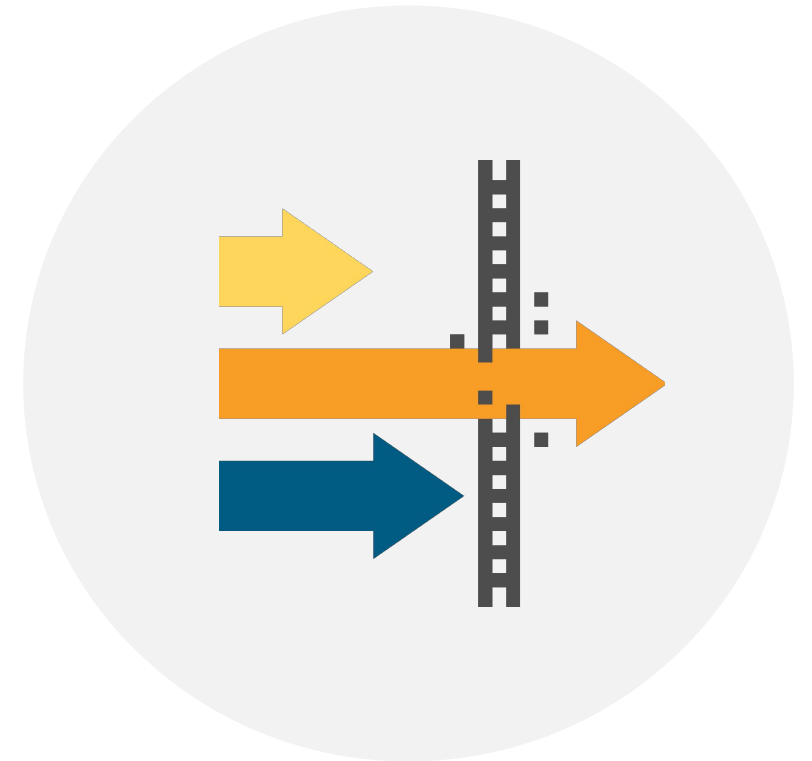
To what extent is your current planning process actionable?

- A. Process offers complete visibility into learning and operational efficiency
- B. Process offers some visibility into learning and operational efficiency
- C. Process is disjointed and does not provide access to meaningful data for all stakeholders
- D. Integrated planning? We don't do that.

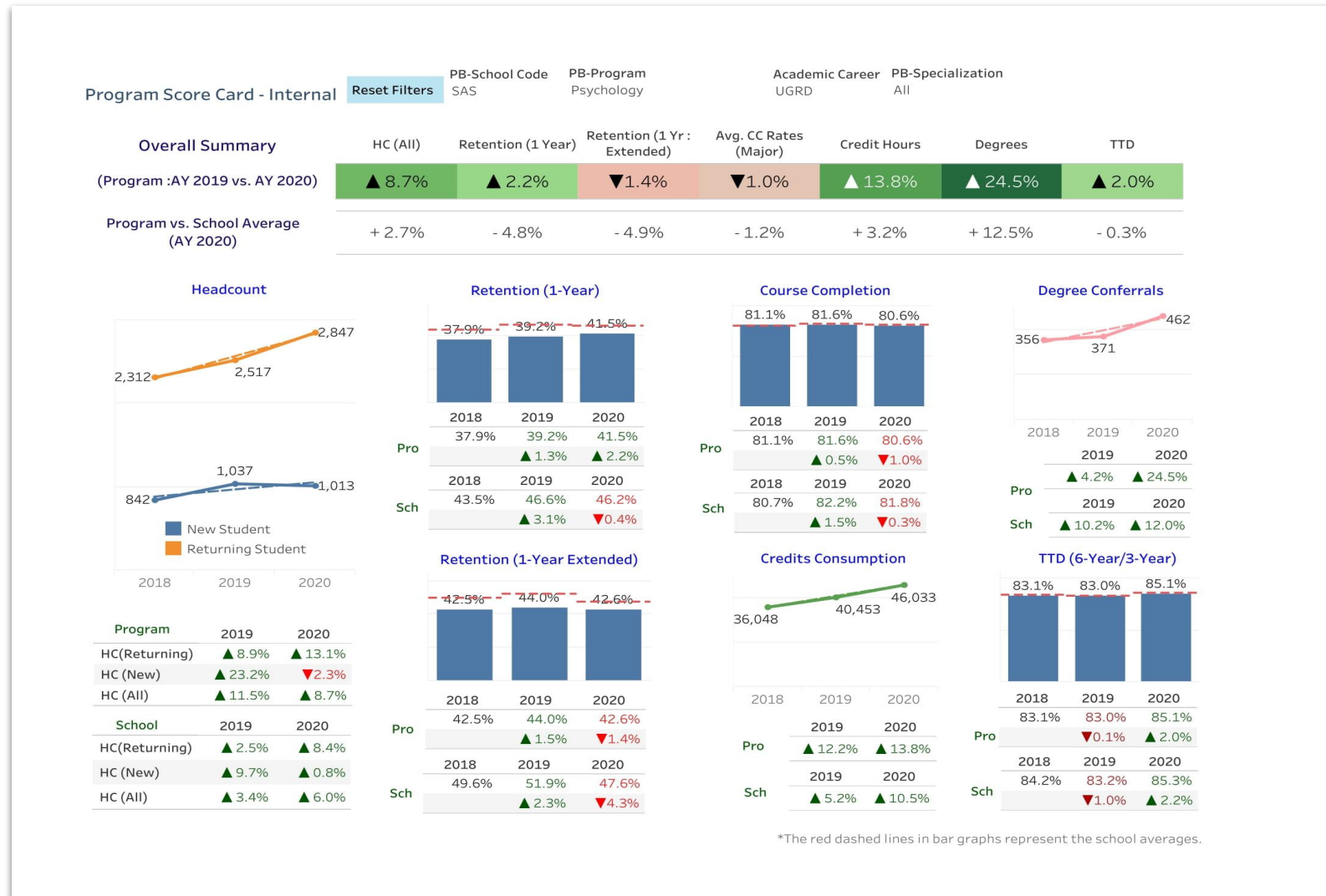


Challenges to Enabling Efficiency

How did you make barriers opportunities to unlock access to holistic data for improvement at UMGC?



UMGC Program Scorecard- Internal



UMGC Program Scorecard- External

Competitor Institutions (Online Degree Programs)				State	Top N Institutions			
CIP Title	Psychology, General			All	10			
Rank	Institution	School Type	State	Conterrals 2015	Conterrals 2019	Online Market Share 2015	Online Market Share 2019	Online Market Share Change
1	Florida International University	Public	FL	1,095	1,402	4.9%	5.9%	1.1%
2	University of Central Florida	Public	FL	1,164	1,182	5.2%	5.0%	-0.2%
3	Southern New Hampshire University	Private	NH	391	1,069	1.7%	4.5%	2.8%
4	Liberty University	Private	VA	1,327	1,033	5.9%	4.4%	-1.5%
5	University of Florida	Public	FL	486	473	2.2%	2.0%	-0.2%
6	University of Arizona	Public	AZ	496	472	2.2%	2.0%	-0.2%
7	Washington State University	Public	WA	351	446	1.6%	1.9%	0.3%
8	University of Maryland Global Campus	Public	MD	424	437	1.9%	1.8%	0.0%
9	Arizona State University-Skysong	Public	AZ	203	418	0.9%	1.8%	0.9%
10	Ashford University	For-Profit	CA	1,003	417	4.4%	1.8%	-2.7%

Total # of Institutions in Selected States in 2019	236	Selected Institutions	Conterrals 2015	Conterrals 2019	Online Market Share 2015	Online Market Share 2019	Online Market Share Change
UMGC Rank (2019)	8	UMGC	424	437	1.9%	1.8%	▲ 0.0%

Data Source : Burning Glass Program Insight

Job Demands—Skills linked to workforce

BS Psychology			Specialized Skills in Demand		
Skill	Projected Growth (2021-2026)	Avg(%)	Industrial-Organizational Psychologists	Psychologists, All Other	Social Science Research Assistants
Psychology	8.8%	42.3%	13.8%	71.4%	41.8%
Organizational Development	3.6%	15.1%	45.4%		
SPSS	7.7%	14.8%		4.4%	40.0%
Data Analysis	7.4%	14.6%	4.7%	4.4%	34.7%
Data Collection	4.7%	14.4%	2.9%	7.4%	32.9%
Scheduling	4.2%	13.8%	7.5%	17.5%	16.4%
Project Management	5.4%	13.7%	25.6%		15.4%
SAS	8.2%	12.4%			37.1%
Neuropsychology	4.6%	11.8%		35.5%	
Change Management	6.3%	9.7%	29.2%		
Customer Service	3.5%	9.0%	16.9%	6.3%	3.8%
Statistics	10.2%	8.9%		7.4%	19.2%
Statistical Analysis	7.6%	8.8%		7.4%	19.0%
R	9.4%	7.7%			23.2%
Economics	5.6%	7.4%	4.5%	3.5%	14.4%
Data Entry	1.0%	6.8%		7.7%	12.6%
Budgeting	5.3%	6.6%	12.5%		7.2%
STATA	7.3%	6.0%			18.1%
Leadership Development	4.8%	6.0%	18.0%		
Talent Management	5.5%	5.8%	17.3%		
Public Health and Safety	4.7%	5.6%			16.9%
Data Management	6.7%	5.6%			16.8%
Performance Management	4.2%	5.4%	16.3%		
Teaching	4.1%	5.1%	4.4%	6.8%	4.2%
SQL	8.5%	5.0%			15.1%
Test Administration	-29.2%	4.9%		14.6%	
Staff Management	5.6%	4.7%	5.3%	3.9%	4.9%
Training Programs	5.8%	4.7%	10.4%	3.6%	

Data Source : Burning Glass Program Insight

Where are we headed with our data model?



Behavior

- Funnel Behaviors
- NSC (1)

- Co-Curricular
- Student Learning
- Interactions
- In-Class Behavior
- Course Registration

- Employment
- NSC (2)
- Alumni Activity

Pre-Enrollment

Enrollment

Graduate/Alumni



Demographics & Attitudes

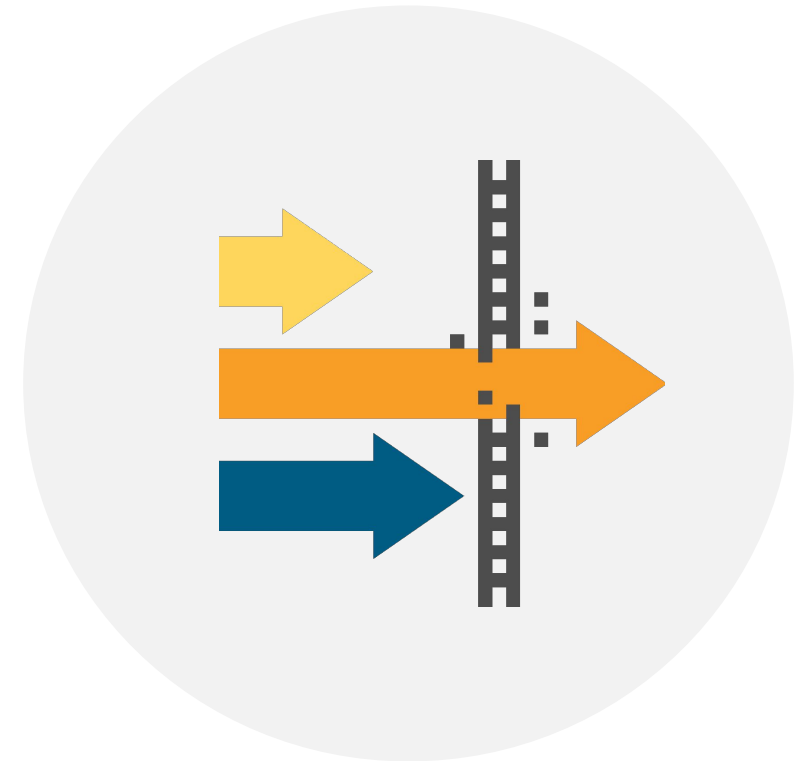
- Application (Demographics)

- Intake Survey
- Student Survey
- EOC Survey
- NL Survey
- Capstone Survey

- Grad Survey
- Alumni Survey

Challenges to Enabling Efficiency

How did you make barriers opportunities to unlock access to holistic data for improvement at USM?



INSTRUCTIONS

Data Dictionary

Note: Reports to which you have access will appear with blue text hyperlinked to the report. Reports in black text are those to which you do not have access.

Student Dashboard Links

 Academic Advisors	 Admissions	 Completions	 Course Analytics	 Course Success	 Enrollment Trends	 Financial Aid
 Graduate Assistants	 IPEDS	 Program Review	 Retention and Graduation	 USM Data Facts		

Finance Dashboard Links

 Aging	 Budget Vs Actuals	 Budget Forecast	 Institutional Aid Analysis	 Finance Reports	 Net Tuition Revenue
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Program Costing Links

 Budget Rubric	 Reassignment Investment	 Instructional Capacity	 KPI's	 Presidential Summary	 Program Costing	 Resource Allocation
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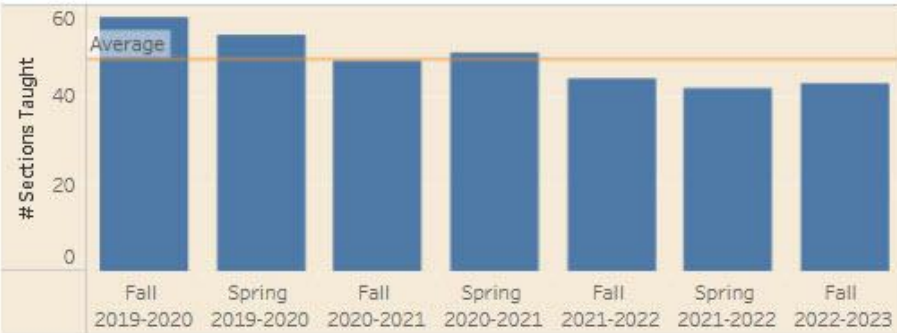


Instructional Analysis | Overview by Discipline | History Fall 2022-2023

Term: Fall 2022-2023 Discipline: History

Full Time Faculty	Part Time Faculty	Faculty FTE	Avg Sections / Faculty	Full Time Faculty < 4	Discipline FTE Req
16	2	17	2.6	13	11.25

Sections Taught by Faculty Groups: History



Comparison Taught by Faculty Type for Last 3 years



Distribution of Teaching Load Within Discipline or Outside Discipline

Discipline Match	Full-time Faculty Count	Part time Faculty Count	# Sections Taught	% of Total # Sections Taught along Table (Do..	Class Credit Value	Avg. Fill Rate
Within Discipline	16.0	2.0	40.0	88.89%	129.0	69.09%
Outside of Discipline	5.0	0.0	5.0	11.11%	13.0	74.69%
Grand Total	16.0	2.0	45.0	100.00%	142.0	69.73%

By Subject Summary Taught by Faculty in History

Class Discipline	Full-time Faculty Count	Part time Faculty Count	# Sections Taught	Class Credit Value	Avg. Fill Rate
History	16.0	2.0	40.0	129.0	69.09%
Honors	3.0	0.0	3.0	7.0	65.82%

Course Discipline Term Summary Requirements

Class Discipline	# Sections Taught	Class Credit Value	Avg. Fill Rate	FTE Requirement by..	FTE Requirement by..
History	40.0	129.0	69.09%	10.8	10.0
Honors	3.0	7.0	65.82%	0.6	0.8

Faculty location vs Class campus

Discipline	Faculty Location	Hattiesburg		Online		USM Gulf Coast	
		# Sections Taught	Percent of sections taught	# Sections Taught	Percent of sections taught	# Sections Taught	Percent of sections taught
History	Hattiesburg	41.00	89.1%	2.00	4.3%	3.00	6.5%
Grand Total		41.00	89.1%	2.00	4.3%	3.00	6.5%

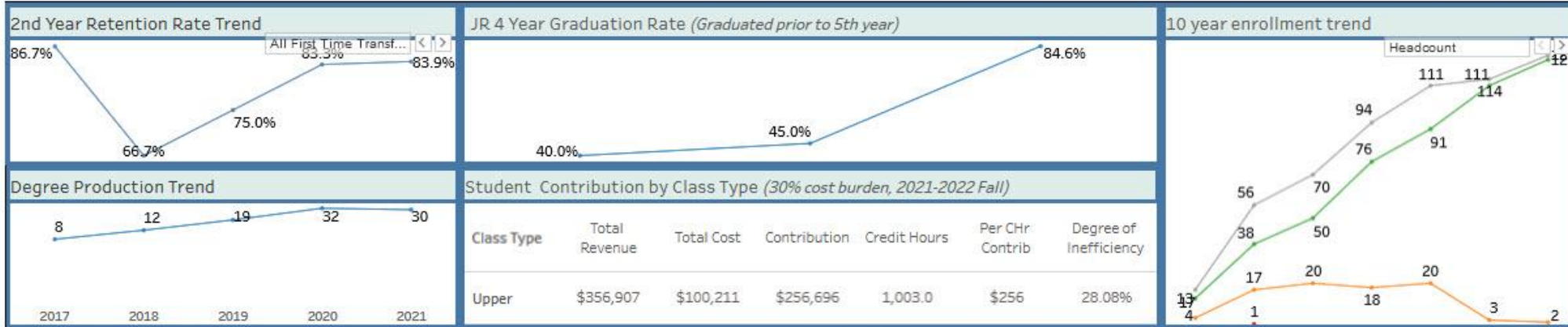
Undergraduate Program Review

Degree Type
■ Bachelor

Campus
■ Online
■ USM Gulf Coast

Primary Academic Plan

Library and Info Science BS



Student Contribution by Class Type (30% cost burden, 2021-2022 Fall)

Class Type	Total Revenue	Total Cost	Contribution	Credit Hours	Per Chr Contrib	Degree of Inefficiency
Upper	\$356,907	\$100,211	\$256,696	1,003.0	\$256	28.08%

Class School: (All) Course Subject: (All)

Course Success Detail - All courses taken by students in the selected Primary Academic Plan(s) and selected Campus(es). Use Class School and/or Course Subject filters to narrow the list of courses.

	Fall 2019-2020		Fall 2020-2021		Fall 2021-2022		Spring 2018-2019		Spring 2019-2020		Spring 2020-2021	
	Enrollments	Rate	Enrollments	Rate	Enrollments	Rate	Enrollments	Rate	Enrollments	Rate	Enrollments	Rate
ACC 200			1	0%	1	0%						
ANT 101	4	100%	3	67%			3	100%	2	50%		
ANT 221											1	100%
APT 200					1	100%						
APT 361					1	100%						
APT 380			3	100%	7	86%			3	100%	8	100%
ARE 309	1	100%	2	100%	1	100%	1	100%			1	100%
ART 130	8	100%			3	67%	3	67%	5	100%	3	100%
ART 334							1	100%			2	100%
ART 415							1	100%				
AST 111			1	0%	1	0%						



Program Costing | School Summary of Program Costs

Academic Year
2021-2022

Include Term or AY:
Academic Year

Include Cost Burden
Include Burden

Cost Burden
30.00%

School
Library & Information ...

Student Academic Plan
(All)

Student Program Campus
(All)

Total Revenue	Total Cost	Contribution
\$4,002,743	\$981,222	\$3,021,520
per Credit Hour Contribution	Cost Inefficiency	
\$341	24.51%	

Class Type	Student Contribution by Class Type					
	Total Revenue	Total Cost	Contribution	Credit Hours	Per CHR Contrib	Degree of Inefficiency
Gen Ed	\$225,714	\$38,818	\$186,896	636.0	\$294	17.20%
Lower	\$156,158	\$30,740	\$125,418	441.0	\$284	19.69%
Upper	\$773,196	\$196,715	\$576,481	2,162.0	\$267	25.44%
Grad	\$2,847,674	\$714,949	\$2,132,725	5,633.0	\$379	25.11%
Grand Total	\$4,002,743	\$981,222	\$3,021,520	8,872.0	\$341	24.51%

Contribution per Credit by Student Acad Plan*



*Upper Division credit hours are used for Undergraduate students and Graduate hours for Graduate students

SOURCE: USMIS Course Registrations Costing

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Question 2: Reflection and Next Steps

What could you immediately do to change your Integrated Planning process?

- A.** Survey your stakeholders to see what data they need to effectively support planning
- B.** Identify the stakeholders who need to be involved
- C.** Identify technology that can streamline the process
- D.** Align your institutional outcomes with the goals of your strategic plan



Role of Technology in Integrated Planning Efficiency

- **Best practices literature from the field includes:**
 - Technology implementation models
 - Pedagogical processes
 - Experience in practice
- **What technology is currently available on campus and what will need to be considered to compliment your processes?**



Fall Reading! Institutional Effectiveness 2.0 Guide Book: A New Path Forward for Higher Education



Learn More:

<https://www.heliocampus.com/en/institutionaleffectivenessguide>

Let's Keep in Touch

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A woman with glasses, wearing a dark sleeveless top, stands at the front of a meeting room, gesturing with her hands as if presenting. She is holding a small device in her right hand. In the foreground, several people are seated at desks, facing her. One man on the left is looking towards her, while others have their backs to the camera. The room has a brick wall in the background and a whiteboard with some diagrams. The entire image is overlaid with a semi-transparent orange filter.

Questions?

Thank you

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