Memo

To: Laurie Sharp, Associate Provost – Academic Programs and Assessment

From: Laura Busby, Director – Business Intelligence & Research Services

cc: Nathan Gerber, Associate Vice President – Partner Solutions and Technology

Support

Christina Baum, Vice President - Digital Transformation, CIO

Date: April 2, 2024

Re: Evidence for NWCCU Year 7 Self Study

Overview

Evidence gathered is related to the following excerpt from the report:

Key performance indicators are openly available to the public, ensuring transparency for university stakeholders to collect and analyze data. While university stakeholders still have the option to submit data requests through a service portal housed on the Business Intelligence and Research Services Department's website, the data dashboards significantly expedite the process and provide users with the necessary data more promptly and efficiently.

UVU publishes dashboards and documentation related to its key performance indicators on its public website: https://www.uvu.edu/birs/. Key indicators related to Academic Programs and other topics are represented by Tableau dashboards. Institutional indicators are included in the annual fact books.

BIRS is currently assembling and documenting institutional Key Performance Indicators (KPIs) and Measures, as identified through existing dashboards and executive presentations. We expect this list of KPIs and Measures to be one of the first action items of the newly established Data Governance Council, provided to other executive governance groups for comment, and approved by President's cabinet.

The Digital Transformation Division's <u>Beach Picture</u>, describes the future state of technology at UVU from the perspective of the user. Dx divisional leadership, directors, and staff goals roll up to the Vice President's annual goals which correspond to the Beach Picture.

Notable Milestones in Data Governance and Management Transformation

UVU's digital transformation efforts with data began with data governance and process change. Several key initiatives were completed by these two departments in partnership with the Business Intelligence Platform department and Dx leadership prior to the reorganization.

January 2022	Collibra Data Intelligence Platform - Contract signed
May 2022	Collibra Data Intelligence Platform - implementation and basic
	configuration complete. Included metadata ingestion for primary Banner
	SIS and select operational data store Oracle schemas.
	Collibra - Tableau Server metadata ingested
	Collibra - Power BI governed workspaces metadata ingested
November 2022	Use of Atlassian Jira platform standardized across IR and BI Services
	to track service requests and projects
February 2023	2 nd Annual UVU Data Summit – Introduced Data Visualization Style
	Guide
November 2023	3 rd Annual UVU Data Summit <u>View Recordings</u>
March 2024	Policy 445 – Institutional Data Governance and Management approved
	by Board of Trustees

Business Intelligence and Research Services

The attached evidence describes and supports the work performed at UVU to improve the accuracy of business intelligence and reporting, reduce dependency on manual changes and corrections to existing dashboards through automation, and implement a modern data governance program. Several teams and individuals within the digital transformation division have been involved in this effort, along with our partners throughout the university. However, the attached documents are related specifically to the work performed by the Business Intelligence and Research Services department since January 1, 2023. This date is just before a reorganization was initiated to combine the Institutional Research and Business Intelligence Services departments to better align resources and reduce duplication of effort.

After this reorganization, we necessarily focused some effort to document expected deliverables (see included BIRS Reporting Calendar.xlsx) and to stabilize and repair issues with existing business intelligence assets quickly. Included documents describing processes are current state, with the expectation of continuous improvement. Additional documents are included that list calendar items related to process discussions and presentations, completed projects that specifically support key performance indicators and building capacity in the BIRS team to be able to respond more effectively and quickly to new data needs. I have also included documentation related to the upskilling of BIRS analysts.

Key BIRS Accomplishments since January 2023

• August 2023: Completion of minimum skills training in Power BI, data visualization, communication, and customer service using Pluralsight and Linked In systems.

- November 2023: Reduction of project request backlog from 497 to 293 projects, through partnerships with divisional leaders.
- December 2023 to date: BIRS has held staff meetings where pertinent topics on process and technical questions were discussed and answered. In December 2023, we instituted regular meetings in order to provide additional support and to reinforce through repetition some concepts and to continue to assist team members in leveling up with the MS Azure platform and tools, and other technologies.
- February 2024: Completed review of multiple data repositories and filing methods, and movement of relevant code and documentation to a MS Sharepoint team site repository. Documents not in use were retained in an archive, or deleted if not relevant or past a seven year retention period.
- March 2024: Final approval of updated position descriptions and relevant reclassifications.

Included Files

- BIRS Director_Calendar Entries related to Key Performance Indicators and Data Process Improvement.pdf
- BIRS Learning Path Foundations.pdf
- BIRS Projects and Requests supporting KPIs Complete.xlsx
- BIRS Project Request Summary 11102023 Cabinet Update.xlsx
- BIRS Reporting Calendar.xlsx
- BIRS Retreat Documents:
 - o BIRS Retreat 2023 0519.docx
 - BIRS Retreat BI Process.pptx
 - Commenting Our Code.pptx
 - SQL Code Comment Header Example.txt
 - o Values, Virtues, and the Beach 051923.pptx
- BIRS Systems and Process Meeting Summary.pdf
- Cabinet Data Presentation for 20231016.pptx
- Collibra Implementation Screenshots.docx
- Dx Beach Picture 20221121.pdf
- Institutional Measures and KPIs Working Document as of 20240329.xlsx
- KPI List for Cabinet 20231012.xlsx
- UVU Data Visualization Style Guide v4.1.pdf

Director, BIRS Calendar Items Relevant to KPIs and Data Process

January 1, 2023 - April 1, 2024

Subject	Location	Start	End
Board of Trustees - Policy 445 - Data Governance and Management	FG Trustee's Room	3/28/2024 12:00 AM	13/29/2024 12:00 AM
Public Webpage Data	Conf Room BA214	3/25/2024 3:00 PM	3/25/2024 4:00 PM
Processes, Standard Definitions & Procedures to Freeze Data	DX 219	3/18/2024 2:00 PM	3/18/2024 2:45 PM
High Yield Programs ETL Project	DX 109	3/11/2024 11:00 AM	13/11/2024 11:30 AM
Executive Data Coordination	Microsoft Teams Meeting	3/7/2024 2:30 PM	3/7/2024 3:20 PM
High Yield Program tables and ETL Development - Scoping	DX 109	2/14/2024 8:00 AM	2/14/2024 8:50 AM
Dx Priority Dashboard Adjustments	DX 101H	2/12/2024 3:30 PM	2/12/2024 4:20 PM
Data Processes & Cabinet Deliverables	DX 101D	2/5/2024 8:00 AM	2/5/2024 8:50 AM
Data and Information JSM Form	DX 216	1/24/2024 4:00 PM	1/24/2024 4:50 PM
Discuss Data Processes	Teams	1/23/2024 3:00 PM	1/23/2024 3:50 PM
Data Requests and Whiteboarding	DX 101H	1/18/2024 8:00 AM	1/18/2024 9:50 AM
Data Platform, Reporting, and Dashboards	Dx 101H	1/8/2024 3:00 PM	1/8/2024 3:50 PM
Balanced Scorecard	Microsoft Teams Meeting	1/4/2024 2:30 PM	1/4/2024 3:00 PM
Ingesting of new data sources	Teams	12/14/2023 9:00 AM	12/14/2023 9:25 AM
BIRS Prioritization and Data Governance	Microsoft Teams Meeting	12/5/2023 4:30 PM	12/5/2023 5:00 PM
Cabinet Priorities and KPIs	Microsoft Teams Meeting	11/9/2023 4:00 PM	11/9/2023 4:50 PM
Certified Data Mark Brainstorm	Microsoft Teams Meeting	11/8/2023 2:00 PM	11/8/2023 2:30 PM
Data Governance / PowerBl	Microsoft Teams Meeting	11/2/2023 3:00 PM	11/2/2023 3:45 PM
High Impact Practices Data	Microsoft Teams Meeting	11/1/2023 11:30 AM	N 11/1/2023 12:25 PM
Collibra & Data Stewardship	Microsoft Teams Meeting	10/31/2023 10:00 A	M 10/31/2023 10:50 AM
Data discussion	Microsoft Teams Meeting	10/30/2023 4:15 PM	10/30/2023 5:05 PM
Inclusion-Related Data Dashboard Discussion	Microsoft Teams Meeting	10/25/2023 11:30 A	M10/25/2023 12:00 PM
Executive Data Coordination	Microsoft Teams Meeting	10/24/2023 11:30 A	M10/24/2023 11:55 AM
Data Platform, Reporting, and Dashboards	Dx 101H	10/23/2023 1:00 PM	1 10/23/2023 1:50 PM
Prioritization of Data Project Requests for BIRS	DX 101H	10/18/2023 2:00 PM	1 10/18/2023 2:50 PM
Data KPI's, Reports, and Quisitive Engagement	DX 101H	10/13/2023 9:00 AM	10/13/2023 9:50 AM
Census Data Stabilization	DX 216	10/3/2023 11:00 AM	10/3/2023 11:25 AM
Data Source Audit	Microsoft Teams Meeting		N 9/29/2023 10:50 AM
Partnership Directors/Cabinet Dashboard - look and feel	Microsoft Teams Meeting	9/27/2023 9:00 AM	9/27/2023 9:50 AM
Dashboards, Data Sources, and Collibra	Laura's Office	9/18/2023 1:00 PM	9/18/2023 2:00 PM
Datasource Audit touchpoint	Microsoft Teams Meeting	9/15/2023 10:00 AM	N 9/15/2023 11:00 AM
Discussion - Jira data into PowerBi and Data Lake	Microsoft Teams Meeting	9/14/2023 4:00 PM	9/14/2023 4:25 PM
Latino/Latina data for Val Peterson / President's Office	Microsoft Teams Meeting	8/9/2023 10:00 AM	8/9/2023 10:30 AM
Executive Data Coordination	Microsoft Teams Meeting	8/4/2023 2:00 PM	8/4/2023 2:50 PM
Evolve FM System Data	Microsoft Teams Meeting	8/3/2023 1:30 PM	8/3/2023 1:55 PM
Data Platform 101 Follow Up	DX 117	7/31/2023 3:00 PM	7/31/2023 4:50 PM
USHE Space Utilization / Transition	Microsoft Teams Meeting	7/14/2023 11:00 AM	17/14/2023 11:45 AM
Balanced Scorecard	Microsoft Teams Meeting	7/13/2023 10:30 AM	17/13/2023 11:00 AM

P&C Balanced Scorecard Data
President's data
Data Governance Policy Workshop
IA Data for Balanced Scorecard
Data Presentation for Cabinet
UVU Space Utilization
Data Strategies for Cabinet / UVU
IR and BIS Alignment, Structure, and Processes Meeting (Mandatory)
Balanced Scorecard
Balanced Scorecard Review

Microsoft Teams Meeting
Microsoft Teams Meeting
Riverside Country Club
Microsoft Teams Meeting
Microsoft Teams Meeting
Zoom Meeting
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Microsoft Teams Meeting
Conf Room BA214

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UVU Cabinet Meeting Dates where KPIs and Data Process were on agenda:

10/16/2023 11/13/2023 12/4/2023

The agendas for cabinet meetings are not available to staff. But, several of the meetings above were used to prepare for and respond to cabinet questions related to data processes.



Learning Path — Foundations May 19, 2023 ● Due August 15, 2023



Technical Skills

Toellillear Skills			
TASK	RESOURCE	DESCRIPTION	GOAL
REQUIRED	PluralSight's "Microsoft Power	Beginners? Complete "Modeling Data in Power BI" course by Stacia Misner Varga, then take the Skills IQ Assessment. Note the additional training	80% or higher in Skills IQ Assessment
Power BI	BI for Analysts"	suggested and complete it if score is below goal.	
Overview	path & learning		
	IQ assessment	Experience with PBI? You could take Skill IQ and then complete the	
		additional training suggested.	
REQUIRED	PluralSight	Complete at least one DAX-related course. We recommend this course from	Successfully complete
		Microsoft Training: https://learn.microsoft.com/en-us/training/paths/dax-	
DAX		power-bi/	
OPTIONAL	Microsoft Partners	Dashboard in a Day	
		7-8 hour virtual training	
		Good experience, plus ability to ask instructors questions; however, the "Modeling Data in Power BI" by Stacia Misner Varga course in Pluralsight covers a lot of the data modeling material they cover in the Dashboard in a Day. However, it does give users a thorough experience on using, designing, and manipulating visuals in Power BI.	
		URL for upcoming workshops: https://events.microsoft.com/en-us/allevents/?search=Dashboard%20in%20a%20Day&view=list&clientTimeZone=1	
REQUIRED	PluralSight	Take the "Data Visualization Literacy" skills assessment and complete the recommended training to close gaps in learning.	A passing score is "Average" or above.
Data Visualization		Once any additional training is complete, retake the skills assessment.	

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OPTIONAL	Linked In Learning	"Data Visualization for Data Analysis and Analytics" by Bill Shander	
Data Visualization		High level overview, with concepts needed to consider in dashboard design.	
OPTIONAL Data Storytelling	Book	 "Storytelling with Data" by Cole Nussbaumer Knaflic We will have a limited number of copies for check out. 	

Soft Skills

TASK	RESOURCE	DESCRIPTION	GOAL
REQUIRED	Linked In	• "Giving and Receiving Feedback" by Dr. Gemma Leigh Roberts – 48 mins:	Complete course, pass
	Learning	https://www.linkedin.com/lear ning/giving-and-receiving-feedback-	quizzes.
Communication		2017?contextUrn=urn%3Ali%3AlyndaLearningPath%3A1~AAAAAAAfm4Q	
		<u>%3D562280&u=2071428</u>	
		If you can't find it through this link, it is the first course listed in the UVU	
		curated courses.	
REQUIRED	Linked In	• "Customer Service Foundations" by Jeff Toister and Madecraft – 1 hour, 11	Successfully complete
	Learning	mins. https://www.linkedin.com/learning-	
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BUSINESS INTELLIGENCE
Brace Research Services

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Report prepare boy L. Bushy, Director, BRS

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rickey Resc news Clos news Clos	Katherine Brickey Resolv Geoff Matthews Closec Geoff Matthews Closec Christian Brinton Closec Geoff Matthews Closec Geoff Matthews Closec Douglas Nielson Closec	## Book	Rooms files from Facilities. S-306 Update to Race or Ethnicity Filter David Connelly Resolved 3/13/2023	10/28/202
news Clos news Clos	Geoff Matthews Closec Geoff Matthews Closec Christian Brinton Closec Geoff Matthews Closec Geoff Matthews Closec Douglas Nielson Closec	Geoff Mutthews	S-925 Remedial Information for Fact Book Eric Wilding Closed 3/8/2023	3/8/2023
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iews Clos	Geoff Matthews Closed	nnoard Geoff Matthews Closed 1/2/2022	15-1079 Head Count Dashboard Update Geoff Matthews Closed 1/3/2023 15-1079 Update Faculty Workload Dashboard Geoff Matthews Closed 1/3/2023	12/2/202
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BIRS Open and Backlog Projects

Updated 11/11/2023

10/12/2023 Cabinet Summary Table 10/12/2023 Lists 11/10/2023

									netaineu		
							Moved from Another	Moved to	as Service		
	Total Projects / Service Requests	Total Projects / Service Requests	Total Projects	Resolved	Cancelled	Added	Division	Another Division	Requests	Check Sum	
Student Affairs	151	150	80	16	61	10	4	3		0	
Academic Affairs	243	240	22	23	136			59	18	0	
Administration	0	0	0								
People & Culture	12	12	2	1	0	2		11		0	
Institutional Advancement	15	15	7	2	1	0		5		0	
Digital Transformation	56	56	131				75			0	
Finance	15	15	5	1	0	0		9		0	
Marketing & Communications	5	5	2	0	4	1	1	0		0	
Office of General Counsel	0	0	0				80	87			
		493	249						18	,	



Updated 01/21/2024					2023 Dates are listed from	I in gray text until we have updated calendars USHE and IPEDS for 2024-25			
Report Name / Deliverable	Delivered to:	Received From / Dependency	Delivery Date (Month)	Month	BIRS Internal Review Date	Delivery Date (Day of Year)	Frequency	BIRS Area	Notes
Fall EOT (Student, Student Course, Course Files)	USHE	NSC, BIRS	January	1	1/5/2024	1/19/2024	Annual	Compliance	
Revisions: Summer EDT WAESO Finance Dashboard	USHE USHE Academics	BIRS BIRS Finance Division	January January January	1	1/5/2024 1/11/2024 1/16/2024	1/19/2024 1/18/2024 1/22/2024	Annual Annual Annual	Compliance Compliance Compliance	
Faculty Hishocard Alumni	Academics Academics Non Specific Various Users	Academic Affairs Division Alumni Services	January January January	1 1	1/16/2024 1/16/2024 1/22/2024	1/22/2024 1/22/2024 1/31/2024	Annually	Compliance Confliance Collection and Research	
CE Registration	Concurrent Enrollment	Enrollment	January	1		1/31/2024	Semi-annually	Collection and Research	
Non Returning Survey F2F (NRS)	SA	F NRS) Jalu	January	1		1/31/2024	Annually	Collection and Research	
150%/200% Graduation Rates	IPEDS	Finance Division	February	2			Annual	Compliance	
Student Financial Aid	IPEDS	Finance Division	February	2	1/22/2024 1/26/2024	2/7/2024	Annual	Compliance	
Financial Aid Revisions: Historical Financial Aid	USHE USHE	Finance Division Finance Division	February February	2	1/26/2024 1/26/2024	2/9/2024 2/9/2024 2/9/2024	Annual Annual	Compliance Compliance	
IPEDS Outcome Measures Spring 3rd Week	IPEDS USHE	Finance Division NSC, BIRS	February February	2 2	2/7/2024 2/9/2024	2/21/2024 2/16/2024	Annual Annual	Compliance Compliance	
DWS Match: O4 Wages CSRDE Section 1	USHE Consortiuum of Schools for Retention and Data Exchange	DWS BIRS	February February	2	2/16/2024 2/22/2024	2/23/2024 2/29/2024	Quarterly Annual	Compliance Compliance	
Clery Act	recention and Date Exchange	Campus Police	February	2		2/2/2024	Annual	Compliance	The office that requests this has changed each year, but we do expect to be asked to produce data for this report. We believe it will come from the
	SA			2			Semi-annually	Collection and Research	asked to produce data for this report. We believe it will come from the university compliance area. Cortney to check.
New Student Onboarding Survey (NSOS) Canceled Fact Book	SA UVU	New BIRS	February	3	2/14/2024	2/28/2024 3/1/2024	Annual	Conection and Research Compliance	
Spring Missionary File Spring Cohorts Creation (there are 2: First Time and Transfer)	USHE none (updated in UVUODS)	USHE Student Affairs Division	February March	3	2/23/2024 3/6/2024	3/1/2024 3/13/2024	Semi-Annual Semi-Annual	Compliance Compliance	
Student Athlete Report Campus Climate Survey	IPEDS CIDO/ Campus Inclusion	Athletics Division Campus	March May	3	3/8/2024	3/15/2024 5/1/2024	Annual Every other year	Compliance Collection and Research	
Graduation Commencement Data	Committees University Marketing	Instutional Advancement	April	4		5/1/2024 4/1/2023	Fall, Spring, Summer	Conection and Research Compliance	
Finance	IPEDS	Division Finance Division	Aeril	4	3/28/2023	4/5/2023	Semi-Annual	Compliance	
Human Resources Academic Libraries Fall Enrollment	IPEDS IPEDS IPEDS	People and Culture Division Academic Affairs Division Admissions	April April April	4	3/28/2023 3/28/2023 10/12/2023	4/5/2023 4/5/2023 4/5/2023	Annual Annual Annual	Compliance Compliance Compliance	
IPEDS Spring Submissions	IPEDS	BIRS	April	4	4/3/2024	4/17/2024	Annual	Compliance	
Open Doors	International Student Services		April	4	4/7/2024	4/15/2024	Annual	Compliance	
CSRDE Sections 2 and 3	Consortiuum of Schools for Retention and Data Exchange	BIRS	April	4	4/8/2024	4/15/2024	Annual	Compliance	
Enrollment Calls - Summer Canceled	Enrollment Services/ SA	Enrollment	April	4		4/30/2023		Collection and Research	
Cost of Attendance Survey (COA)	Financial Aid	Survey COA) Jpln	April	4		4/30/2023	Every other year	Collection and Research	
National College Health Assessment (NCHA)	Dean Of Students / SA	Assessment NCHA) Jplo	April	4		4/30/2023	Every other year	Collection and Research	
DWS Match: Q1 Wates General Employer Survey	USHE None	DWS	May May	5	5/17/2024	5/24/2024 5/31/2023	Quarterly Every 3 years	Compliance Collection and Research	
Employer Supervisor Survey	None	Supervisor Survey Yale	May	5		5/31/2023	Every 3 years	Collection and Research	
Excelerate Calls	Innovation Academy / AA	Excelerate Calls Sala	May	5		5/31/2024	Annually	Collection and Research	
Student Opinion Survey (SOS) Spring	Multiple	Student	May	5		5/31/2024	Semi-annually	Collection and Research	
Great Colleges	People and Culture	Great Colleges Salo	May	5		5/31/2023	Every other year	Collection and Research	
Spring EOT Revisions: Fall EOT	USHE	BIRS BIRS	June June	6	6/7/2024 6/7/2024	6/14/2024 6/14/2024	Annual Annual	Compliance Compliance	
Graduation Web Survey Grade Updates Historical Financial Aid	AA USHE USHE	Graduation Registrar Finance Division	June July	7	6/23/2023	6/30/2024 7/7/2023	Annually Annual Annual	Collection and Research Compliance Compliance	
HEA Student Right to Know	Athletics	HEA	July 1-Jul	7	6/23/24	7/1/2024	Annual	Compliance	Eric performs an annual review of the requirements to make sure nothing has changed. Has SQL queries to complete the report if it is the same. If not, Effort
									may increase. Athletics supplies a manual list, BUT
Healthy Minds Survey National Survey of Student Engagement (NSSE)	Dean Of Students / SA AA USHE	Minds Survey Yulo	July July	7		7/31/2024 7/31/2022	Every other year Every other year	Collection and Research Collection and Research	currently not resistered for Spring 2024 need resistration before OCT 1st 2023
Perkins list sent out Program File DWS Match: O2 Wages	USHE USHE USHE	Finance Division BIRS DWS	July August August	8	8/4/2023 8/4/2023 8/7/2023	8/11/2023 8/11/2023 8/25/2023	Annual Annual Ouarterly	Compliance Compliance Compliance	
Fall Missionary File Register Key Holder	USHE IPEDS	Student Affairs Division IPEDS	August August	8	8/14/2023 8/22/2023	8/25/2023 8/31/2023	Semi-Annual Annual	Compliance Compliance	
IPEDS Registration Institutional Characteristics (IC) Header	IPEDS IPEDS	IPEDS BIRS	August August	8	8/22/2023 8/22/2023	8/31/2023 8/31/2023	Annual On-time	Compliance Compliance	
Report Mappine Enrollment Calls - Fall Canceled per discussion Andrew Stone	IPEDS Enrollment Services/ SA	BIRS Enrollment	August August	8	8/22/2023	8/31/2023 8/31/2023	Annual 3 times per year	Compliance Collection and Research	File documentation on Andrew Stone's decision to cancel Enrollment calls before removing from calendar.
Space Inventory Summer EOT	USHE	Academic Affairs Division NSC, BIRS	September September	9	8/14/2023 9/1/2023	9/1/2023 9/15/2023	Annual Annual	Compliance Compliance	before removing from covernor.
Revisions: Sorine EOT Graduation Report	USHE	BIRS Registrar	September September	9	9/7/2023 9/15/2023	9/15/2023 9/22/2023	Annual Semi-Annual	Compliance Compliance	
Revisions: Graduation (Prior Year) Perkins Participants List Timely Completions (TC) Exclusions	USHE USHE USHE	Registrar Finance Division Academic Affairs Division	September September September	9	9/15/2023 9/22/2023 9/22/2023	9/22/2023 9/29/2023 9/29/2023	Annual Annual Annual	Compliance Compliance Compliance	
CE Registration	Concurrent Enrollment	Enrollment	September	9		9/30/2023	Semi-annually	Collection and Research	
Fall 3rd Week Institutional Characteristics	USHE IPEDS	NSC, BIRS BIRS	September October	10 10	9/29/2023 10/12/2023	10/6/2023 10/19/2023	Annual Annual	Compliance Compliance	
Timely Completions 12 Month Enrollment	IPEDS IPEDS	Academic Affairs Division Artmissions	October	10	10/12/2023 10/12/2023	10/19/2023 10/19/2023	Semi-Annual Annual	Compliance	
TC Cohort New Student Onboarding Survey (NSOS)	USHE SA	Academic Affairs Division New	October October	10 10	10/13/2023	10/20/2023 10/31/2023	Annual Semi-annually	Compliance Collection and Research	
DWS Match: Q3 Wages	USHE	DWS	November	11	11/17/2023	11/24/2023	Quarterly	Compliance	
Summer and Fall Cohorts Creation (there are a total of 4)	BIRS, Student Affairs Division	BIRS	November	11	11/2/2024	11/9/2024	Annual	Compliance	
Moody's Report CUPA	Finance People and Culture	Moody's BIRS	November November	11 11	11/5/2024 November	11/12/2024 November 12/8/2023	Annual	Compliance Compliance	
Faculty Workload Report -S11 Veterans Report Dean's Merit	USHE USHE Dean Of Students / SA	Academic Affairs Division Admissions Budget Office	December December Fall Term (December)	12 12 12	12/1/2023 12/1/2023 12/7/2024	12/8/2023 12/15/2023 12/16/2024	Semi-Annual Annual	Compliance Compliance Compliance	
Enrollment Calls - Spring Canceled	Enrollment Services/ SA	Enrollment	December December	12	12/1/2024	12/31/2023		Collection and Research	
Student Opinion Survey (SOS) Fall	Multiple	Student	December	12		12/31/2023	Semi-annually	Collection and Research	
OTL Data Services	Office of Teaching & Learning Institutional Advancement		EOT	12,5	December, May	December, May	2 X Semester	Compliance	
Graudation Report for Alumni and Institutional Advacement Budget Office FTE Report	Institutional Advancement Budget Office	Graudation Finance Division	December, June, September 3rd Week & EOT	6,9,12 8. 12. 1. 5	TBD	August, December, January, May	Once Each Semester 2 X Semester	Operational Reporting Compliance	
Emergency Services	Emergency Services Supt	BIRS	Quarterly	8, 12, 1, 5		Upon Request	Quarterly	Compliance	Usually requested by Emergency Services; data provided upon request
Performance Goals Common Data Set SEGO High Impact Practice Survey	USHE IPEDS AA	UVU Exec. Crnte. BIRS SEGO	Exact Date TBD Exact Date TBD	TBD TBD	TBD TBD	TBD TBD	Annual Annual	Compliance Compliance Collection and Research	
Transportation Survey (TS)	AA Facilities and Planning	Transportation					r Every 10 years	Collection and Research	
Active Students with SOWK Attribute	College of Humanities	SOWK Attribute Eern	September, January,				Once each semester	Operational Reporting	
ASD Student Graduation Data			May						
Pour student oradiation bata	Office of Accessibility Services	Graduation Data Aary	January, May, August				Once each semester	Operational Reporting	
Canvas Usage	AVP of Student Success	Canvas	September, February, June				Once each semester	Operational Reporting	
Civitas Usage Report	Academic Affairs / Student	Civitas	January, February, March, April, May, June				Monthly	Operational Reporting	
	Affairs Leadership		March, April, May, June July, August, September, October,	t.					
			November, December						
Developmental Math Prerequisites Audit Report	Math Department	Audit Report Turn	August, January, April				Once each semester	Operational Reporting	
Engagement Ops Dashboard	Academic Advising	Ops Dashboard Der	January, February, March, April, May, June				Monthly	Operational Reporting	
			July, August, September, October, November, December						
Enrolled Students from Hawaii High Schools	Multicultural Student Services	High Schools Ser	September, February,			9/19/2022, 2/6/2023, 6/5/2023	Once each semester	Operational Reporting	
			June						
Enrolled Students with AS, CS, AD, CD, CP Academic Standing Rep	or Academic Standards	Standing Report Tare	May, July			5/22/2023, 7/14/2023	Summer Semester, twice	Operational Reporting	
New Faculty Users for Inspire	Academic Affairs	for Inspire Eer	January, February,				Weekly	Operational Reporting	
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Top 30 Course Engagement	AVP of Student Success	Тор	January, February, March, April, May, June July, August,				Weekly	Operational Reporting	
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Vision 2030 Balanced Scorecard Credit Prior Learning Assessment	University Executive Council USHE	Credit	October				On Demand Annually	Operational Reporting Operational Reporting	This is a USHE report that has been provided, collaborating with the Registrar's office and Academic Affairs.
School of Education and Secondary Enrollment Dashboard	School of Education	School	October, March, June				Once Each Semester	Operational Reporting	AND

LEGEND

DWS = Dept. of Workforce Services

DGI = Degree-granting Institution

EOT = End of Term

IPEDS = Integrated Postsecondary Education Data System (Federal)

TC = Timely Completions

USHE = Utah System of Higher Education (State)

NOTES

1/19/2024: USHE reporting calendar has not been released for 2024-25. Specific due dates will be missing until we receive the calendar.

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AGENDA

BIRS Retreat

May 19, 2023 8:00 AM – 4 PM
Rules of Engagement
Location

1:30 PM

Choose to be present. Be serious but have fun. Assume positive intent. Open

minds. Everyone participate, no one dominate.

Location	SC 208, Bowling alley for activity							
Materials	Data Visualization Style Guide, Dx Beach Picture, Development Process Docs							
8:00 AM	Continental Breakfast							
	Fresh Fruit Assortment, Pancakes, Hash Browns, 2 Strips of Bacon, Scrambled Eggs, Strawberries, Whipped Cream, Maple Syrup, Water / Juice							
8:30 – 9:00 AM	Introduction Values, Virtues, and Going to the Beach (Vision)	Facilitator: Laura						
9:00 – 9:30 AM	Exceptional Results: Documenting Our Code	Facilitator: Geoff						
9:30 – 10:00 AM	Exceptional Accountability & Results: Style Guide	Facilitator: Laura						

	Style Guide	
10:00 – 10:15 AM	Break	
10:15 – 11:15 AM	Exceptional Results: Feedback on Development Process Steps	Facilitator: Kari
11:15 – 11:45 AM	Exceptional Care: Customer Service	Facilitator: Todd
11:45 AM – 12:15 PM	Break and Get Lunch Chicken and Alfredo Pasta, Spinach Salad, Roll, Cookie, Water	

Learning Paths 12:15 - 1:00 PM Facilitator: Laura

Activity

UVU Bowling Alleys Student Life & Wellness Center

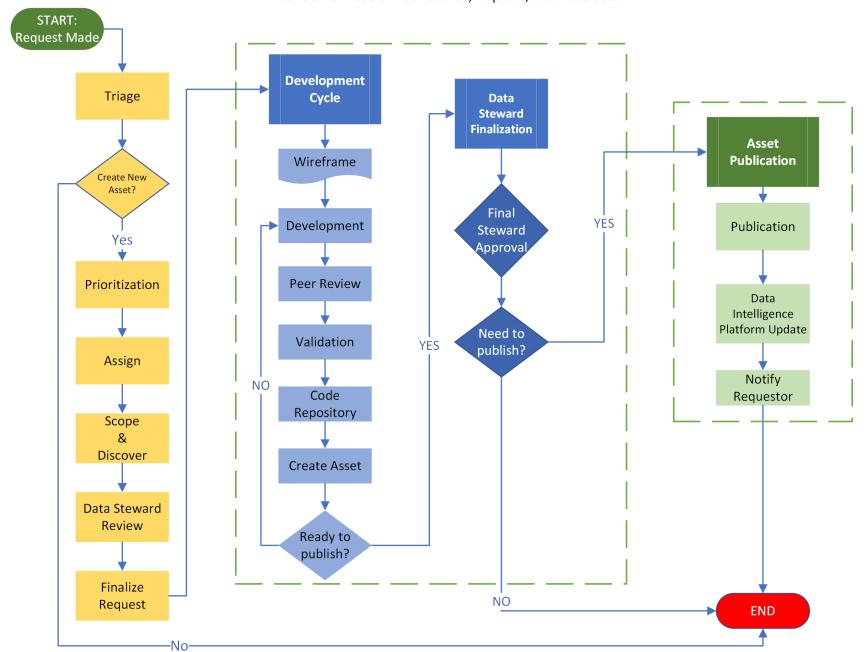
BI Development Process

BIRS Retreat

May 2023

Business Intelligence Development Flow v2 - *Developers*

Consumer Assets: Dashboards, Reports, and Data Sets



What is it?

- Standardized process data developers follow to complete data projects.
- Data developers can be any employee authoring a data asset which will be published and shared with others
 - Not just BIRS Employees

Outcomes / Benefits

- Consistency in development of data assets
- Reduce redundant work avoid redevelopment
- Other outcomes?
 - Clarity
 - Getting expectations upfront from customer

Process...

 Developer does not surrender professional judgment on how to complete project.

- External Partners should not be unduly burdened by process
 - Developer needs input and subject matter expertise from External Partners

Order of Steps

- Steps may be re-ordered or merged as necessary for a specific project
- Examples:
 - You use SQL already peer reviewed and validated in another project; "peer review" phase in your project may be colleague reviewing final product.
 - Wireframe was completed earlier in project by another analyst

"Skipping" Steps

- Not all steps need to be "completed" but should still be acknowledged; Examples:
 - Wireframe wasn't drawn because customer's needs were simple enough to be described over text. (I need a table with these three filters)
 - Wireframe step was merged with Scope and Discovery step
 - Data steward's review was collected during Triage or Prioritization phase
- Data Stewards should review and approve. Developer should not be setting customer priorities.

Commenting Our Code

Business Intelligence & Research Services

Why Comments

- Better Process
- Easier to migrate
- Empathy
- Do Not Say:
 - "My Code is self commenting."

Where To Comment

- Header
 - Title for Query/Report
 - Brief Description
 - Parameters, if any
 - Database Source
 - Banner Prod
 - Banner Reports
 - UVUODS
 - MS Azure
 - Audience

- Author & Date
 - As changes are made, add the contributor and when
- Change Control
 - What changes were made, and when were they made?

In-Line Comments

- Focus on 'What' is happening such as with
 - Case Statements
 - Sub Queries
 - Calculations
 - WHERE statements that need updating

TITLE OF QUERY/REPORT

Advisor Assignment Audit Report

BRIEF DESC - WHAT THE QUERY IS INTENDED TO DO, THE DATA ELEMENTS RETURNED IN THE RESULT SET

Generates a list of currently enrolled students and the Advisors who are assigned to them.

PARAMETERS - DATA ELEMENTS USED TO FILTER OR RESTRICT THE QUERY RESULTS :Term Code - Term Code of the Enrollment Semester

DATA SOURCE/INSTANCE

Banner PROD/REPORTS

AUDIENCE AND REQUESTOR

Advisors, Katherine Brickey / Vincent Dreyer / Elaine Lewis

AUTHOR, DATE

D. Palmer

L. Busby 10/21/2022 Adapted for Mongoose Cadence File Upload

K.Gary and T.McKell 4/27/2023 Added Preferred First Name; adjusted for FERPA confidentiality

---- CHANGE CONTROL ----

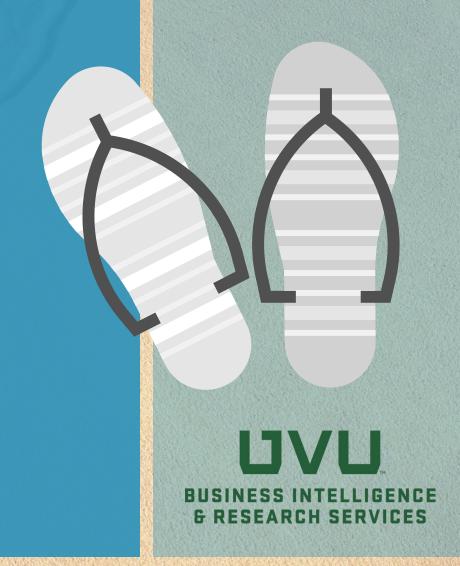
DATE CHANGE MADE

10/21/2022 Removed fields not needed, added phone number

4/27/2023 Updated first name to default to preferred name; changed phone numbers to "confidential" where confidentiality requested

Values, Virtues, and Going to the Beach

Retreat • May 19, 2023



Dx Values

ACCOUNTABILITY

- Results
- Goal Oriented

INTEGRITY

- Trust
- Loyalty
- Teamwork

EMPATHY

- Service Oriented
- Caring
- People Smart

EFFECTIVE COMMUNICATION

- Transparency
- Respect

DRIVEN TO EXCELLENCE

- Improvement
- Growth
- Innovative
- Explorative



Dx Values

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EFFECTIVE COMMUNICATION

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DRIVEN TO EXCELLENCE

- Improvement
- Growth
- Innovative
- Explorative



Team Player Virtues

HUMBLE

Lack excessive ego or concerns about status

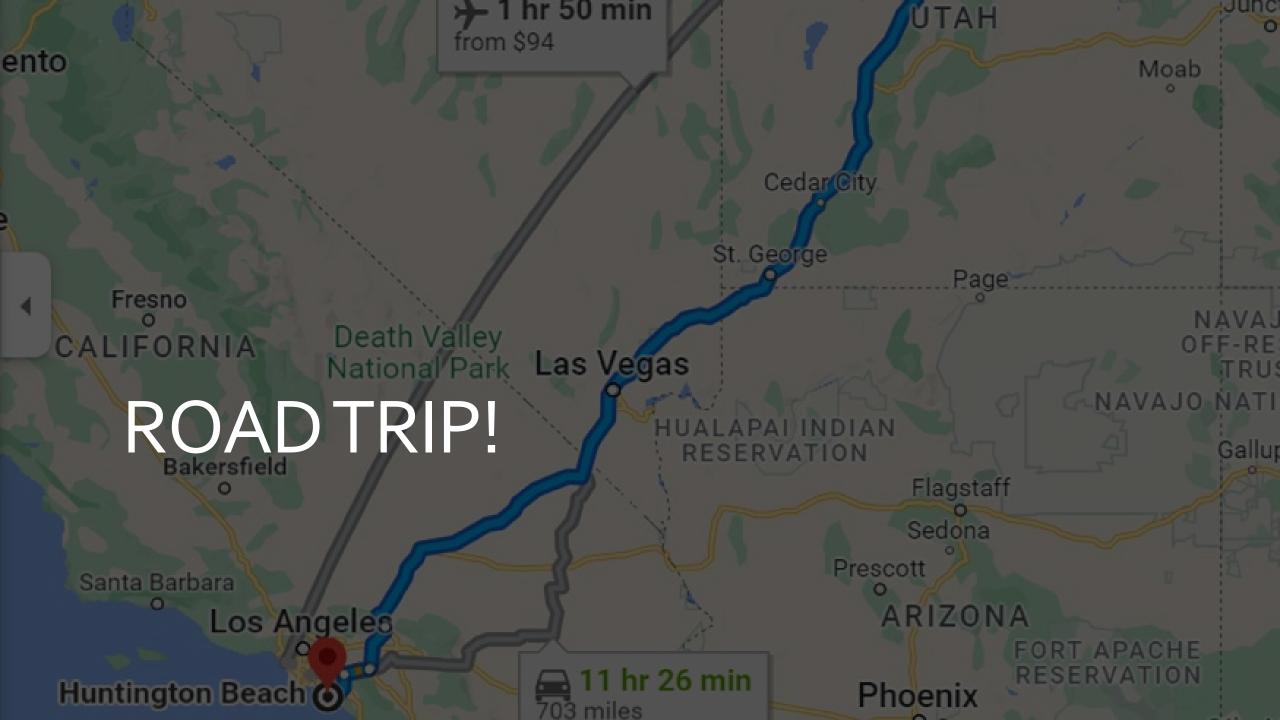
Share credit, emphasize team over self, and define success collectively

HUNGRY

Self-motivated and diligent
Constantly thinking about the next step and the next opportunity

SMART

Common sense about people Interpersonally appropriate and aware



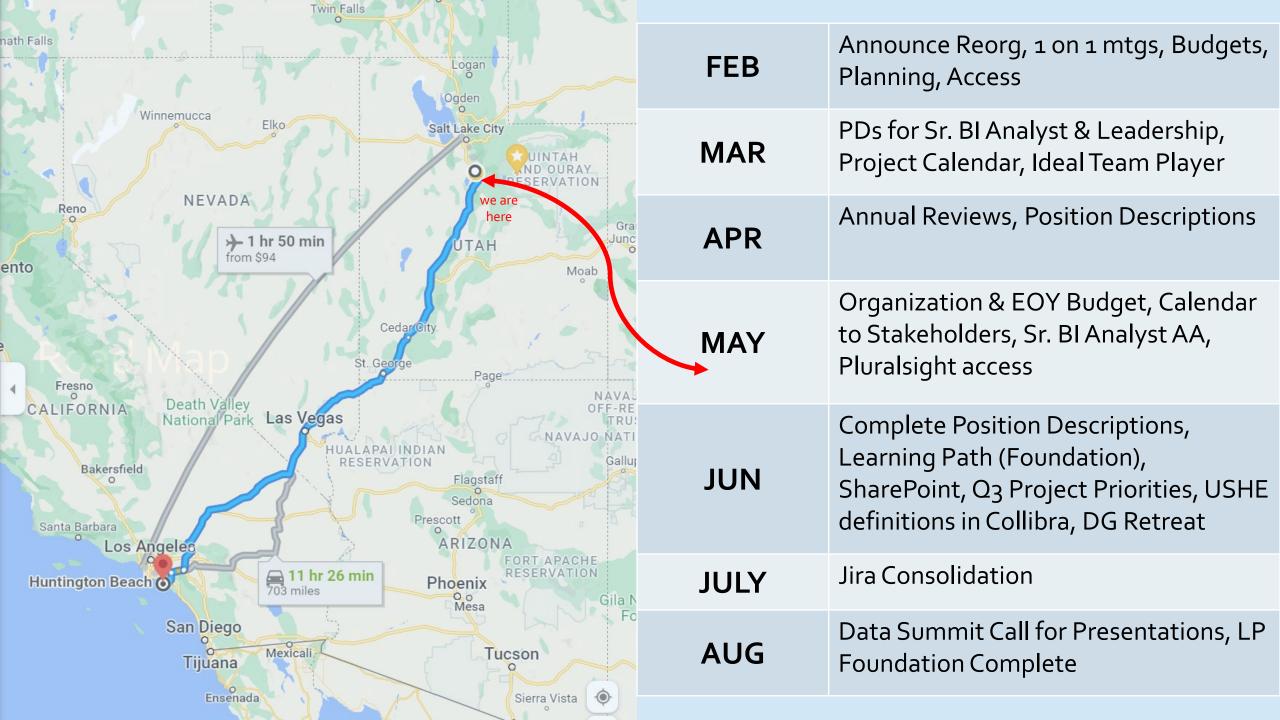
Data Management Alignment

- **A** UVU is a recognized innovator and **thought leader** in higher education digital transformation
- H Employees can easily access and act on information via their intranet/mobile apps
- K Employees can access personalized and curated data to make informed decisions
- M Individuals can get *real-time answers* to their questions
- P Users access **standard technologies** via self-service and request exceptions via a clear process
- S All workflows are optimized, documented, and digitized
- T Data is governed, reliable, secure, and available via self-service
- W Products and services are designed with an "end-user-first" approach
- Y Architecture standards are documented, published, and followed



Division Definitions Key Insights Survey Self-Service Partners Validation • UX Intelligence Policy & Research Ops • Data esea Lab Reporting Standards Quality Dashboards Market Priorities Research Indicators Consulting 8 Governance usiness Collecti m

STANDARDS & PROCEDURES ● SKILLS & TRAINING ● DATA COLLECTION SYSTEMS ● DATA PLATFORM TOOLS ● DATA LITERACY INITIATIVES



Opportunities and Partnerships



- Dx Priorities to Cabinet: Transformation
 - High Priority Data Silos
 - Reduce Ad hoc, Increase Self-Service
 - Governance Policy, Business Definitions
 - Data Summit
- Market Research, Other Data Research Tools, UX Lab, and Grant Support
- Data quality assessment; business process support
- Balanced Scorecard & Key Indicators
- Website & Dashboard Refreshes
- Metric Publication, Accountability to Cabinet
- Formal Reporting for Strategic Planning & Assessment
- Data Intelligence Platform Maturity
- Civitas filters and updates
- SRI Pilot
 BIRS external peer review, Mature and maintain
- Define data models for Azure

Are we there yet?





From: Kari Gary
To: Laura Busby

Subject: BIRS Systems and Process Meeting Summary Date: Thursday, March 28, 2024 9:54:05 AM

Attachments: <u>image001.png</u>

Laura, these are the training topics covered in the BIRS training and process series. Did you also want information on the onboarding / foundational training we standardized in the past year?

BIRS Systems and Process Training Past Topics and Future Topics

December

• 12/11/2023: SQL and introduced training resources.

January

- 1/08/2024: SQL: levels of proficiency in SQL; discussed basic to intermediate concepts.
- 1/22/2024: Using JIRA; Processes for using JIRA; when to use statuses
- 1/29/2024: Advanced SQL; discussed aggregation and analytic functions.

February

- 2/05/2024: Using JIRA for logging time in order to estimate work.
- 2/12/2024: Open Q&A for team.
- 2/26/2024: Customer Service Principles and Practices for BIRS.

March

3/25/2024: Power BI

Future Training Planned

• April 2024: Power BI

• May 2024: Data Governance System



KARI GARY

UTAH VALLEY UNIVERSITY

Manager BI Development and Operational Reporting Business Intelligence and Research Services

Kari.Gary@uvu.edu (801) 863-5935

From: Kari Gary

Sent: Wednesday, February 14, 2024 11:09 AM

To: Laura Busby <Laura.Busby@uvu.edu>; Todd Harper <THarper@uvu.edu>; Cortney Brewerton <Cortney.Brewerton@uvu.edu>

Subject: BIRS Systems and Process Meeting Summary

All, this is a summary of the past topics we've held. Todd and Cortney, please add any details I may have missed. Laura, is this generally what you are looking for from the BIRS leadership team for summaries?

BIRS Systems and Process Training Topics Covered as of 2/14/2024

December

 12/11/2023: Introducing meeting series; discussed SQL and introduced training resources.

January

- 1/08/2024: SQL
 - Discussed levels of proficiency in SQL; discussed basic to intermediate concepts.
- 1/22/2024: Using JIRA
 - Processes for using JIRA; when to use statuses
- 1/29/2024: Advanced SQL
 - Recapped previous topic; discussed aggregation, analytic functions.

February

- 2/05/2024: Logging time in JIRA and discussion on future topics team would like to see in training.
- 2/12/2024: Open Q&A for team experimental time; what questions do you have, are you struggling with anything.
 - Team seemed to like the format, but requested advanced notice on when we'll have a Q&A session.

BIRS Leadership to meet 2/15/2024 to plot out next 4 – 6 training weeks.



UTAH VALLEY UNIVERSITY

Manager BI Development and Operational Reporting Business Intelligence and Research Services Kari.Gary@uvu.edu

(801) 863-5935



Today's Agenda

- Data Strategy
- Priorities
- Project requests by Division
- Top 10 Priorities
- 73 KPIs
- "Certified Data"
- Automation





BIRS and Data Requests

Data to Al Maturity



Manual Data Drudgery

Manual reports

Spreadsheets & PowerPoints communicate status

Disagreements on how data was processed



Death by Dashboards

Shadow data teams

Only privileged employees can create reports

Big spend on reporting, dashboarding or BI systems

Employees flooded with irrelevant data

Multiple, inconsistent sources of truth



Data Tells A Story

Glance-able answers start to simplify employee processes

Multi-source data merging

Consistent view of info up & down the organization

IT & business leadership coordinate work

Measurable results emerge



Emerging Intelligence

Consistent measurable results

Proactive information supports employees

Experience tuned for each customer and employee

Smart systems know what to look for

Data crosses silos



Transformed Organization

AI/ML is real

New ways of working

Employees focused on high value work, all low value work automated

Recommendations are right for the employee

New business models emerge



Desired Future State Maturity



BIRS and Data Requests





Data Project Requests

Department	Data Project Requests
Academic Affairs	243
Digital Transformation	56
Finance	15
Institutional Advancement	15
Marketing and Communications	5
Office of General Counsel	0
People and Culture	12
Student Affairs	151
TOTAL	497*

^{*}Note: The same team is also supporting break fix/tickets for Civitas, SRIs, and Faculty Success/Watermark



Each Department to Prioritize their "Top 10"







E.g., Academic Affairs Top 5

Priority	Project	Date Needed
1	USHE 3-year follow-up data	October 17
2	Gray Associates	October 20
3	Timely completion & high-yield awards	October 17
4	Aggregated data for external partnerships on Balanced Scorecard	March 2024
5	Faculty master spreadsheet	March 2024



Merging Priorities





What are our priorities?



ACCURACY



SPEED



Top KPIs (73 identified, 32 "certified")

Row Labels	▼ Count of Primary Measure Count of Validated
■ Christina Baum	6
⊞ Employment - Hours per Week	1
⊞ Employment - Status	1
⊞ Family Status	1
⊞ Marital Status	1
⊞ Service Area Economic Statistics - Unemployment	1
■ UVU Service Desk First Response Time	1
■ Jim Mortensen	1 1
■ UVU Comparative Tuition & Fee Rate	1 1
■ Kara Schneck	3
⊞ Community Awareness (MarComm)	1
⊞ Engagement (MarComm)	1
⊞ Sentiment (MarComm)	1
■ Kyle Reyes	5 4
■ Fundraising: Annual Number of Alumni Gifts	1 1
⊞ Fundraising: Major Gifts	1 1
⊞ Fundraising: Principal Gifts	1 1
⊞ Fundraising: Total Annual Gifts	1 1
⊞ UVU Alumni Residency	1
■ Marilyn Meyer	2
⊞ Full-Time Employee Internal Hire	1
⊞ Full-Time Employee Turnover Ratio	1

Top KPIs (73 identified, 32 "certified")

Michelle Kearns	34	1
±4 Year Graduation Rates	1	
∄ 6 Year Graduation Rate	1	
∄ 6 Year Graduation Rate (Outcome Measure) for Underrepresented Students	1	
∃ 6 Year Graduation Rate by Race/Ethnicity and International	1	
∃8 Year Graduation Rate (Outcome Measure)	2	
■8 Year Graduation Rate (Outcome Measure) By Award Type, Gender, and Award Year	1	
∃8 Year Graduation Rate (Outcome Measure) for Underrepresented Students	1	
∃8 Year Graduation Rate (Outcome Measure) Trendline and Predictions	1	
∃ 8 Year Graduation Rate (Outcome Measure) vs. Peers	1	
∃ Enrollment Rate for Underrepresented Students	1	
∃ FAFSA Completion	1	
∃ First Generation	1	
∃ Gender	1	
∃Institutional Open Admissions Status	3	
∃ Outcome Measure Impact	1	
∃ Participation in PK-12 Programs	1	
∃ Pell-eligible Students	1	
∃ Performance Funding: Access	1	
∃ Potential Completion Rates	2	
⊞ Race/Ethnicity	1	
∃ Remediation - Math	1	
∃ Student Age Groups / Adult Learners	1	
⊞ Student Belonging - UVU	1	
∃ Student Belonging - UVU Community/Social	1	
∃ Student Culture - Debt?	1	
∃ Student Enrollment / Population by Race and Ethnicity	1	
⊞ Student Enrollment / Population by Residency Status	1	
⊞ Student Time Status	1	
⊞Top Student Barriers to completion	1	
	1	



Top KPIs (73 identified, 32 "certified")

■ Val Peterson	2	2
⊞ Room Utilization Rate by Room Type	1	1
⊞ Seat Occupancy Rate by Room Type	1	1
■ Wayne Vaught	20	13
■ Awards - by USHE Institution	1	1
⊞ Awards - by USHE Institution, Year over Year Change	1	1
⊞ Awards - UVU	1	1
⊞ Comparison of Awards to Cost	1	
⊞ Completions by Academic Year	1	:
⊞ Coordinating 6-Year and 8-Year Bachelor Graduation Rates	1	
⊞ External Partnerships	1	
⊞ Fully Online Programs	1	:
⊞ General Education Average Fill Rate by Course Modality	1	:
⊞ Graduates	1	:
⊞ Graduation Outcome Measure Comparison to USHE PBF Timely Completion	1	
⊞ High Impact Practices (HIPs) Completion	1	
⊞ Number of Graduates	1	:
⊞ Performance Funding: High Yield Awards - All	1	;
⊞ Performance Funding: High Yield Awards - Underrepresented Students	1	:
■ Performance Funding: Timely Completion	1	:
⊞ Prior Learning Credits	1	
⊞ Retention Rate (overall)	1	
⊞ Retention Rate by Cohort, vs. Peers	1	
⊞ Student Retention Rate by Race and Ethnicity, International	1	:
Grand Total	73	32

Marketing Symbols









Unique Characteristics of UVU Students

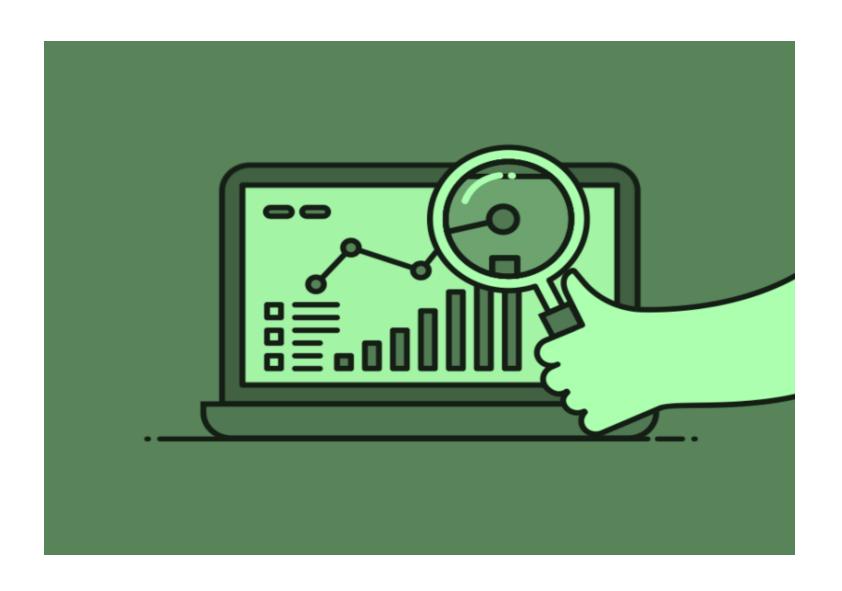
- •37% are first-generation students 🕵
- •29% are age 25 or older
- •37% are married or in a partnership
- •14% support at least one child
- •82% are employed
- •28% work more than 31 hours per week
- •19% are students of color 🥋

"UVU students are often balancing careers, school, and family...Supporting their need for flexibility through the use of technology enhances student success."

~ President Tuminez, 2022



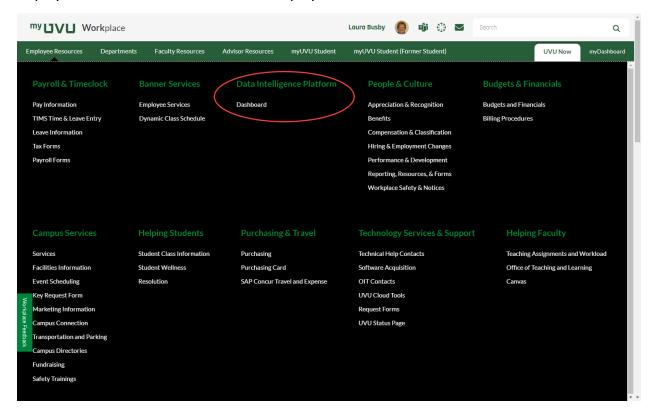
Next Step – Automation (top 35 reports)



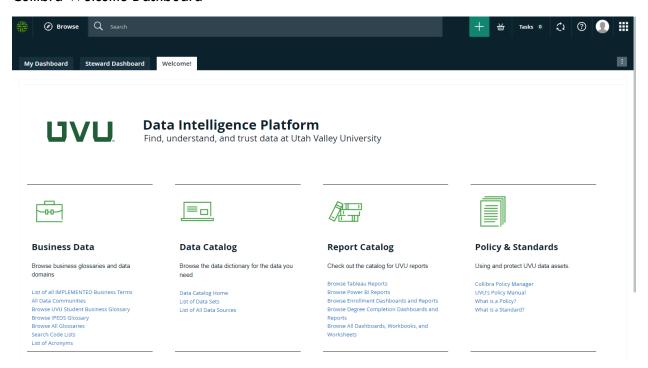


UVU's implementation of the Collibra Data Intelligence Platform - Basic Views

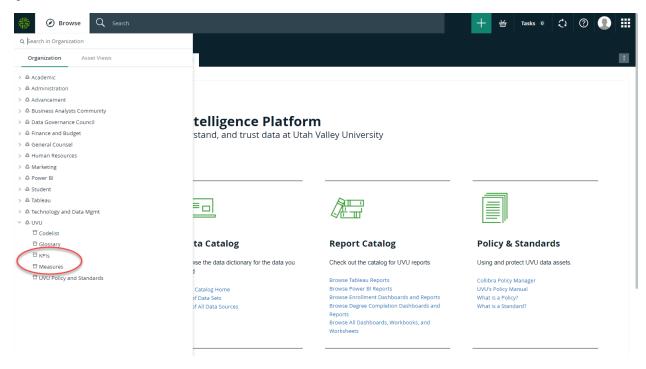
Employee Portal - Licensed for all UVU Employees



Collibra Welcome Dashboard



UVU data domains represented as Collibra communities; Institutional KPIs and Measures glossaries



DIGITAL TRANSFORMATION

BEACH PICTURE: A-Z

Our Mission is...

to **lead** UVU's digital transformation by providing **reliable**, **state-of-the-art** solutions for our **teaching**, **learning**, and **work** environments that are **intuitive**, **transparent**, and **delightful** to use.



Community Outreach

- **A** UVU is a recognized innovator and **thought leader** in higher education digital transformation
- **B** Dx provides substantial **engaged learning** experiences for students
- C Dx employees engage socially and professionally at UVU and in the technology community
- D Dx leverages the power of *artificial intelligence* and machine learning

User Experience

- E Students and faculty have a *consistent experience* with technology from class to class
- F Technology is primed and **ready prior to the first day** of class or work
- G Students can easily access and act on information via their intranet/mobile apps
- **Employees** can easily access and act on information via their **intranet/mobile apps**
- Students can access necessary technology **resources on and off campus**
- J Users' communication methods are simplified, standardized, and consistent
- K Employees can access personalized and *curated data* to make informed decisions
- L *Hybrid meetings* are technologically seamless

Support & Service

- M Individuals can get *real-time answers* to their questions
- N Dx *monitors systems' statuses* and fixes issues before users are adversely affected
- O UVU campuses have reliable networks and cellular coverage
- P Users access standard technologies via self-service and request exceptions via a clear process

Dx Internal Improvements

- Q All IT assets are managed in a central database
- R All services have been documented and critical systems have tested business continuity plans
- S All workflows are optimized, documented, and digitized
- T Data is governed, reliable, secure, and available via self-service
- U The directory, role, and *identity management* system is accurate and updates automatically
- V Dx updates infrastructure and classroom technology in line with industry-standard life cycles
- W Products and services are designed with a "end-user-first" approach
- X Dx competencies, skills, and practices reflect industry best practices
- Y Architecture standards are documented, published, and followed
- Z Dx has a **strategic financial plan** to maintain and innovate product and service offerings

Measures Used to Tell UVU's Story									
Gathered from Executive Slides, Internal Scorecards/Dashboards, and External Reporting Requirements for USHE and IPEDS - Potential Key Performance Indicator.	Key Performance Indicators (A Measure which has a baseline and a goal).	Measure: Can be calculated, show trends, etc. but UVU does not have a specific goal for the measure.	Total Measure	s: 76	Validate	d: 33	43%		Updated 02/04/2024
Primary Measure	Collibra Entry UVU Community/Domain unless otherwise noted	Description	Data Owner	Refresh Rate	Validated	Data Producer / Department	UVU Governs Measure Raw Data 100%?	External Data o Calculation Dependency?	r TYPE
6 Year Graduation Rate (Outcome Measure) for Underrepresented Students	6 Year Graduation Rate for Underrepresented Students	6 Year Graduation Rate of Underrepresented Students (Cohort)	Michelle Kearns	Annual	Yes	BIRS / IPEDS	YES	IPEDS	MEASURE
6 Year Graduation Rate by Race/Ethnicity and International	6 Year Graduation Rate by Race/Ethnicity and International	6 Year Graduation Rate by Race/Ethnicity and International (Cohort)	Michelle Kearns	Annual	Yes	BIRS / IPEDS	YES	IPEDS	MEASURE
8 Year Graduation Rate (Outcome Measure) for Underrepresented Students	8 Year Graduation Rate for Underrepresented Students	Compare to 2012/13-2020 Cohort	Michelle Kearns	Annual	Yes	BIRS / IPEDS	YES	IPEDS	MEASURE
Awards - UVU	Total Awards	Number of Awards given to Students; USHE Academic Year	Michelle Kearns	Annual	Yes	BIRS	YES	11 200	MEASURE
		Transcriot America Street to State that, OSTE Academic Tear	Wayne Vaught	Autor		511.5			
Completions by Academic Year	Completions	Number of students receiving an award; USHE Academic Year	Michelle Kearns Wayne Vaught	Annual	Yes	BIRS	YES		MEASURE
Enrollment Rate for Underrepresented Students	Enrollment Rate for Underrepresented Students	% of UVU enrolled students who are in underrepresented / underserved population.	Michelle Kearns	Annual, Fall Semester	Yes	BIRS / Enrollment Mgmt	YES		MEASURE
Fully Online Programs	Fully Online Program Count	Number of Curriculum Programs Compared to Goal	Wayne Vaught	Annual	Yes	AA / Enrollment Memt	YES		MEASURE
Fundraising: Annual Number of Alumni Gifts	Fundraising: Annual Number of Alumni Gifts	Total number of gifts, annually	Kyle Reyes	Annual	Yes	Institutional Advancement	YES		KEY PERFORMANCE INDICATOR
Fundraising: Major Gifts	Fundraising: Major Gifts	Donation or gift of \$25K to < \$1 Million	Kyle Reyes	Annual	Yes	Institutional Advancement	YES		KEY PERFORMANCE INDICATOR
Fundraising: Principal Gifts	Fundraising: Principal Gifts	Donation or gift of \$1 Million or above	Kyle Reyes	Annual	Yes	Institutional Advancement	YES		KEY PERFORMANCE INDICATOR
Fundraising: Total Annual Gifts	Fundraising: Total Annual Gifts	Donation or gift less than \$25K	Kyle Reyes	Annual	Yes	Institutional Advancement	YES		KEY PERFORMANCE INDICATOR
Gender	Gender Ratios	% of Students Enrolled at third week census by Gender	Michelle Kearns	Annual, Fall Semester	Yes	BIRS	YES		MEASURE
General Education Average Fill Rate by Course Modality	General Education Fill Rate by Course Modality	Face to Face, Mixed, Online	Wayne Vaught	Annual, Fall Semester	Yes	BIRS, AA AVP Student Success	YES		MEASURE
Graduates	Graduate Count by Race/Ethnicity	Total number by USHE Academic Year, by Race/Ethnicity	Wayne Vaught Michelle Kearns	Annual, USHE Academic Year	Yes	BIRS	YES		MEASURE
High Impact Practices (HIPs) Completion	High Impact Practices (HIPs) Completion	Distinct Students	Wayne Vaught	Annual	Yes	AA AVP Innovation	YES		KEY PERFORMANCE INDICATOR
Number of Graduates	AKA - POTENTIAL DUPLICATE. Which term should be used? Completions or Graduates	? Number of Students who Received an Award; USHE Academic Year	Wayne Vaught	Annual	Yes	BIRS, Enrollment Mgmt	YES		MEASURE
			Michelle Kearns						
Outcome Measure Impact	Outcome Measure Impact Percentage	Number of Students impacted by a single % point increase, dependent upon 8 year Outcome Measure.	Michelle Kearns	Annual	Yes	BIRS, Enrollment Mgmt	YES		MEASURE
Race/Ethnicity		% of Students Enrolled at third week census by Race / Ethnicity	Michelle Kearns	Annual, Fall Semester	Yes	BIRS, Enrollment Mgmt	YES		MEASURE
Room Utilization Rate by Room Type	Room Utilization Rate for Classrooms Room Utilization Rate for Teaching Labs	Classrooms, Labs	Val Peterson Wayne Vaught	Annual, December 1 for previous USHE AY	Yes	BIRS, AA Class Scheduling, Facilities, SA Event Scheduling	YES	USHE	KEY PERFORMANCE INDICATOR
			Michelle Kearns						
Seat Occupancy Rate by Room Type	Seat Occupancy Rate for Classrooms Seat Occupancy Rate for Teaching Labs	Classrooms, Labs	Val Peterson Wayne Vaught	Annual, December 1 for previous USHE AY	Yes	BIRS, AA Class Scheduling, Facilities, SA Event Scheduling	YES	USHE	KEY PERFORMANCE INDICATOR
Student Belonging - UVU Community/Social		Water days to the control of the little of the control of the cont	Michelle Kearns		Yes	DIDG C	YES		MEASURE
Student Belonging - OVO Community/Social		% of Students who responded "Yes" to "I have a group, community, or social circle at UVU where I feel I belong" on the Healthy Minds Survey, Fall 2020	Michelle Kearns Christina Baum		res	BIRS Survey	153		WEASURE
Student Enrollment / Population by Race and Ethnicity		Headcount, Full-time Equivalent (FTE), Budget Related FTE	Michelle Kearns	Annual, Fall Semester	Yes	BIRS, Enrollment Memt	YES		MEASURE
Student Enrollment / Population by Residency Status		Number of Students compared to Goal, Each Semester	Michelle Kearns	Annual, Fall Semester	Yes	BIRS, Enrollment Memt	YES		MEASURE
Student Retention Rate by Race and Ethnicity, International		% of Students Retained by Term, compared to Goal; First time, Full Time Bachelor	Michelle Kearns	Annual, Fall Semester	Yes	BIRS, Enrollment Mgmt, AA AVP			MEASURE
Student Netention Nate by Nace and Edinicity, International		Degree Seeking	Wayne Vaught	Allitudi, i dii Semestei	163	Student Success	11.5		WEASONE
4 Year graduation rate (Cohort)		4 Year graduation rate (Cohort)	Michelle Kearns	Annual		BIRS / IPEDS	YES		MEASURE
6 Year Graduation Rate		6 Year Graduation Rate (First-time, Full-time, Bachelor Degree seeking Cohort)	Michelle Kearns	Annual		BIRS / IPEDS	YES		MEASURE
8 Year Graduation Rate (Outcome Measure)	8 Year Graduation Rate	8 Year Graduation Rate, First-time, Full-time, Bachelor Degree Seeking Cohort)	Michelle Kearns	Annual		BIRS / IPEDS	YES		KEY PERFORMANCE INDICATOR
8 Year Graduation Rate (Outcome Measure)		8 Year Graduation Rate by Student Demographics (Mixed Demos): - BIPOC, Race/Ethnicity	Michelle Kearns	Annual		BIRS / IPEDS	YES		MEASURE
8 Year Graduation Rate (Outcome Measure) By Award Type, Gender, and Award Year		8 Year Graduation Rate By Award Type, Gender, and Award Year (Cohort)	Michelle Kearns	Annual		BIRS / IPEDS	YES		MEASURE
8 Year Graduation Rate (Outcome Measure) Trendline and Predictions		Trendline and predictions; by cohort	Michelle Kearns	Annual		BIRS / IPEDS	YES		MEASURE
8 Year Graduation Rate (Outcome Measure) vs. Peers		by Cohort: UVU vs. Peers	Michelle Kearns	Annual		BIRS / IPEDS	YES		MEASURE
Coordinating 6-Year and 8-Year Bachelor Graduation Rates		Using same starting Cohort (First-Time, Full-Time, Fall) to show trends each year	Michelle Kearns Wayne Vaught	Annual		BIRS / Enrollment Mgmt	YES		MEASURE
Employment - Hours per Week		% of students who work 31 or more hours per week	Christina Baum / BIRS Survey	Annual		BIRS	YES		MEASURE
Employment - Status		% of students who are employed	Christina Baum / BIRS Survey	Annual		BIRS	YES		MEASURE
External Partnerships		External Partnerships data aggregated by One-time Engagements and Top Tier.	Wayne Vaught	Annual		BIRS / AA AVP Innovation	YES		MEASURE
Family Status First Generation		% of students who have children/dependents % of students who report they are first generation. Should be based on third week	Christina Baum / BIRS Survey Michelle Kearns	Annual Annual, Fall Semester		BIRS BIRS / Enrollment Mgmt	YES YES		MEASURE MEASURE
		census, Fall semester.							
Full-Time Employee Internal Hire		Percent of vacant positions filled by internal employee.	Marilyn Meyer	Annual		People & Culture (HRIS)	YES		MEASURE
Full-Time Employee Turnover Ratio		Percent of FT Employees whose employment at UVU ended in a fiscal year	Marilyn Meyer	Annual		People & Culture (HRIS)	YES		MEASURE
Graduation Outcome Measure Comparison to USHE PBF Timely Completion		6-Year Graduation Rate, 8-Year Graduation Rate, USHE Timely Completion	Michelle Kearns Wayne Vaught	Annual, USHE Academic Year		BIRS, Enrollment Mgmt	YES		MEASURE
Marital Status		% of students who are married or in a partnership	Christina Baum / BIRS Survey	Annual		BIRS	YES		MEASURE
Potential Completion Rates		by Admission Requirements Category	Michelle Kearns	Annual		BIRS, Enrollment Mgmt	YES		MEASURE
Potential Completion Rates		by Admission Requirements Category; by Gender	Michelle Kearns	Annual		BIRS, Enrollment Mgmt	YES		MEASURE
Prior Learning Credits		Credits Awarded, Distinct Students Receiving Credits	Michelle Kearns Wayne Vaught	Annual		BIRS, Enrollment Mgmt, AA AVP Student Success			MEASURE
Remediation - Math Retention Rate (overall)		Required, based on admissions? First-time, Full-time, Bachelor Degree seeking	Michelle Kearns Michelle Kearns Wayne Vaught	Annual Annual		BIRS, Enrollment Mgmt BIRS	YES YES		MEASURE KEY PERFORMANCE INDICATOR
Student Age Groups / Adult Learners		% of Students Enrolled who are 25+	Wayne Vaught Michelle Kearns	Americal		BIRS	YES		MEASURE
				Annual Fall Semester	Yes	BIRS			
Student Rating of Instruction Response Rate		Survey response rate for all UVU student rating of instruction surveys for a given semester. Surveys completed / total surveys issued = Response Rate	Wayne Vaught	raii semester	162	CAIG	YES		MEASURE
Student Time Status			Michelle Keares	Appual Fall Somester		DIDS Enrollmont Manual	VEC		MEAGIIDE
Student Time Status Top Student Barriers to completion		% and number of students attending Part Time vs. Full Time, Fall Semester Top Reasons Why Students "Stop Out" or Leave, % responses by barrier	Michelle Kearns Michelle Kearns	Annual, Fall Semester		BIRS, Enrollment Mgmt BIRS Survey, Enrollment Mgmt	YES YES		MEASURE MEASURE
UVU Alumni Residency		% of Students remaining in Utah by Service Region, Elsewhere in Utah, and % of	Christina Baum Christina Baum	Annual		BIRS Survey	YES		MEASURE
		Alumni Outside of Utah after "X" number of years. Current reported metric is 10 year	s Kyle Reyes						

Average number of minutes to first response by Service Desk agents.

Christina Baum

Annual

MEASURE

YES

Digital Transformation

UVU Service Desk First Response Time

Measures Used to Tell UVU's Story

Gathered from Executive Slides, Internal Scorecards/Dashboards, and External Reporting Requirements for USHE and IPEDS - Potential Key Performance Indicators

Primary Measure	Description	Data Owner	Secondary Owner(s)	Refresh Rate	Validated	Reported T	Data Producer / Department
4 Year Graduation Rates 6 Year Graduation Rate	4 Year graduation rate (Cohort) 6 Year Graduation Rate (First-time, Full-time, Bachelor Degree seeking Cohort)	Michelle Kearns Michelle Kearns		Annual Annual			BIRS / IPEDS BIRS / IPEDS
							.,
6 Year Graduation Rate (Outcome Measure) for Underrepresented Students	6 Year Graduation Rate of Underrepresented Students (Cohort) 6 Year Graduation Rate by Race/Ethnicity and International (Cohort)	Michelle Kearns		Annual Annual	Yes		BIRS / IPEDS BIRS / IPEDS
8 Year Graduation Rate by Race/Ethnicity and International	8 Year Graduation Rate, First-time, Full-time, Bachelor Degree Seeking Cohort)	Michelle Kearns Michelle Kearns		Annual	res		BIRS / IPEDS
8 Year Graduation Rate (Outcome Measure)	8 Year Graduation Rate by Student Demographics (Mixed Demos): - BIPOC Race/Ethnicity	Michelle Kearns		Annual			BIRS / IPEDS
8 Year Graduation Rate (Outcome Measure) By Award Type, Gender, and Award Year	8 Year Graduation Rate By Award Type, Gender, and Award Year (Cohort)	Michelle Kearns		Annual			BIRS / IPEDS
8 Year Graduation Rate (Outcome Measure) for Underrepresented Students 8 Year Graduation Rate (Outcome Measure) Trendline and Predictions	Compare to 2012/13-2020 Cohort Trendline and predictions: by cohort	Michelle Kearns Michelle Kearns		Annual Annual	Yes		BIRS / IPEDS BIRS / IPEDS
8 Year Graduation Rate (Outcome Measure) vs. Peers	by Cohort; UVU vs. Peers	Michelle Kearns		Annual			BIRS / IPEDS
Awards - by USHE Institution Awards - by USHE Institution, Year over Year Change	By USHE Degree- Granting Institution, for an Academic Year By USHE Degree- Granting Institution, # Change Year over Year	Wayne Vaught Wayne Vaught	Michelle Kearns Michelle Kearns	Annual	Yes		BIRS / USHE BIRS / USHE
Awards - by USHE Institution, Year over Year Change Awards - UVU	By USHE Degree- Granting Institution, # Change Year over Year Number of Awards given to Students; USHE Academic Year	Wayne Vaught Wayne Vaught	Michelle Kearns Michelle Kearns	Annual Annual	Yes		BIRS / USHE
Community Awareness (MarComm)	Brand Impressions; Reach	Kara Schneck					MarComm
Comparison of Awards to Cost Completions by Academic Year	By USHE Degree- Granting Institution, # Change Year over Year	Wayne Vaught	Jim Mortensen	Annual	Yes		BIRS, Finance/Budget
Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates	Number of students receiving an award; USHE Academic Year Using same starting Cohort (First-Time, Full-Time, Fall) to show trends each year	Wayne Vaught Wayne Vaught	Michelle Kearns Michelle Kearns	Annual Annual	Yes		BIRS / Enrollment Mgmt
			mercia realis				
Employment - Hours per Week	% of students who work 31 or more hours per week	Christina Baum		Annual			BIRS
Employment - Status Engagement (MarComm)	% of students who are employed Post Engagement: Mentions	Christina Baum Kara Schneck		Annual			BIRS MarComm
Enrollment Rate for Underrepresented Students	% of UVU enrolled students who are in underrepresented / underserved population.	Michelle Kearns		Annual, Fall Semester	Yes		BIRS / Enrollment Mgmt
External Partnerships							
External Martnersnips	External Partnerships data aggregated by One-time Engagements and Top Tier.	Wayne Vaught		Annual			BIRS / AA AVP Innovation
FAFSA Completion	% of enrolled students who have completed a FAFSA, excluding high school, by	Michelle Kearns		Annual, Fall Semester	Yes		Financial Aid
5.7.64	semester % of students who have children/dependents	01.000	NO. I W. W.				RIRS
Family Status First Generation	% of students who have children/dependents % of students who report they are first generation. Should be based on third week	Christina Baum Michelle Kearns	Michelle Kearns	Annual Annual, Fall Semester			BIRS / Enrollment Memt
	census, Fall semester.						,
Full-Time Employee Internal Hire Full-Time Employee Turnover Ratio	Percent of vacant positions filled by internal employee.	Marilyn Meyer		Annual			People & Culture (HRIS)
Full-Time Employee Turnover Ratio Fully Online Programs	Percent of FT Employees whose employment at UVU ended in a fiscal year Number of Curriculum Programs Compared to Goal	Marilyn Meyer Wayne Vaught		Annual Annual	Yes		People & Culture (HRIS) AA / Enrollment Mgmt
Fundraising: Annual Number of Alumni Gifts	Total number of gifts, annually	Kyle Reyes		Annual	Yes		Institutional Advancement
Fundraising: Major Gifts	Donation or gift of \$25K to < \$1 Million	Kyle Reyes Kyle Reyes		Annual	Yes		Institutional Advancement
Fundraising: Principal Gifts Fundraising: Total Annual Gifts	Donation or gift of \$1 Million or above Donation or gift less than \$25K	Kyle Reyes Kyle Reyes		Annual Annual	Yes		Institutional Advancement Institutional Advancement
Gender	% of Students Enrolled at third week census by Gender	Michelle Kearns		Annual, Fall Semester	Yes		BIRS
General Education Average Fill Rate by Course Modality	Face to Face, Mixed, Online	Wayne Vaught		Annual, Fall Semester	Yes		BIRS, AA AVP Student Success
Graduation Outcome Measure Comparison to USHE PBF Timely Completion	Total number by USHE Academic Year, by Race/Ethnicity 6-Year Graduation Rate, 8-Year Graduation Rate, USHE Timely Completion	Wayne Vaught Wayne Vaught	Michelle Kearns Michelle Kearns	Annual, USHE Academic Year Annual, USHE Academic Year	Yes		BIRS BIRS, Enrollment Memt
High Impact Practices (HIPs) Completion	Distinct Students	Wayne Vaught	merche Realis	Annual	Yes		AA AVP Innovation
Institutional Open Admissions Status	By US, public	Michelle Kearns		Annual			IPEDS, Enrollment Mgmt
Institutional Open Admissions Status Institutional Open Admissions Status	By US, public, bachelor offering, for 1st time UG By US, public, associate offering, for 1st time UG	Michelle Kearns Michelle Kearns		Annual Annual			IPEDS, Enrollment Mgmt IPEDS, Enrollment Mgmt
Marital Status	% of students who are married or in a partnership	Christina Baum		Annual			BIRS
Number of Graduates	Number of Students who Received an Award; USHE Academic Year	Wayne Vaught	Michelle Kearns	Annual	Yes		BIRS, Enrollment Mgmt
Outcome Measure Impact	Number of Students impacted by a single % point increase, dependent upon 8 year Outcome Measure	Michelle Kearns		Annual	Yes		BIRS, Enrollment Mgmt
Participation in PK-12 Programs	Number of Participants by Program	Michelle Kearns		Annual			SA AVP PreK-
		Michelle Kearns					16/Outreach/Partnerships
Pell-eligible Students Performance Funding: Access	% of enrolled students who are eligible to receive a Pell Grant. USHE System Measure: UVU Contributing	Michelle Kearns Michelle Kearns	USHE	Annual Annual			Financial Aid USHF
Performance Funding: High Yield Awards - All	Annual % Compared to Annual Goal	Wayne Vaught	OSTE CONTRACTOR OF THE CONTRAC	Annual, USHE Academic Year	Yes		BIRS / USHE
Performance Funding: High Yield Awards - Underrepresented Students	Annual % Compared to Annual Goal	Wayne Vaught		Annual, USHE Academic Year	Yes		BIRS / USHE
Performance Funding: Timely Completion Potential Completion Rates	Annual % achieved, Compared to Annual Goal	Wayne Vaught Michelle Kearns	Michelle Kearns	Annual, USHE Academic Year Annual	Yes		USHE / BIRS BIRS, Enrollment Memt
Potential Completion Rates Potential Completion Rates	by Admission Requirements Category by Admission Requirements Category; by Gender	Michelle Kearns Michelle Kearns		Annual			BIRS, Enrollment Mgmt
Prior Learning Credits	Credits Awarded, Distinct Students Receiving Credits	Wayne Vaught	Michelle Kearns	Annual			BIRS, Enrollment Mgmt, AA AVP
Race/Ethnicity	% of Students Enrolled at third week census by Race / Ethnicity	Michelle Kearns		Annual, Fall Semester	Yes		Student Success BIRS, Enrollment Mgmt
Remediation - Math	Required, based on admissions?	Michelle Kearns Michelle Kearns		Annual, Fall Semester Annual	.63		BIRS, Enrollment Mgmt BIRS, Enrollment Mgmt
Retention Rate (overall)	First-time, Full-time, Bachelor Degree seeking	Wayne Vaught	Michelle Kearns	Annual			, , , , , , , , , , , , , , , , , , , ,
Retention Rate by Cohort, vs. Peers Room Utilization Rate by Room Type	by Cohort; UVU vs. Peers Classrooms, Labs	Wayne Vaught Val Peterson	Michelle Kearns Wayne Vaught	Annual Annual, December 1 for previous	Vor		BIRS, AA Class Scheduling, Facilities,
NOOM GUILZALION RALE BY ROOM TYPE	Ciassi Cuins, EdUS	vair etei5UII	Michelle Kearns	Annual, December 1 for previous USHE AY	162		BIRS, AA Class Scheduling, Facilities, SA Event Scheduling
Seat Occupancy Rate by Room Type	Classrooms, Labs	Val Peterson	Wayne Vaught	Annual, December 1 for previous	Yes		BIRS, AA Class Scheduling, Facilities,
Sentiment (MarComm)	Sentiment Categories compared to targets	Kara Schneck	Michelle Kearns	USHE AY Annual			SA Event Scheduling MarComm
Service Area Economic Statistics - Unemployment	Sentiment Categories compared to targets By Area Compared to State	Christina Baum		Annual			BIRS
Student Age Groups / Adult Learners	% of Students Enrolled who are 25+	Michelle Kearns		Annual			BIRS
Student Belonging - UVU	% of Students who responded "Yes" to "I feel that I belong at my College/University" on the ACHA/NCHA III Survey, Spring 2023	Michelle Kearns	Christina Baum		Yes		BIRS Survey, Other Surveys
Student Belonging - UVU Community/Social	% of Students who responded "Yes" to "I have a group, community, or social circle at	Michelle Kearns	Christina Baum		Yes		BIRS Survey, Other Surveys
	UVU where I feel I belong" on the Healthy Minds Survey, Fall 2020						
Student Culture - Debt?	Statement on Student sentiment toward debt; Cannot confirm data or survey to support	Michelle Kearns					
Student Enrollment / Population by Race and Ethnicity	Headcount, Full-time Equivalent (FTE), Budget Related FTE	Michelle Kearns		Annual, Fall Semester	Yes		BIRS, Enrollment Mgmt
Student Enrollment / Population by Residency Status	Number of Students compared to Goal, Each Semester	Michelle Kearns		Annual, Fall Semester	Yes		BIRS, Enrollment Mgmt
Student Retention Rate by Race and Ethnicity, International	% of Students Retained by Term, compared to Goal; First time, Full Time Bachelor Degree Seeking	Wayne Vaught	Michelle Kearns	Annual, Fall Semester	Yes		BIRS, Enrollment Mgmt, AA AVP Student Success
Student Time Status	% and number of students attending Part Time vs. Full Time, Fall Semester	Michelle Kearns		Annual, Fall Semester			BIRS, Enrollment Mgmt
Top Student Barriers to completion	Top Reasons Why Students "Stop Out" or Leave, % responses by barrier	Michelle Kearns	Christina Baum				BIRS Survey, Enrollment Mgmt
Total Fall XXXX Enrollment Comparison to Peer Institutions UVU Alumni Residency	Total Fall XXXX Enrollment Comparison to Peer Institutions % of Students remaining in Utah by Service Region, Elsewhere in Utah, and % of Alumni	Michelle Kearns Kyle Reves	Christina Baum	Annual, Fall Semester Annual			USHE / BIRS BIRS Survey
	Outside of Utah after "X" number of years. Current reported metric is 10 years	N,C NC/C	Cin July Guill	71111001			one survey
					V		
UVU Comparative Tuition & Fee Rate UVU Service Desk First Response Time	Compare to Peers Average number of minutes to first response by Service Desk agents.	Jim Mortensen Christina Baum		Annual Annual	Yes		USHE Digital Transformation

Christina Baum	6	
Employment - Hours per Week	1	
Employment - Status	1	
Family Status	1	
Marital Status	1	
Service Area Economic Statistics - Unemployment	1	
UVU Service Desk First Response Time	1	
im Mortensen	1	
UVU Comparative Tuition & Fee Rate	1	
(ara Schneck	3	
Community Awareness (MarComm)	1	
Engagement (MarComm)	1	
Sentiment (MarComm)	1	
Cyle Reyes	5	
Fundraising: Annual Number of Alumni Gifts	1	
Fundraising: Major Gifts	1	
Fundraising: Principal Gifts	1	
Fundraising: Total Annual Gifts	1	
UVU Alumni Residency	1	
Marilyn Meyer	2	
Full-Time Employee Internal Hire	1	
Full-Time Employee Turnover Ratio	1	
Michelle Kearns	34	
4 Year Graduation Rates	1	
6 Year Graduation Rate	1	
6 Year Graduation Rate (Outcome Measure) for Underrepresented Students	1	
6 Year Graduation Rate by Race/Ethnicity and International	1	
8 Year Graduation Rate (Outcome Measure)	2	
8 Year Graduation Rate (Outcome Measure) By Award Type, Gender, and Award Year	1	
8 Year Graduation Rate (Outcome Measure) for Underrepresented Students	1	
8 Year Graduation Rate (Outcome Measure) Trendline and Predictions	1	
8 Year Graduation Rate (Outcome Measure) vs. Peers	1	
Enrollment Rate for Underrepresented Students	1	
FAFSA Completion	1	
First Generation	1	
Gender	1	
Institutional Open Admissions Status	3	
Outcome Measure Impact	1	
Participation in PK-12 Programs	1	
Pell-eligible Students	1	
Performance Funding: Access	1	
Potential Completion Rates	2	
Race/Ethnicity	1	
Remediation - Math	1	
Student Age Groups / Adult Learners	1	
Student Belonging - UVU	1	
Student Belonging - UVU Community/Social	1	
Student Culture - Debt?	1	
Student Enrollment / Population by Race and Ethnicity	1	
Student Enrollment / Population by Residency Status	1	
Student Time Status	1	
Top Student Barriers to completion	1	
Total Fall XXXX Enrollment Comparison to Peer Institutions	1	
'al Peterson	2	
Room Utilization Rate by Room Type	1	
Seat Occupancy Rate by Room Type	1	
Vayne Vaught	20	
Awards - by USHE Institution	1	
•	1	
Awards - by USHE Institution, Year over Year Change	1	
Awards - by USHE Institution, Year over Year Change Awards - UVU	-	
•	1	
Awards - UVU		
Awards - UVU Comparison of Awards to Cost	1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year	1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates	1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships	1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs	1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs General Education Average Fill Rate by Course Modality Graduates	1 1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs General Education Average Fill Rate by Course Modality Graduates Graduation Outcome Measure Comparison to USHE PBF Timely Completion	1 1 1 1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs General Education Average Fill Rate by Course Modality Graduates Graduation Outcome Measure Comparison to USHE PBF Timely Completion High Impact Practices (HIPs) Completion	1 1 1 1 1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs General Education Average Fill Rate by Course Modality Graduates Graduation Outcome Measure Comparison to USHE PBF Timely Completion High Impact Practices (HIPs) Completion Number of Graduates	1 1 1 1 1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs General Education Average Fill Rate by Course Modality Graduates Graduates Graduation Outcome Measure Comparison to USHE PBF Timely Completion High Impact Practices (HIPs) Completion Number of Graduates Performance Funding: High Yield Awards - All	1 1 1 1 1 1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs General Education Average Fill Rate by Course Modality Graduates Graduates Graduation Outcome Measure Comparison to USHE PBF Timely Completion High Impact Practices (HIPs) Completion Number of Graduates Performance Funding: High Yield Awards - All Performance Funding: High Yield Awards - Underrepresented Students	1 1 1 1 1 1 1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs General Education Average Fill Rate by Course Modality Graduates Graduation Outcome Measure Comparison to USHE PBF Timely Completion High Impact Practices (HIPs) Completion Number of Graduates Performance Funding: High Yield Awards - All Performance Funding: High Yield Awards - Underrepresented Students Performance Funding: Timely Completion	1 1 1 1 1 1 1 1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs General Education Average Fill Rate by Course Modality Graduates Graduation Outcome Measure Comparison to USHE PBF Timely Completion High Impact Practices (HIPs) Completion Number of Graduates Performance Funding: High Yield Awards - All Performance Funding: High Yield Awards - Underrepresented Students Performance Funding: Timely Completion Prior Learning Credits	1 1 1 1 1 1 1 1 1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs General Education Average Fill Rate by Course Modality Graduates Graduation Outcome Measure Comparison to USHE PBF Timely Completion High Impact Practices (HIPs) Completion Number of Graduates Performance Funding: High Yield Awards - All Performance Funding: High Yield Awards - Underrepresented Students Performance Funding: Timely Completion Prior Learning Credits Retention Rate (overall)	1 1 1 1 1 1 1 1 1 1 1 1 1	
Awards - UVU Comparison of Awards to Cost Completions by Academic Year Coordinating 6-Year and 8-Year Bachelor Graduation Rates External Partnerships Fully Online Programs General Education Average Fill Rate by Course Modality Graduates Graduation Outcome Measure Comparison to USHE PBF Timely Completion High Impact Practices (HIPs) Completion Number of Graduates Performance Funding: High Yield Awards - All Performance Funding: High Yield Awards - Underrepresented Students Performance Funding: Timely Completion Prior Learning Credits	1 1 1 1 1 1 1 1 1 1 1 1	

SUPPORTING STYLE GUIDE FOR

DATA VISUALIZATION



TABLE OF CONTENTS

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The data visualization brand guide follows the guidelines set for the university with additional design elements relevant to the display of data. Take a moment to familiarize yourself with the overall policies of the UVU brand that also apply to your department. The UVU brand voice and style guide can be reviewed at uvu.edu/marketing/branding









Purpose of a Data Visualization Style Guide

Introduction

If you are a business intelligence developer, research analyst, or anyone else who has a role or interest in telling the UVU story using data, read on. Application of the principles and design concepts in this guide will help enable better decision making at Utah Valley University, and remove data literacy barriers caused by inconsistency in design for all of UVU's stakeholders.

This style guide fits within the "umbrella" of UVU's overall marketing and communication style guide. So, using this guide should complement any document or other presentation that includes the use of data to communicate.

The application of these principles should take much less time than is spent on acquiring and analyzing a set of data. So, templates for common software programs are also provided to get you started.



Typography

The fonts shown here are recommended for use in data visualization.

STRATUM

Stratum is the Institutional Primary font for the University. This font may be used in data visualization, but should be reserved for titles and headers (not for numbers or small captions).

RAJDHANI

Rajdhani is the web-safe alternative for Stratum. You can download this font for free on fonts.google.com.

ARIAL

Use Arial for most text in data visualization. Arial may be bolded to draw attention to or emphasize important information.
Reserve italicizing text for when citing sources.

SERIF FONT

Note: in data visualization, never use a **serif font**.



Color Palette

In data visualizatoin, color has meaning. Use this guide to make sure you're correctly applying University colors to data visualization.

Primary Color Palette

All data visualization should consist of primarily the 2 colors to the right. Use Charcoal first, and add UVU Green to emphasize a neutral indicator. Use the tints below each primary hue to add contrast when needed (e.g., in a stacked bar graph or area map).

See examples on the following page.

Primary Charcoal

Charcoal | #BEBEBE | RGB: 190 190 190

Charcoal 1 - 100% #464646 RGB: 70 70 70 Charcoal 2 - 80% #686868 RGB: 107 107 107

Charcoal 3 - 60% #909090 RGB: 144 144 144 **Charcoal 4** - 20% #DADADA RGB: 218 218 218

Neutral Indicator: UVU Green

UVU Green | #275D38 | RGB: 39 93 56

Green 1 - Dark #27442B RGB: 39 68 43 **Green 2** - 80% #527D60 RGB: 82 125 96 **Green 3** - 55% #88A692 RGB: 136 166 146 **Green 4** - 25% #C9D6CD RGB: 201 214 205

Primary Value Indicators

Colors from this palette should be used intentionally — i.e., only use these colors for their specified purposes defined on the right. These colors should only be used to convey the meaning of a given indicator and not for decoration.

Note: use blue and orange when comparing two categories that have neutral values (e.g., comparing male v. female).

Value Indicators

Positive Green #008430 | RGB: 3 132 66

Use to highlight good indicators

Negative Red #E3533C | RGB: 3

Use to highlight bad indicators

At-Risk Yellow #FDB52B | RGB: 253 181 43

Use to highlight at-risk indicators

Comparison Blue

Use with orange when comparing values

Comparison Orange

Use with blue when comparing values



Secondary Data Visualization Color Palette

An additional color palette has been provided for comparing categories across different charts. For example, one application could be comparing the enrollment numbers of different demographic groups in different years. In a chart showing the numbers for 2013, the value for "married students" could be represented in yellow and the same category would also be shown in yellow on similar charts that show the numbers for the years 2017 and 2021.

Secondary Color Palette

These secondary colors should be used sparingly and are only to be used when color is necessary to compare multiple categories over multiple different charts. These colors are not to be used decoratively. Determine if the data can be communicated in only one chart before using this color palette. If the data can be displayed in only one chart, there is no need to use color to distinguish category.





Color Implementation

The following are examples of how to implement color when representing data.

If you don't need to highlight one piece of data above others: don't. If one piece of data is more important than the others, use the dark green. Use blue and orange to call out categories that are oposite one another.

Use the bright green, yellow, and red to indicate if a value is good, at risk, or bad.

Use shades of the same color (charcoal or dark green) to separate values that are represented next to each other. This could be an area chart, stacked bar graph, or donut chart.

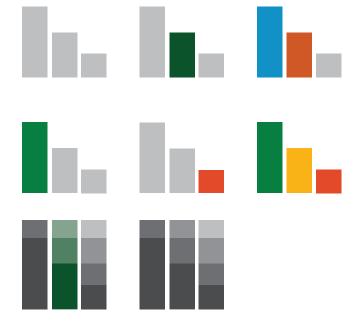




Table Styles

Model table styles after this table.

Use bold white text on UVU green for headers; left-align text with indent and center vertically in the cell; use stratum font				
For row titles: use Charcoal 1, Arial, bolded, left-aligned, indented text and center vertically	For table body, match title style but with unbolded, centered text			
Alternate row shades: Charcoal 4 and Charcoal	Separate columns with 1 pt white stroke; do not add stroke to horizontal or outside borders			



Chart Types and Uses

Line Chart

Line charts are best used to show data that changes over time. Line charts can show multiple lines (no more than 4) to highlight a comparison between 2 or more sets of data. Use no more than 2 hues and use the brightest hue to show the most important value.

Area Chart

An area chart has a similar time-series purpose as a line chart but can also show volume. Stick to 4 categories or less. Categories should be distinguished by different shades of the same color (light/dark) except for when an additional hue better highlights the most important value.

Scatter Plot

Use scatter plots to show the correlation between 2 sets of data. Scatter plots should be monochromatic (no more than one color).

Bar/Column Charts

Use bar and column charts to compare different categories or parts of a whole (stacked charts). Column charts should be used when the data have long category labels. Values should be displayed outside of the bar. Bar/column charts should be monochromatic except when highlighting an important value.

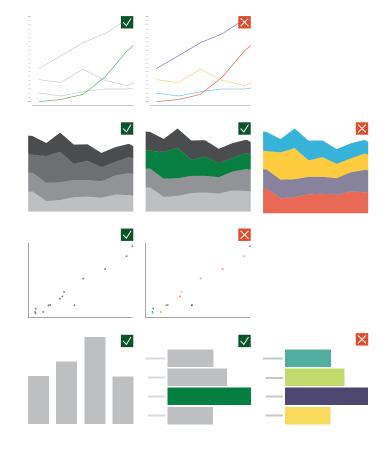




Chart Types and Uses (Cont.)

Area Map

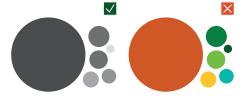
Use an area map to show categorical or continuous data based on region. Use different shades of the same hue to represent different values (darker shade = higher value)



✓

Bubble Chart

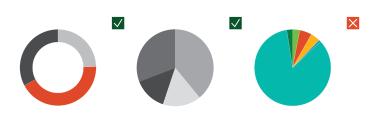
Bubble charts are good for comparing sizes of different groups. As with maps, use different shades of the same hue to represent different values (darker shade = higher value). An additional hue may be added to highlight a significant group.



Pie/Donut Charts

Pie charts and donut charts should generally be avoided and donut charts are preferable of the two. In some cases, however, these charts can be useful for showing percentages.

Do not use more than 4 categories on these charts, and only if all categories can be read easily. Use varying shades to distinguish categories, except for when an additional hue better highlights the most important value. Use a legend to label categories, rather than putting labels next to their corresponding section.



UVU

Guiding Principles

Simplicity Rules the Day

The intended audience should be able to understand the meaning of a chart or dashboard within seconds. The number of elements should be minimal — just enough to illustrate the answer to the question users came to find.

The Question is the Star

Data illustrations have a one-to-one relationship with the question they answer. Good business intelligence and data illustrations will beg more questions. That is a good thing.

Color Signals Value

Color should be used sparingly, and differences in color should compare and contrast the outcomes of a measure, not the categories.

Less is More

Text should be used only where necessary and in small doses. Take care to eliminate redundant information. If lengthy explanations are necessary, rethink the number of questions you're trying to answer with one chart or graph.

Avoid Analysis Paralysis

Filters on data categories should be minimal as well. Just enough to allow the user to shape their question. Too many filters can cause decision paralysis.

Give Credit where Credit is Due

Data source, date and time, department, and other key information is critical to understanding the context of the data you're presenting. Users will be able to make better decisions knowing this context, and they'll come to trust the data as well.



