Non-Instructional Program Review- Annual Update Template

Service Area/Administrative Unit

Non-Instructional Program Name: Office of Institutional Research

Academic Year: 2024-2025

Name(s) of Submitter(s): Lisa Holmes, Annie Andriese, Courtney Quenga

Annual Update #1 ☐ #2 ☒

Note: An Annual Update must be submitted each year that a Program Review is not submitted.

I. Progress on Goals and Outcomes (SAOs/AUOs)

A) List the 2-3 goals and related outcomes for your unit:
(These should be carried forward from your full Program Review, or from your Annual Update #1 if revised since your full Program Review)

1. **GOAL #1**
   Provide timely, relevant, and accurate information to the college community.

   Expected Service Area Outcome/Administrative Unit Outcome
   The college community has the knowledge and tools necessary to make timely, data-informed decisions.

2. **GOAL #2**
   Enable the college community to collaboratively and independently make data-informed decisions, facilitate continuous improvement and ensure equitable student success.

   Expected Service Area Outcome/Administrative Unit Outcome
   The college community can evaluate, with confidence, their program and/or department for effectiveness.

3. **GOAL #3**
   Click or tap here to enter text.

   Expected Service Area Outcome/Administrative Unit Outcome
   Click or tap here to enter text.

B) Have any goals been completed or discontinued?
If yes, please list the goal and whether it has been completed or discontinued; if discontinued, please explain why.
Yes ☐   No ☒

Click or tap here to enter text.

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C) Discuss the actions/strategies related to each goal and your progress on each of these. If you have not begun an(y) action/strategy please list why.

1. **GOAL #1 Action/Strategies**
   1) Calendar all recurring projects including goal setting, reporting, and dashboard updating.
   2) Synthesize different needs/requests to centralize/institutionalize data outputs.

   Discuss any progress on Action/Strategies.
   1) As reported in Update #1, all recurring projects are now on a department-wide calendar that is reviewed at the beginning of each month and is pinned to our OIR MS Team space. Since the update, additional recurring projects have been added as they are requested; there are currently 30 items on the calendar. Additionally, the calendar was shared with the entire college in Issue 5 of the OIR Newsletter published in May 2024. Because we shared the list, one department reached out to inform us that we missed their annual survey; we immediately made the correction. We have since added an additional calendar specifically for surveys. These surveys are recurring, sometimes annually, sometimes in certain years. This calendar allows us to spread out surveys to avoid or limit survey fatigue. Every attempt is made to schedule any non-recurring/one-time surveys during months were recurring surveys are not already scheduled.

Task(s)	JULY	SEPTEMBER	OCTOBER	NOVEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY
Athletics Interest Survey (every 3 years) 2024		Students							
Committee Effectiveness Surveys								Employees	
Exit/Graduate Experience Survey									Students
Exit Survey Follow-up	Students								
Open House Survey									Students
Mental Health Baseline Survey			Students						
Professional Development					Employees				
Program Review Process Survey				Employees					

   2) In update #1, we reported that research requests are now going to the appropriate supervisor for approval before work in IR begins so that duplication of effort is limited. Of the 19 official research requests submitted through HappyFox, 13 (68%) were submitted by or with prior approval by a VP or the President and 1 (5%) was submitted without VP knowledge. It is unclear if the area VPs had prior knowledge or approved the remaining 5 (26%) requests. The one request that was not pre-approved was put on hold during a transition period and ultimately cancelled; one additional request was cancelled after meeting with the requestor and coming to the realization that the data was not needed after all. Beginning this year, requests will be reviewed at Cabinet to ensure collaboration across the various areas. We do also realize that not all requests are coming through the ticket submission process and for the sake of time, we have not been very strict about this requirement. **Over the next year we will revamp the ticket so that completing it is less burdensome on the user**. We continue to work on helping departments, committees, etc. ensure that goal setting, KPIs, etc. align across the institution and relate to and strive towards institution-wide goals such as institution-set standards, President's Goals, Board Goals, Vision for Success Goals, etc. **Prep work**

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> **towards gathering all metrics into one institution-wide annual report card will begin this year.** Training in SQL and human subjects research is still much needed for OIR staff.

Briefly explain how you have been measuring the goal and any notable indicators of forward progress.

1) The calendar is reviewed monthly and is a living, evolving document. Projects are consistently completed on time. An additional calendar specific to surveys is also now in place. This item can be considered complete.

2) Ad-hoc requests still appear to be decreasing however, many requests are still coming in via phone, email, and/or conversation and not properly tracked. Of the 17 research requests that came in through HappyFox and were completed, the average time to completion was 10.6 days for all requests, and 5.4 days if removing tickets that took significant time due to waiting on action from the requestor. Additionally, of the 17 requests, 6 (35%) of them resulted in Argos reports that now provide self-service access to the requestor in the future.

2. **GOAL #2 Action/Strategies**
   1) To support data driven decisions, implement a data-coaching workshop series.
   2) Create targeted data-dashboards for internal and external audiences.

Discuss any progress on Action/Strategies

1) Over the past year, the OIR has held Open Office Hours for a two-hour block of time immediately preceding the All-College meetings. These office hours have been advertised through the PIO weekly updates and the IR Newsletters. Unfortunately, there has been very low attendance. During program review in fall 2023, two faculty members dropped in to get help with data. There were three meetings where the Interim Dean of Counseling and/or new Counselors participated.

2) Data dashboards are created when and where appropriate. Since the last update we have created a new Fraud Reporting Dashboard for IT and have added a Financial Aid chapter to the BCC Fact Book. We are currently working on a "Time to Completion" dashboard for Instructional Program Review.

Briefly explain how you have been measuring the goal and any notable indicators of forward progress.

1) With the very light participation in OIR Office Hours, we realize changes need to be made. Going forward we will schedule pre-determined topics surrounding data and advertise those topics. We will also ask for input from IEC members as to what topics might be needed. Examples include: An Explanation and Deep Dive into the SCFF; Exploring the BCC Fact Book; The Ins and Outs/Do's and Don'ts of Survey Creation; Enrollment Tracking and FTES.

2) Over the course of the last year, data dashboards have become less of a priority while quick access to live data through Argos reports has become a big need. Dashboards are created using Tableau which, because of the type of licenses we have, only allows publishing to the public website, limiting our ability to publish all data due to privacy

and security issues. The type of access we have to Tableau also only allows us to manually update the dashboards. It is a great tool, but it has it's limitations and the version that would allow much greater functionality is not cost friendly. Because of these limitations, focus has been on utilizing Argos where possible. As reported in Goal #1, many requests for data are being built in Argos for easy access by the requestor for future pulls of the same type of data. As reported in the previous update, SQL training would be extremely beneficial as requests for data are getting more complex and frequent.

3. **GOAL #3 Action/Strategies**
Click or tap here to enter text.

Discuss any progress on Action/Strategies
Click or tap here to enter text.

Briefly explain how you have been measuring the goal and any notable indicators of forward progress.
Click or tap here to enter text.

D) **List any resources you are requesting for each goal.**

1. Goal 1 ☒   Goal 2 ☒   Goal 3 ☐

   Please list the resource and how it relates to the goal.
   CITI Certification for Human Subjects Research: The need for surveys, focus groups, etc. is increasing; training specific to human subjects' research is needed for staff. This is a repeat request from the previous year.

2. Goal 1 ☒   Goal 2 ☒   Goal 3 ☐

   Please list the resource and how it relates to the goal.
   SQL Certification Training: SQL Certification training for staff would enable them to query data more efficiently resulting in faster turnaround time for publishing meaningful dashboards. This is a repeat request from the previous year.

3. Goal 1 ☐   Goal 2 ☐   Goal 3 ☐

   Please list the resource and how it relates to the goal.
   Click or tap here to enter text.

II. New Goals (optional)
This section is optional and should be used to replace a completed or discontinued goal OR if a new goal has become necessary for the service area or administrative unit.

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A. NEW GOAL #1

Streamline data processing from entry point through validation and submission, including MIS, to ensure greater data quality, timeliness, and access for easier data-driven decision making.

Expected Service Area Outcome/Administrative Unit Outcome

All college employees will have access to accurate and timely data for monitoring effectiveness, decision-making, and reporting.

1. Alignment to BCC Strategic Priority *(Select at least one but choose all that apply)*

Strategic Priority 1: Innovate to Achieve Equitable Student Success

Strategic Priority 4: Achieve Sustainable Excellence in all Operations

Choose an item.

Choose an item.

2. Relationship to Guided Pathways

☒ Clarify the Path

☒ Entering the Path

☒ Staying on the Path

☒ Support Learning

3. Please list actions/strategies for achieving this goal/outcome.
   1) Collaborate with IT/MIS and Enrollment Services to create processes that allow for data validation prior to MIS submission through the design of new Argos Datablocks and reports.
   2) Create shared SOPs for MIS processes for current and future employees/continuity.
   3) Cross-train with IT/MIS Database Analysts and develop innovative strategies to ensure backup of specific functions (i.e. MIS submissions) are in place and to foster a shared understanding of each other's workflows and challenges.
   4) Work with individual departments to a) help the department and the IR staff understand the departments' processes for data collection and entry, b) streamline processes for clean data entry, c) ensure data collection is appropriate and in place for MIS submission, program review, and the VAR initiative where necessary.
   5) Assist departments in the creation of SOPs regarding data collection and entry for current and future department staff/continuity.
   6) Implement a Data Warehouse software such as Invoke, to clean and house data for easy access by many, if not all, employees.
   7) Investigate the possibility of reorganizing the IR office to include a second Research Analyst and to include revised duties to better align with the needs of IT/MIS and the

District.

4. Briefly explain how you will measure the goal/outcome.
    1) The number of errors and submissions for MIS will decrease. *(For the past 15 term submissions, the files were submitted 22 times on average.)*
    2) MIS term submissions will be completed on time (30 days past the end of term). *(For the past 15 term submissions, the files were submitted 24 days after the 30-day deadline, on average.)*
    3) IT/MIS and IR will be fully staffed with appropriate number of skilled employees that also allow for cross-over functionality and collaboration.
    4) IT/MIS tickets will be addressed and closed with less delay.
    5) Department level and district level SOPs regarding data collection and entry will be created and housed in an easy to access location so in the case of employee turnover, information is not lost, and work continues seamlessly.
    6) The preparation for, and the implementation of, a data warehouse will improve all of the outcomes listed above.

5. Please list resources (if any) that will be needed to achieve the goal/outcome.
    1) Reorganization of the IR office including revised and/or new job descriptions in collaboration and alignment with the IT/MIS department.
    2) Purchase and Implementation of Invoke Learning: $55,000/year

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B. NEW GOAL #2
Click or tap here to enter text.

Expected Service Area Outcome/Administrative Unit Outcome
Click or tap here to enter text.

6. Alignment to BCC Strategic Priority *(Select at least one but choose all that apply)*
Choose an item.

Choose an item.

Choose an item.

Choose an item.

7. Relationship to Guided Pathways

☐   Clarify the Path

☐   Entering the Path

☐   Staying on the Path

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☐   Support Learning

8. Please list actions/strategies for achieving this goal/outcome.
   Click or tap here to enter text.

9. Briefly explain how you will measure the goal/outcome.
   Click or tap here to enter text.

10. Please list resources (if any) that will be needed to achieve the goal/outcome.
    Click or tap here to enter text.

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III.　　Resource Requests:

What does the area need to meet its goals and objectives?
List all resources from Sections I.D and II.10 below.
If there was no room on the template to list all resources being requested for a single goal/objective, you may list additional resource requests here. Also list any resources required to implement planned improvements.

IMPORTANT: **A BUDGET ALLOCATION PROPOSAL** must be completed and submitted for **EACH** new resource requested.

Goal/ Outcome #	Resource Required	Estimated Cost	BAP Required? Yes or No	If no, indicate funding source
1&2	Citi Certification in Human Subjects Research for Staff (Repeat Request)	$750	Yes	Click or tap here to enter text.
1&2	SQL Training for Staff	$1000	Yes	Click or tap here to enter text.
1,2,3	Reorganization of IR Office to include either 1) Revised JD, 2) New JD, or 3) Shared JD with IT	Unknown at this time. Estimated $7500-$83000/annual	Yes	Click or tap here to enter text.
1,2,3	Purchase and Implementation of Invoke Learning	$55,000/annual	Yes	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

BUDGET ALLOCATION PROPOSAL

Date: 8/23/2024	**Originator:**	Lisa Holmes
Program or Department Name:		Research Dept.
Dean/Vice President/Supervisor:		Dr. Bagg

What are you requesting? *(Brief)*	Citi Certification in Human Subjects Research
Amount Requested: $750.00	☒ One-time Funding ☐ Ongoing Funding
Funding Source (if known):	

REQUEST TYPE:

☐ **Personnel/Staffing** *Complete **Personnel/Staffing** section below* ☐ OTHER	☐ **Technology Resource** *Complete **Technology** section below*	☐ **Facilities Resource** *Complete **Facilities** section below*	☒ **Professional Development** *Complete **Professional Development** section below*

PERSONNEL/STAFFING REQUEST

Is the position request for: ☐ Faculty   ☐ Classified   ☐ Management/Confidential

Is the position requested: ☐ A new classification   (Attach *proposed* job description, or *detailed* list of proposed duties)

☐ An existing classification   *Official Job Title:*

Is the position requested: ☐ Full Time   ☐ Part Time: _____ Months/Year _____ Hours/Week

TECHNOLOGY RESOURCE REQUEST

Indicate the category of the request:
☐ Hardware   ☐ Software   ☐ Printer/Copier   ☐ Network   ☐ Audio-Visual   ☐ License/Maintenance

Indicate the intended users: ☐ Students   ☐ Faculty   ☐ Staff   ☐ Other

Is training required?   ☐ No   ☐ Yes   Explain:

How will it be secured?   ☐ Alarm   ☐ Secure Room   ☐ Secure Cabinet   ☐ Cable/Lock   ☐ Password

Have you completed and attached the Technology Assessment Form?

FACILITIES RESOURCE REQUEST

Indicate the intended users: ☐ Students   ☐ Faculty   ☐ Staff   ☐ Other

Is maintenance required?   ☐ No   ☐ Yes   Explain:

PROFESSIONAL DEVELOPMENT REQUEST

Indicate the intended users: ☐ Students   ☐ Faculty   ☒ Staff   ☐ Other

Do other internal areas/departments need to be involved?
☒ No   ☐ Yes   Explain: _____

Is technology needed? ☒ No   ☐ Yes   Explain: _____

1. Why is the request being made?

> The need for surveys, focus groups, research studies, etc. is increasing; training specific to human subjects' research is needed for staff. CITI Program's Social-Behavioral-Education (SBE) Comprehensive Course description: "This SBE-focused comprehensive course provides an expanded training covering not only major topical areas but also many concepts that are specific to types of research, roles in the protection of human subjects, and advanced modules on informed consent topics, vulnerable populations, big data research, mobile apps research, and disaster and conflict research. It offers historic and current information on regulatory and ethical issues important to the conduct of research involving human subjects. Case studies are used within the modules to present key concepts."

2. a) Where in the Program Review/Annual Update is the request supported? Include the text from the Program Review AND cite the applicable section number(s).

> Goal #1, progress on action/strategies. Goal #1: Provide timely, relevant, and accurate information to the college community; SAO: The college community has the knowledge and tools necessary to make timely, data-informed decisions; Action/Strategy #2: Synthesize different needs/requests to centralize/institutionalize data outputs; We continue to work on helping departments, committees, etc. ensure that goal setting, KPIs, etc. align across the institution and relate to and strive towards institution-wide goals such as institution-set standards, President's Goals, Board Goals, Vision for Success Goals, etc. Prep work towards gathering all metrics into one institution-wide annual report card will begin this year. Training in SQL and human subjects research is still much needed for OIR staff.

b) Explain how the request is supported with information gathered from the assessment of outcomes (Student Learning Outcomes, Program Level Outcomes, Service Area Outcomes, or Administrative Unit Outcomes).

> SAO: The college community has the knowledge and tools necessary to make timely, data-informed decisions. The OIR staff has been able to complete 90% of the research requests submitted. The two requests we were unable to complete was due to an ultimate lack of need. We also acknowledge that as more requests come in for more sophisticated data, we need additional training that would not only increase our abilities to improve our outcomes but would also ensure the protection of our students and employees.

c) How was this included in the Area Goals section of your Program Review? Please cite section/item number and include the text.

> Goal #1, progress on action/strategies. Goal #1: Provide timely, relevant, and accurate information to the college community; SAO: The college community has the knowledge and tools necessary to make timely, data-informed decisions; Action/Strategy #2: Synthesize different needs/requests to centralize/institutionalize data outputs; Progress on Action/Strategy #2: We continue to work on helping departments, committees, etc. ensure

that goal setting, KPIs, etc. align across the institution and relate to and strive towards institution-wide goals such as institution-set standards, President's Goals, Board Goals, Vision for Success Goals, etc. Prep work towards gathering all metrics into one institution-wide annual report card will begin this year. Training in SQL and human subjects research is still much needed for OIR staff.

3. If this item is approved, what departments or resources are needed, or would be affected, when implementing or developing it, on both a short-term and a long-term basis? Have they been notified? Example: Technology Assessment Form
(This question is not required for Personnel/Staffing requests.)

N/A

4. a) How will this resource improve student success or institutional services?

Additional training that would not only increase our abilities to improve our outcomes but would also ensure the protection of our students and employees. Appropriately collecting more qualitative data will give insight into how student success can be supported.

b) What data will you gather and analyze to demonstrate that your proposal is meeting this goal(s)?

Continue to monitor the ability to produce timely, relevant, and accurate information. This resource would allow us to increase the quality of work produced and allow for more "voices" to be collected.

5) Describe how your request is aligned with as many of the college's strategic planning documents as applicable. (If the request does not align with a document, indicate N/A.)

Please be specific and provide detail, ensuring a clear correlation between content of referenced document and the request. Cite the section and page numbers where the correlation can be found.

(Follow the links to access each document)

1. Mission Statement

The resource will allow us to provide timely, relevant, and accurate information to the college community for the purpose of making data-informed decisions, facilitating continuous improvement and fulfilling the College's mission of ensuring equitable student success.

2. Strategic Priorities / Strategic Goals

Strategic Priority #4: Achieve Sustainable Excellence in all Operations; Strategic Intention #3: Enhance and further an evidence-based framework that supports institutional planning and decision-making process; #1 Foster the use of data, inquiry, and evidence, and #2 Improve access to integrated and actionable data.

3. Educational Master Plan

All goals of the Educational Master Plan require the measurement of the outcomes and the effectiveness of the strategies employed. This will require the assistance from IR in most cases and will not only involve quantitative analysis but also qualitative. This research

includes working with human subjects. The resource requested, CITI certification, will help ensure that we are following all recommended and required protocols.

4. Others: Such as Technology Plan , Facilities Master Plan, HR Staffing Plan, Professional Development Plan

All plans require some assistance from the OIR whether it is for helping set goals or benchmarks, researching possible activities to help with achieving goals, or helping to measure outcomes and effectiveness. As with the Educational Master Plan mentioned above, these research activities often involve human subjects; CITI certification will help ensure that we are following all recommended and required protocols.

ADMINISTRATIVE USE

Administrator: _____ Title: _____

Comments/Recommendations:

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Signature: _____ Date: _____

Administrator: _____ Title: _____

Comments/Recommendations:

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Unit Priority Ranking: _____ of _____

BUDGET INFORMATION
*(This section **MUST** be completed)*

Budget Program Number: _____   ☐ Restricted   ☐ Unrestricted

Comments regarding Budget Information: _____

Signature: _____ Date: _____

BUDGET ALLOCATION PROPOSAL

Date: 8/23/2024	**Originator:**	Lisa Holmes
Program or Department Name:		Research Dept.
Dean/Vice President/Supervisor:		Dr. Bagg

What are you requesting? *(Brief)*	SQL Training/Certification
Amount Requested: $1000.00	☒ One-time Funding ☐ Ongoing Funding
Funding Source (if known):	

REQUEST TYPE:

☐ **Personnel/Staffing** *Complete **Personnel/Staffing** section below* ☐ **OTHER**	☐ **Technology Resource** *Complete **Technology** section below*	☐ **Facilities Resource** *Complete **Facilities** section below*	☒ **Professional Development** *Complete **Professional Development** section below*

PERSONNEL/STAFFING REQUEST

Is the position request for: ☐ Faculty   ☐ Classified   ☐ Management/Confidential

Is the position requested: ☐ A new classification   (Attach *proposed* job description, or *detailed* list of proposed duties)

☐ An existing classification   *Official Job Title:*

Is the position requested: ☐ Full Time   ☐ Part Time: Months/Year   Hours/Week

TECHNOLOGY RESOURCE REQUEST

Indicate the category of the request:

☐ Hardware   ☐ Software   ☐ Printer/Copier   ☐ Network   ☐ Audio-Visual   ☐ License/Maintenance

Indicate the intended users: ☐ Students   ☐ Faculty   ☐ Staff   ☐ Other

Is training required?   ☐ No   ☐ Yes   Explain:

How will it be secured?   ☐ Alarm   ☐ Secure Room   ☐ Secure Cabinet ☐ Cable/Lock   ☐ Password

Have you completed and attached the [Technology Assessment Form](#)?

FACILITIES RESOURCE REQUEST

Indicate the intended users: ☐ Students   ☐ Faculty   ☐ Staff   ☐ Other

Is maintenance required? ☐ No   ☐ Yes   Explain:

PROFESSIONAL DEVELOPMENT REQUEST

Indicate the intended users:	☐ Students	☐ Faculty	☒ Staff	☐ Other

Do other internal areas/departments need to be involved?
☐ No ☒ Yes Explain: _Possibly IT to download practice software depending on chosen course_

Is technology needed? ☐ No ☒ Yes Explain: _Possibly IT to download practice software depending on chosen course_

1. Why is the request being made?

> As research requirements are becoming more nuanced, querying data is becoming more complicated. To be able to get to that data more efficiently, training in SQL would benefit.

2. a) Where in the Program Review/Annual Update is the request supported? Include the text from the Program Review AND cite the applicable section number(s).

> Goal #1, progress on action/strategies, 2) We continue to work on helping departments, committees, etc. ensure that goal setting, KPIs, etc. align across the institution and relate to and strive towards institution-wide goals such as institution-set standards, President's Goals, Board Goals, Vision for Success Goals, etc. Prep work towards gathering all metrics into one institution-wide annual report card will begin this year. **Training in SQL and human subjects research is still much needed for OIR staff.** Goal #2, …measuring the goal and any notable indicators of forward progress, 2) Over the course of the last year, data dashboards have become less of a priority while quick access to live data through Argos reports has become a big need. Dashboards are created using Tableau which, because of the type of licenses we have, only allows publishing to the public website, limiting our ability to publish all data due to privacy and security issues. The type of access we have to Tableau also only allows us to manually update the dashboards. It is a great tool, but it has its limitations and the version that would allow much greater functionality is not cost friendly. Because of these limitations, focus has been on utilizing Argos where possible. As reported in Goal #1, many requests for data are being built in Argos for easy access by the requestor for future pulls of the same type of data. **As reported in the previous update, SQL training would be extremely beneficial as requests for data are getting more complex and frequent.**

b) Explain how the request is supported with information gathered from the assessment of outcomes (Student Learning Outcomes, Program Level Outcomes, Service Area Outcomes, or Administrative Unit Outcomes).

> SAO #1: The college community has the knowledge and tools necessary to make timely, data-informed decisions. SAO #2: The OIR staff has been able to complete 90% of the research requests submitted. The two requests we were unable to complete was due to an ultimate lack of need. We also acknowledge that as more requests come in for more sophisticated data (disaggregation, cohorts, pathways, etc.), SQL training would help to get to and analyze the data more efficiently.

c) How was this included in the Area Goals section of your Program Review? Please cite section/item number and include the text.

> Goal #1, progress on action/strategies, 2) We continue to work on helping departments, committees, etc. ensure that goal setting, KPIs, etc. align across the institution and relate to and strive towards institution-wide goals such as institution-set standards, President's Goals, Board Goals, Vision for Success Goals, etc. Prep work towards gathering all metrics into one institution-wide annual report card will begin this year. **Training in SQL and human subjects research is still much needed for OIR staff.** Goal #2, …measuring the goal and any notable indicators of forward progress, 2) Over the course of the last year, data dashboards have become less of a priority while quick access to live data through Argos reports has become a big need. Dashboards are created using Tableau which, because of the type of licenses we have, only allows publishing to the public website, limiting our ability to publish all data due to privacy and security issues. The type of access we have to Tableau also only allows us to manually update the dashboards. It is a great tool, but it has its limitations and the version that would allow much greater functionality is not cost friendly. Because of these limitations, focus has been on utilizing Argos where possible. As reported in Goal #1, many requests for data are being built in Argos for easy access by the requestor for future pulls of the same type of data. **As reported in the previous update, SQL training would be extremely beneficial as requests for data are getting more complex and frequent.**

3. If this item is approved, what departments or resources are needed, or would be affected, when implementing or developing it, on both a short-term and a long-term basis? Have they been notified? Example: Technology Assessment Form
   (This question is not required for Personnel/Staffing requests.)

   > N/A

4. a) How will this resource improve student success or institutional services?

   > Training in SQL would help staff to be able to pull and analyze the data more efficiently. SQL Certification training for staff would enable them to query data more efficiently resulting in faster turnaround time for publishing meaningful dashboards and creating Argos reports for department use.

   b) What data will you gather and analyze to demonstrate that your proposal is meeting this goal(s)?

   > Continue to monitor the ability to produce timely, relevant, and accurate information. This resource would allow us to increase the quantity and quality of work produced.

5) Describe how your request is aligned with as many of the college's strategic planning documents as applicable. (If the request does not align with a document, indicate N/A.)

   Please be specific and provide detail, ensuring a clear correlation between content of referenced document and the request. Cite the section and page numbers where the correlation can be found.

   (Follow the links to access each document)

   1. Mission Statement

      > The request will allow us to provide timely, relevant, and accurate information to the college community for the purpose of making data-informed decisions, facilitating continuous improvement and fulfilling the College's mission of ensuring equitable student success.

2. Strategic Priorities / Strategic Goals

> Strategic Priority #4: Achieve Sustainable Excellence in all Operations; Strategic Intention #3: Enhance and further an evidence-based framework that supports institutional planning and decision-making process; #1 Foster the use of data, inquiry, and evidence, and #2 Improve access to integrated and actionable data.

3. Educational Master Plan

> All goals of the Educational Master Plan require the measurement of the outcomes and the effectiveness of the strategies employed. This will require the assistance from IR in most cases and will involve assistance from IR to query data quickly and accurately. This resource will ensure that IR staff can meet that need.

4. Others: Such as Technology Plan , Facilities Master Plan, HR Staffing Plan, Professional Development Plan

> All plans require some assistance from the IR whether it is for helping set goals or benchmarks, researching possible activities to help with achieving goals, or helping to measure outcomes and effectiveness. These activities require querying and analyzing data. SQL training would help do that in a more efficient way with less time wasted trying to figure out how to write the statement, relying on IT, and/or manually cleaning output.

ADMINISTRATIVE USE

Administrator: _____   Title: _____

Comments/Recommendations:

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Signature: _____   Date: _____

Administrator: _____   Title: _____

Comments/Recommendations:

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Unit Priority Ranking: _____ of _____

BUDGET INFORMATION
*(This section **MUST** be completed)*

Budget Program Number: _____   ☐ Restricted   ☐ Unrestricted

Comments regarding Budget Information: _____

Signature: _____   Date: _____

BUDGET ALLOCATION PROPOSAL

Date: 8/23/2024		**Originator:** Lisa Holmes	

Program or Department Name: Research Dept.

Dean/Vice President/Supervisor: Dr. Bagg

What are you requesting? *(Brief)* Invoke Learning

Amount Requested: $55,000   ☐ One-time Funding   ☒ Ongoing Funding

Funding Source (if known):

REQUEST TYPE:

☐ Personnel/Staffing *Complete **Personnel/Staffing** section below* ☐ OTHER	☒ Technology Resource *Complete **Technology** section below*	☐ Facilities Resource *Complete **Facilities** section below*	☐ Professional Development *Complete **Professional Development** section below*

PERSONNEL/STAFFING REQUEST

Is the position request for: ☐ Faculty   ☐ Classified   ☐ Management/Confidential

Is the position requested: ☐ A new classification   (Attach *proposed* job description, or *detailed* list of proposed duties)

       ☐ An existing classification   *Official Job Title:*

Is the position requested: ☐ Full Time   ☐ Part Time: Months/Year   Hours/Week

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TECHNOLOGY RESOURCE REQUEST

Indicate the category of the request:

☐ Hardware   ☒ Software   ☐ Printer/Copier   ☐ Network   ☐ Audio-Visual   ☒ License/Maintenance

Indicate the intended users: ☐ Students   ☐ Faculty   ☒ Staff   ☐ Other

Is training required?   ☐ No   ☒ Yes   Explain: Training will be required for IT and IR during implementation.

How will it be secured?   ☐ Alarm   ☐ Secure Room   ☐ Secure Cabinet   ☐ Cable/Lock   ☒ Password

Have you completed and attached the Technology Assessment Form?

FACILITIES RESOURCE REQUEST

Indicate the intended users: ☐ Students   ☐ Faculty   ☐ Staff   ☐ Other

Is maintenance required?   ☐ No   ☐ Yes   Explain:

PROFESSIONAL DEVELOPMENT REQUEST

Indicate the intended users: ☐ Students ☐ Faculty ☒ Staff ☐ Other

Do other internal areas/departments need to be involved?
☒ No ☐ Yes Explain: _____

Is technology needed? ☒ No ☐ Yes Explain: _____

1. Why is the request being made?

> With the increasing need for access to accurate and timely information, it is imperative that we bring our data into a more accessible environment. Additionally, with the turnover experienced in IT, BCC needs a more streamlined and efficient way to manage and clean that data while adding additional sources of information not currently available to us. Invoke brings together multiple data sources such as Banner Student, Canvas, SARS, DegreeWorks, Bureau of Labor Statistics, US Census Bureau, along with many other possibilities into one, easy to access location.

2. a) Where in the Program Review/Annual Update is the request supported? Include the text from the Program Review AND cite the applicable section number(s).

> Goal #1: Provide timely, relevant, and accurate information to the college community; SAO: The college community has the knowledge and tools necessary to make timely, data-informed decisions; Goal #2, Enable the college community to collaboratively and independently make data-informed decisions, facilitate continuous improvement and ensure equitable student success; SAO: The college community can evaluate, with confidence, their program and/or department for effectiveness; Action/Strategy #2: Create targeted data-dashboards for internal and external audiences. Goal#3 (New Goal #1), Streamline data processing from entry point through validation and submission, including MIS, to ensure greater data quality, timeliness, and access for easier data-driven decision making; SAO: All college employees will have access to accurate and timely data for monitoring effectiveness, decision-making, and reporting; Action/Strategies 1-6:
> 1) Collaborate with IT/MIS and Enrollment Services to create processes that allow for data validation prior to MIS submission through the design of new Argos Datablocks and reports.
> 2) Create shared SOPs for MIS processes for current and future employees/continuity.
> 3) Cross-train with IT/MIS Database Analysts and develop innovative strategies to ensure backup of specific functions (i.e. MIS submissions) are in place and to foster a shared understanding of each other's workflows and challenges.
> 4) Work with individual departments to a) help the department and the IR staff understand the departments' processes for data collection and entry, b) streamline processes for clean data entry, c) ensure data collection is appropriate and in place for MIS submission, program review, and the VAR initiative where necessary.
> 5) Assist departments in the creation of SOPs regarding data collection and entry for current and future department staff/continuity.
> 6) **Implement a Data Warehouse software such as Invoke, to clean and house data for easy access by many, if not all, employees.**

b) Explain how the request is supported with information gathered from the assessment of outcomes (Student Learning Outcomes, Program Level Outcomes, Service Area Outcomes, or Administrative Unit Outcomes).

> This is a new Goal and SAO introduced during this annual update however, although Invoke is attached to Goal #3 (New #1), it applies the two already existing goals. Invoke will help us better reach these goals and their accompanying outcomes: SAO #1: The college community has the **knowledge and tools** necessary to make timely, data-informed decisions; SAO #2: The college community **can evaluate**, with confidence, their program and/or department for effectiveness; SAO #3: All college employees will **have access to accurate and timely data** for monitoring effectiveness, decision-making, and reporting.

c) How was this included in the Area Goals section of your Program Review? Please cite section/item number and include the text.

> Goal #3 (New Goal #1): Streamline data processing from entry point through validation and submission, including MIS, to ensure greater data quality, timeliness, and access for easier data-driven decision making; SAO: All college employees will have access to accurate and timely data for monitoring effectiveness, decision-making, and reporting; Action/Strategy #6:
> 6)   Implement a Data Warehouse software such as Invoke, to clean and house data for easy access by many, if not all, employees; Outcomes/Measures 1-6:
> 1)   The number of errors and submissions for MIS will decrease. (For the past 15 term submissions, the files were submitted 22 times on average.)
> 2)   MIS term submissions will be completed on time (30 days past the end of term). (For the past 15 term submissions, the files were submitted 24 days after the 30-day deadline, on average.)
> 3)   IT/MIS and IR will be fully staffed with appropriate number of skilled employees that also allow for cross-over functionality and collaboration.
> 4)   IT/MIS tickets will be addressed and closed with less delay.
> 5)   Department level and district level SOPs regarding data collection and entry will be created and housed in an easy to access location so in the case of employee turnover, information is not lost, and work continues seamlessly.
> 6)   The preparation for, and the implementation of, a data warehouse will improve all of the outcomes listed above.

3. If this item is approved, what departments or resources are needed, or would be affected, when implementing or developing it, on both a short-term and a long-term basis? Have they been notified? Example: Technology Assessment Form
(This question is not required for Personnel/Staffing requests.)

> The Technology Assessment Form has been completed, but is not yet signed. IT is in favor of purchase and implementation as, after initial deployment, the product will decrease the load and reliance on IT staff.

4. a) How will this resource improve student success or institutional services?

> Cleaner data and quicker access will allow all areas of the college to focus more on measuring effectiveness of initiatives so that actionable change can occur.

b) What data will you gather and analyze to demonstrate that your proposal is meeting this goal(s)?

> 1)   The number of "values" tables populated in Invoke Learning is condensed (currently, data is housed in hundreds/thousands of separate tables and locations- each new query requires locating tables and fields and creating joins).
> 2)   Methodology for how those values are calculated and definitions for data elements are documented.

> 3) The number of accessible data sources will increase.

5) Describe how your request is aligned with as many of the college's strategic planning documents as applicable. (If the request does not align with a document, indicate N/A.)

Please be specific and provide detail, ensuring a clear correlation between content of referenced document and the request. Cite the section and page numbers where the correlation can be found.

(Follow the links to access each document)

1. Mission Statement

> The resource will allow us to provide timely, relevant, and accurate information to the college community for the purpose of making data-informed decisions, facilitating continuous improvement and fulfilling the College's mission of ensuring equitable student success.

2. Strategic Priorities / Strategic Goals

> Strategic Priority #4: Achieve Sustainable Excellence in all Operations; Strategic Intention #3: Enhance and further an evidence-based framework that supports institutional planning and decision-making process; #1 Foster the use of data, inquiry, and evidence, and #2 Improve access to integrated and actionable data.

3. Educational Master Plan

> All goals of the Educational Master Plan require the measurement of the outcomes and the effectiveness of the strategies employed. This will require the assistance from IR in most cases and will not only involve quantitative analysis but also qualitative. Upon implementation and deployment of the software, special consideration will be given to first populate tables that will assist in evaluating our effectiveness in reaching our mission, strategic goals, etc.

4. Others: Such as Technology Plan , Facilities Master Plan, HR Staffing Plan, Professional Development Plan

> All plans require some assistance from the IR whether it is for helping set goals or benchmarks, researching possible activities to help with achieving goals, or helping to measure outcomes and effectiveness. These activities require querying and analyzing data. Implementing Invoke Learning will help do that more efficiently with less time wasted.

ADMINISTRATIVE USE

Administrator: _____ Title: _____

Comments/Recommendations:

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Signature: _____ Date: _____

Administrator: _____ Title: _____

Comments/Recommendations:

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Unit Priority Ranking: _____ of _____

BUDGET INFORMATION
*(This section **MUST** be completed)*

Budget Program Number: _____   ☐ Restricted   ☐ Unrestricted

Comments regarding Budget Information: _____

Signature: _____ Date: _____

BARSTOW COMMUNITY COLLEGE DISTRICT
Technology Assessment Form for Software and Equipment

Directions:

The requestor will work with the Director of IT and the VP of Administrative Services to complete sections A-E and attach to their Administrative Unit or Program's Budget Allocation Proposal during the Program Review process.

A. Purchase Information

1.	Requestor Name	Lisa Holmes
2.	Department or Program Name	Institutional Research
3.	Equipment/Software Description	Invoke Learning

B. Operational Expenses and Detailed Description of Required Services Needed

1.	Software (Description and cost)	**Invoke**Clarity^{TM} is an advanced data platform designed for higher education. As a leading data lakehouse (data lake + data warehouse) solution, **Invoke**Clarity^{tm} leverages advanced cloud technologies and data virtualization to provide institutions with a solution that far surpasses the capabilities of traditional data warehouses while remaining both fast-to-deploy and easy-to-use. $50,000 (platform) and $5,000 (Snowflake Credits) annually.
2.	Hardware (Description and cost)	N/A
3.	Implementation costs	Included in Software cost above.
4.	Maintenance a) Software b) Hardware c) Programming d) Employee Set-up e) Inventory Control	
5.	Subscription or Perpetual License a) yearly cost b) site licensing, per computer or per user licensing.	$50,000 (platform) and $5,000 (Snowflake Credits) annually
6.	Who will maintain this product/application? a) Department b) IT Department c) Vendor	IT will maintain appropriate connections; IR will manage the set-up of the tables, maintain data element dictionaries, etc.
7.	Is the quote attached for the new software/hardware?	Yes
8.	Sustainability Requirement	

C. **Describe the Total Cost of Ownership (V.P. of Administrative Services)**

(Include total cost of project, software and equipment (including human resource costs) in description)

D. *Check all boxes to which this purchase applies*

Mission Statement *(must apply)*	
Barstow Community College is an open-access learning environment that promotes critical thinking, communication, personal and professional responsibility, and global awareness by offering quality courses, programs, and support services.	☒
Within accreditation standards?	☒
Maintains fiscal integrity?	☐
Promotes employee involvement in activities associated with professional responsibilities.	☒
Increases student engagement, student success and student equity?	☒
Promotes Workforce and Economic Development within the local community, the District and region?	☒
Strategic Priorities *(must apply to at least 1)*	
Innovates to Achieve Equitable Student Success?	☒
Ignites a Culture of Learning and Innovation?	☐
Builds Community?	☐
Achieves Sustainable Excellence in all Operations?	☒

E. Acknowledgement of receipt and awareness of terms, conditions, and regulations

Title	Name	Signature	Date
Initiator Supervisor			
Director of IT			
Budget Analyst			
VP Administrative Services			

F. Approval of Purchase

Title	Name	Signature	Date

Cabinet Approval			
Superintendent/President			