Office of Institutional Planning and Analysis

Top -5 Accomplishments - April 2020, Year-End Evaluation

1. **Research, Analysis and Academic Program Support (Reporting Improvements & Support)**
   Faculty of Environmental & Urban Change
   - Obtained a) student/parent-based information for naming their faculty and b) physical geography stream
   - Expanded on the Faculty's initial request (i.e., faculty/program naming) by including non-requested survey sections to inform program copy content; delivered at the same cost of their initial project request

   New Market Research
   - Consultations have been effective; projects have gone forward with minimized meeting time to reduce burden on stakeholders, and needs/expectations were clearly embedded in project proposals
   - Presented the results of the ONCAT Math Competencies project at both CIRPA and the COU-MCU-HEQCO day - showcasing the work that was done

   Economic and Social Impact Report
   - Coordinated and provided data for ESIR as well as supported/administrated two surveys on a short timeline

   Research Support
   - Set up a BI platform using MS Power BI and developed/completed the 360-degree view Dashboard - Research Funding Applications - cost savings $300K+
   - Restored the database for the web-based research funding management system, Sophia - cost savings $500K+

   Early Alert (SEM)
   - Provide evidence of the utility of early alert intervention pilot program for ECON 1530
   - The first pilot project was done Fall Sept 2018, the re-designed intervention was done in Fall 2019, and was scheduled to be expanded to the current term (Winter 2020)

   Academic Program Report
   - Annual report updates and customization

   Cyclical Program Review
   - 2019 -20 data kits development and data consultation
   - Language program custom analysis and Power BI Application

2. **Data Modernization - (Development, Support & Implementation)**
   Data Modernization - with Institutional BI Adoption and Usage
   - NSSE dashboard was officially launched and adopted, and the community was trained on how to use the dashboards and interpret the results
   - CGPSS dashboard prototype created, the launch is expected in Summer 2020
   - Developed an interactive BI report that could be delivered to faculties each week to show trends - this infrastructure will be in place for the next time NSSE runs, and the reports can be easily transitioned to Power BI

   Enterprise BI Tool Selection
   - Supported the process of selecting an institutional BI tool/software (although -and until- the RFP was cancelled, we still consulted with various University stakeholders, met with UIT/EDW, went to Power BI demos, provided data from the Internal Repository Survey to inform decision-making, strategized about the RFP process and who to include in the process, etc.)

   Service Transformation
   - Shared staff resources to support Benchmarking and Service Transformation project

3. **Reputation and Impact Rankings - (Ranking Improvements)**
   THE Impact Ranking 2020
   - OIPA played a key role in coordinating all the data for this ranking and has submitted on behalf of the University
   - In the 2019-2020 fiscal year York University has earned recognition from Times Higher Education (THE) on its impact ranking, York University ranked 33rd in the world!
   - The overall ranking includes 766 universities from 85 nations/regions. THE's Impact Rankings assess the social and economic impact of universities using metrics based on the United Nations' Sustainable Development Goals

   TheBestSchools.org
   - York University ranking as 100 in the top 100 Universities in the world
     "This ranking of the world's best universities focuses on academic prestige and intellectual horsepower! At these universities, you will be with the brightest faculty and students in the world develop your knowledge and skills to join the world's elite academics, scientists, and thinkers"

NSSE
- NSSE 2020 Administration (even though it has been derailed somewhat by COVID-19) Mobilized the faculties to support the survey and provide them with ongoing data to support their efforts

4. **SMA3 2020-2025 - (Coordinated Submission)**

Strategic Positioning & Scenario Modelling
- Supported the SMA3 committee working groups, combined all input and expertise from the SMEs and consolidated the information for the Provost; Supported community information sessions through various methods of data collection, verification and analysis
- Developed the corridor modelling, including enrolment projections through to 2020-2025; Positioning for metric weighting, provided recommendations and led bilateral discussions; Lead the scenario modelling and recommendations for York's economic impact indicator
- Coordinated the draft narrative and the SMA3 submission with Provost and President's Office, completed data workbook and facilitated the submission of SMA3 Instrument and Data Workbook to MCU on **February 18, 2020**
- Responded to Ministry feedback on March 10th and again on March 16th and resubmitted changes to the final draft of the Narrative and Data Workbook
- Ministry deferral on finalizing SMA3 due to COVID-19 crisis
- Internal SMA3 Dashboard (draft) currently in development

5. **Enrolment Modeling & Reporting - (Improved Processes)**

Graduate & Undergraduate
- Construction of the new graduate enrolment model that improved over the previous graduate model by incorporating detailed student level analytics. It is an easy to maintain model with lower turn-around time and less risk of error when adding new data. Using historical data to track the movement of students, it allows us to forecast Heads, FFTEs and WGUs at the program cluster level
- UG enrolment projection in Heads, FFTEs and WGUs for Contract 2019/20
- Enrolment and resource planning for Markham Campus

Reporting
- Ensure the accuracy of enrolment data
- Support government and sector reporting requirements related to Enrolment

SHARP Support
- Tuition revenue projection for Budget Envelope 2019/20, including Early Indicator; transitioned from BIU to WGU allocations/attributions

Process Optimization
- Migration of OIPA enrolment files and processes to a virtualized Linux server

6. **Labour Relations Support**
- Development and consultation of scenarios for YUFA Equal Pay
- Osgoode Anomaly model development, retro-exercise 2016/17, 2017/18, and 2018/19

7. **Integrated Resource Plans (IRP)**
- Continued to support PVP IR Plan development, realigned 2018-2020 PVP IR Plan to retreat themes including Top 10 critical priorities and overarching outcomes
- In response to the COVID-19 situation, implemented changes to the annual IR Plan evaluation process, both at an organizational and Divisional/Faculty/unit level
- Provided alternate reporting options and support to the planning community (e.g. Top 5 Accomplishments vs annual evaluation)
- Continued IR Planning support - provided options for alternate evaluation formats (Excel, Word, Email) for Divisions/Faculties and units as well as ongoing IRP technical training for InfoPath
- Working towards meeting the board reporting timeline for the President – keeping to the reporting cycle

8. **COVID19 Planning and Response Support**
- Developed enrolment and revenue (tuition and grant) impact scenarios at University and Faculty levels, developed and presented to Board and Senior Executive and COVID planning groups
- Administered York new and continuing Summer survey and reporting; Coordinated prospective international student survey with Academica, and developed report for PVP/Deans and COVID planning groups; Coordinating HESA/Strategic Counsel survey of current and prospective students
- Leading costing of LR proposals
- Supported draft institutional budget framework for COVID scenario responses with Finance and Provost Office.

Academic Quality
1. Innovative, Quality Programs for Academic Excellence

Provide support for development of UAP 2020-2025

Strategy/Action	Measure/Milestone		
Coordinate environmental scan information for Provost/APPRC/Faculties to inform UAP development Provide data on progress towards previous plans (e.g. White Paper, UAP) Produce reports as needed throughout process Align IR framework & Planning Cycle to align new UAP timeframe	Information is developed and presented Performance report (Measuring Success)provides progress towards plans	🟢	On Track
Continue to systematize program data and make efficiencies on how CPR data is pulled and presented to the community	Undergraduate and Graduate Program Reports for data kits are generated and delivered to the program chair and directors for inclusion in the CPR process; (Data and key metrics are compiled and published for admission, enrolment, retention and graduation at program level in a consistent and efficient layout) Improvements are made to the end-to-end workflow of Academic Program Report generation Annually, OIPA's data hub provides Academic Program Reports for each undergraduate and graduate program, certificate and diploma Improvements are made to the data quality, and student and enrolment databases are maintained with integrity Faculties/units have program information to inform decision-making and resource allocations	🟢	On Track
Support ARMS course planning, teaching resource allocation, and budget planning for Faculties and continue to improve the system's performance and functionality	Osgoode's academic resourcing fully integrated into ARMS All Faculties on ARMS The process for assigning, using, and eventually converting temporary employee pay no's is streamlined Quicker access by contract faculty to teaching resources like Moodle Instituted a KANBAN agile project management tool to increase development flow items through the queue to promote collaboration and prioritization of work Improved ARMS for tracking graduate student support and associated academic resourcing	🟢	On Track

1. Develop sustainable enrolment model scenarios.
2. Model Tuition and grant revenue associated with enrolment scenarios.
3. Develop comparative staff, student and faculty ratios for consideration

Enrolment scenarios developed and presented to Provost and Dean, and Deans Forum
Tuition and grant revenue assumptions developed for all scenarios
Ratio information informs decision making.
Program development is informed by sustainable enrolment and resource scenarios

On Track

Academic Quality
2. Advancing Exploration, Innovation and Achievement in Scholarship, Research and related Creative

Support grant applications, bibliometric rankings and research reporting capacity

Strategy/Action	**Measure/Milestone**		

| Build the capacity to report on research and funding data with much better integrated research reporting | Improved quality and accuracy of Sophia database data
Dashboards provide insight, understanding and analysis of Sophia data
Integrated E-CV and databases improves bibliometric analysis
Enhanced systems and infrastructure improves analytics, measure reporting, comparisons and rankings | | On Track |

Student Success
3. Enhanced Quality in Teaching and Student Learning

Support Faculties with program evaluation to enhance academic experience and student success

Strategy/Action	**Measure/Milestone**

Develop insight on the educational pathways of students and the efficacy of specific programs to improve student performance and retention.	Partnered with the Toronto District School Board to track students from K-12 to York University and successfully matched a large portion of students (providing information about pathways from TDSB into York; and demographic information about students) ONCAT Funded: Tracked the pathways of business students that transfer between York and Seneca to better understand the transfer student profile and factors influencing successful transfer Gathered an understanding of the mathematical competencies of students who transfer from a college to those who enter directly from high school and provided data analysis for the research project ONCAT Funded: Student experience in transfer project with Seneca in development	🟢	On Track
Support Student Services to enhance student support services to help the unit evaluate the impact of initiatives using student perspectives.	Support the stakeholders involved in planning and managing student services (e.g. survey design, conducting analysis)	🟢	On Track
Support Faculties and academic departments using customized research projects to inform their program development and monitoring.	Consulted with academic stakeholders to identify research questions and potential research approaches Leverage and collaborate with external market research resources Stakeholders are provided with analysis and summary to inform next steps in program development and monitoring	🟢	On Track
Operationalize market research options at the University (e.g. identify data resources and tools)	Toolkit developed to summarize market research options Developed expertise in new research methods Market research resource library available for reference	🟢	On Track

Conduct predictive analytics to provide intelligence to support program and resource decisions to improve student retention/persistence and success

Strategy/Action	Measure/Milestone		
Leveraging student behavior in York's Learning Management System (Moodle), student demographic data in SIS , and Student Self-Assessment data to identify crucial relationships, opportunities and risks for students.	Developed analytic datasets which merge student demographics, student self-assessments, and Moodle student activity data Leverage analytic datasets to identify factors which predict student retention Student retention factors identified Leverage student retention data to improve retention System capacities enhanced with integration of predictive data elements (eg. York specific Moodle metrics, student self-assessments) into the Civitas Advising tool for accurate 'early alerts' for at-risk students Continually increasing the University's accuracy of identifying student success and risk trends and patterns; pilots are being conducted and pilot recommendations are being used to inform decisions to improve student retention and success Enhanced data analytics with machine learning for improved evidence-based decision making with collaborators (OIPA and within the University)	🟡	Progressing
Develop a survey ETL process and automated statistical analysis for survey data and develop accessible dashboards.	Creation of Dashboards (e.g. CGPSS) Dashboards are presented to internal stakeholders and brown-bag sessions are conducted Dashboards go live on Yulink Data informs local and central strategies (e.g. Textual Analysis - NSSE 2019) Dashboards provide improved awareness, access and insight into survey data for the institutional and Faculties Completed proof of concept project for an Enterprise BI Tool Ongoing maintenance of published dashboards	🟢	On Track

Administer a variety of surveys with a high enough response rate for data analysis	Campus-wide campaigns are underway (e.g. NSSE, CGPSS, STUDENTMOVETO) Administered incentives for increased response rates Survey design and administration advice provided across campus Survey response rates have improved	🟢 On Track
Develop a proposal for institutional survey coordination with community partners	Drafted 'university survey' governance and coordination proposal. (metric: proposal released for consideration) Awareness of issues being addressed and support for final governance and coordination plan Established survey committee Survey governance coordination, and policy and procedures implemented	🟢 On Track
Support Economic & Social Impact Report Development	Provided background data to consultants Administered surveys to students Reviewed report findings	🟢 On Track
Manage, analyze and report on the Student-Self Assessment data in collaboration with interested units across the University to meet the needs of those units	Project plans developed with various Faculties and VP Academic about specific projects Multi-year data repository of student self-assessment data compiled and made accessible (as appropriate) Overseeing the integration of student self-assessment data into the Civitas system to facilitate identification of at-risk students based on non-cognitive measures	🟡 Progressing
Understand how rankings are scored and identify where York could affect ranking improvements: MacLean's QS THE NSSE CGPSS	York Library and VPRI continue to cleanup Yok related data in citation indices Faculty members include ORCID in CVs so that research publications and impact are captured York has completed negotiations with THE and QS; York has a growing desire to purchase datasets in BI format	🟢 On Track

Support labour relations and Collective Bargaining processes

Strategy/Action	Measure/Milestone		
Develop interactive academic staff data repository	Create historically accurate reports for all academic employee groups Dashboard results provide access to historical data OIPA is working with Labour Relations and HRIM	🟢	On Track
Continuously improve CUPE 3903 hiring process	Systematized posting and hiring dates Monitored hiring process across all units, identify issues that cause delays Provided progress reports and highlighted areas for improvement	🟡	Progressing
Enhance data gathering, analytics and systems development to facilitate the needs for FT & PT Academic Collective Bargaining (YUFA, OHFA and CUPE)	A parameter-based interface is developed to gather pension and benefit credit service data for annual processing Data needs for bargaining units are supported through reusable, and repeatable automated programs (systems) Continuous improvement of source data quality and accuracy is ongoing Data provided in timely manner to support negotiations effectively	🟢	On Track

Develop effective processes to support government and sector reporting requirements related to CSRDE, CUDO, SMA and Enrolment.	CSRDE: Cohort-specific retention and graduation rates calculated and submitted to the Consortium for Student Retention Data Exchange (CSRDE) Data is now available at the Faculty level for York CUDO: Developed and verified Common University Data (CUDO) Data has been published to York's CUDO website SMA: Dashboards dynamically track institutional and Faculty results against targets + enrolment contracts Dashboards are used at the Institutional and Faculty-level to track progress of SMA goals and objectives Dashboards provide Institutional and Faculty-level metrics and targets and inform IR Plan strategies and measures Annual report-back to the Ministry is completed Enrolment: Data validations are completed Diagnostics developed to ensure accurate data ERE data for MTCU completed	🟢	On Track
Develop datasets to support reporting systems for units across the university to enable decision-making and resource allocations	Diagnostics on data completed Student Information Data, Financial and HR data available is made available (e.g. PES, SIS, STAC, INFOMART, HR) Faculties and OIPA have access to reportable data	🟢	On Track
Create an Internal Repository of Dashboards for our internal stakeholders that will allow more access to readily-available, insightful data	The University acquires an institutional BI platform OR decision on a work-around plan to publish the internal repository Pilots are completed (e.g. Enrolment, Admission) in the new dashboard format Internal use dashboards are published and the community has the ability to perform analyses and create custom reports	🟢	On Track
Provide ongoing maintenance & updates to Quick-Facts dashboards	Quick-Facts dashboards have little to no data anomalies Quick-Facts dashboards are updated and updates are communicated to users No major issues with the Quick-Facts updating process (back-end) Quick-Facts continues to track ~10-15k clicks/year	🟢	On Track

Further develop existing enrolment models to support data-driven enrolment planning and provide better access to the modelling data	Strategic advice on SMA3 corridor planning provided Integrated SMA3 corridor with Faculty contracts Integrated enrolment forecasts used in contract, budget, recruitment to support more accurate projections of revenue and sub-Faculty intake targets Created new graduate student enrolment projection model that better captures movement of students through their graduate programs and allows more accurate tuition and grant revenue projections Refined undergraduate enrolment model and intake targets so that projections are made at sub-Faculty levels (e.g. program clusters) that make sense from both recruitment and revenue projection perspectives Created a database of previous and current projections, targets and actuals together with a front-end, dashboard-style interface to promote easier access to strategic enrolment planning data Integrated the undergraduate and graduate models into the interface so that what-if scenarios may be run by end users	🟢	On Track
Use the undergraduate and graduate enrolment projection model to report and predict enrolment contract targets annually	Provided weekly enrolment data to VPA&P, Faculties and Finance (e.g. FFTEs, Headcounts) Multi-year enrolment plans discussed with Faculties FFTE projections completed for the next three years based on Faculty intake plans Enrolment target contracts distributed to the Faculties	🟢	On Track
Develop a new medium and long-range Faculty complement model to support data-driven academic resource planning	Full-Time Faculty Plan OIPA has identified opportunities to make better use of the FTF data and will eventually provide data to various stakeholders (e.g. will feed into the Faculty Complement model) Faculty Complement Model Coordinate and collect Faculty complement data to support Provost faculty complement planning. Developed a medium- and long-range faculty complement model in consultation with Provost and informed by Faculty Complement discussion paper, consultation process and strategic planning Streamlined and enhanced the collection, integration and presentation of faculty complement data for planning purposes	🟡	Progressing

Collaboratively improve the existing anomaly and pay equity exercises for full-time faculty	Annual anomaly regression analysis conducted, and anomaly reports generated for all Faculties Analyses results interpreted and communicated to Faculty Relations Anomaly exercise procedure documented, and validation lists and report distributed A fair and equitable compensation system is in place that supports the success of the organization New YUFA pay equity anomalies model created in collaboration with YUFA executive and Academic Relations.	🟢	On Track
Provide advice on metric target, bands of tolerance and weighting strategies and enrolment corridor strategy	Develop corridor scenarios to maximize enrolment income and manage risk for 2020/21 to 2024/25 time period. SMA3 sub-group consultations: gathering insights on approaches and metric data trends Develop scenarios with historical data and project future performance and risk SMA lead for York. Member of SMA3 negotiation panel with MTCU Coordinate SMA3 metric narrative and strategy with President's Office	🟢	On Track
Support the alignment of planning across the University with the long term strategic direction set out in the White Paper, UAP, SMA and PVP IR Plan	An integrated planning communication strategy is ongoing Ongoing communication with the university community on IRP priorities, activities, and accomplishments IRP 2019-2020 template is aligned to York's Pillars, Mission, Vision, UAP Priorities and PVP IR Plan WP, UAP , SMA and PVP IR Plan strategies and metrics are embedded IR Plans and outcomes are clearly articulated Learning, development and IRP support provided to the planner community The University's budget and planning processes are closely coordinated with and explicitly linked to its academic and strategic plans and priorities Assessment and metrics are used to evaluate progress to towards academic and strategic priorities (mid-term & final) IRP Dashboards track Divisional & unit IR Plan information and allow the ability to create quick summaries ; dashboards significantly cut-down on the time it takes to create IRP reports and analyses OIPA has partnered with HR to bring together planning (IRP) and employee performance processes (PDP) in a more integrated way for 2019 forward IRP 2020-2025 will be aligned to new UAP priorities and will include SMA3 metrics	🟢	On Track

Develop enrolment planning reporting and analytics to help inform decision making and space planning for the new Markham campus	Revenue projection model scenarios created to support Markham proposal Undergraduate and Graduate Enrolment projections developed in consultation with Faculties Draft Enrolment Complement Plan completed Markham Enrolment model integrated with institutional, SEM and SMA plans Engagement with Faculties on programs and curriculum planning at new campus in conjunction with AVP Academic	🟢	On Track
Update & redesign the "Measuring Success – Progress Towards Plan" (Institutional Metrics Report)	Functional leads across the University have identified key metrics to include in the institutional metrics report A new dashboard has been developed that incorporates new measures and targets set out in the UAP 2020-2025 The institutional metrics report incorporates key metrics to track the University's success against the new UAP 2020-2025 The report is used by Divisions/Faculties and units to evaluate progress against strategic and academic strategies	🟡	Progressing
Streamline the KRI reporting exercise to the Board by developing a data repository process; and providing accurate and consistent metric information	Developed and informed best way to track/record KRIs Bi-Annual data reports are provided to Internal Audit York's key risk values are presented to BOG The University is able to mitigate risk and initiate strategies to improve its KRI status	🟢	On Track
Streamline OIPA's employee onboarding processes	Onboarding and orientation checklist has been documented; includes pre-arrival and arrival procedures for new employees, including systems access and technical setup Standard Operating Procedures (SOP) indicate process roles and responsibilities	🟢	On Track
Maintain and update critical pages on the OIPA website; keep the content up to date and relevant	Website's web analytics is examined to determine performance and usability Content is organized to best practices Majority of data is accessible to the YORK community through OIPA website Data Hub is up-to-date and is used as the University's central data repository	🟢	On Track

Select new project portfolio system to ensure that critical deadlines and information needs of the community are met	Quarterly reports are generated AVP and Provost are informed of workload and resource capacity Improved reporting is achieved by leveraging the project portfolio functionality that align resources/projects to the UAP priorities New project reporting process and tracking methodology improves decision making and provides efficiencies for the unit	🟢	On Track
Improve the quality, access and understanding of benchmarking data	Reports inform Senior-Level decision-making Cost/wFTEs/Service Effectiveness results and reports are presented to various divisions and units Benchmarking data reviewed to ensure data integrity Units/Depts start using this data in decision-making OIPA on Benchmarking Steering Committee	🟡	Progressing
Develop the systems, data, and reporting capabilities for the Institution and Faculties that support SHARP, and improve access and insight into SHARP data	SHARP Data Tuition and Grant projection models are improved and tested Cost allocation data available for SHARP based on approved driver methodologies, data is used to develop SHARP budget envelopes Inter-Faculty data supports the allocation of resources between Faculties for teaching services provided to students Teaching space data has been moved to the Cloud and a new process to acquire teaching space data from the cloud environment has been developed Provide in-year tuition and grant projections for Faculties Budget envelopes distributed to the faculties for budget guidance using the current tuition framework SHARP Dashboards SHARP Dashboard prototypes are created SHARP Dashboards track revenues and costs (breakdowns) across years at the Faculty and Institutional level SHARP Dashboard numbers are verified against budget envelopes SHARP Dashboard is live on Yulink Decreased number of manual processes and length of time it takes for Faculties to do an analysis of their SHARP data SHARP Website SHARP's public-facing website is live	🟢	On Track

Support Review of SHARP	OIPA member on SHARP steering committee Engage in consultations with external reviewers Gather feedback from budget consultations Support implementation of SHARP review recommendations Develop plan to adjust revenue drivers coming from review	🟢	On Track
Provide information, analysis and advice to Provost, President and other PVP members	Reports for Board Finance and Audit, Academic Resources, Senate, APPRC, EPG completed as requested by the Provost, VPFA and President Data is provided for President's Annual Report Data is presented into useful information that provides context, supports planning practices and decision-making for leadership	🟢	On Track
Professional training, development and recognition of staff	Employees feel appreciated for their contributions. Improved relationships between coworkers Employees strive to meet and/or exceed performance expectations Employees show a heighten level of commitment and interest to the institution Employees benefit by developing new skills and the university benefits from the additional expertise acquired	🟢	On Track
Acknowledge employee contributions and their role in moving forward York's academic and administrative priorities; Align Roadmap portfolio tracking with Institutional priorities.	Employee contributions are recognized Reward and recognition occurs as close to the activity as possible to reinforce positive action and behavior Employees understand how their work aligns to University priorities Employees provide input/develop strategies for OIPA's IR Plan	🟢	On Track