Service | A description of the service, including standard and optional features associated with the service | A description of what the service does not include | Any supporting or underpinning services | A description of the target audience of the service; who is eligible to request/view/use the service | Timeframes for fulfilling the service | Costs (if any), including a description of whether this service is centrally funded or cost recovery or some other funding model | Hours of service availability | Hours and methods of receiving support, how to escalate a service issue and key contacts for the service | Service user responsibilities | Instructions on how to request the service and an explanation of how its delivery is fulfilled | Identification of a "Service Owner" who is the
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University-Level Survey Coordination | University-Level Survey Coordination - IRO services, including process for sending invitations and reminders, obtaining appropriate population info, obtaining requested information about the campus for the survey | Development or validation of survey instruments; administration of surveys for faculty projects or capstones | Institutional Effectiveness Committee (IEC) approval | Faculty and Administrators | Highly dependent upon the criteria of the survey | Dependent upon the survey; unless this is budgeted by IR in the prior year, costs for the survey administration, new data and resulting reports, incentives and marketing will be paid by the requestor. | Normal business hours | Exclusion is highly dependent upon approvals from IEC/IRB and calendaring requirements, as well as timelines dictated by survey vendors. | Initial contact should be made with IEC for approval and scheduling; obtain necessary IRB approvals; provide initial background materials about the surveys which may include budgeting processes. | First, contact the Associate Provost for Assessment and/or Chair of the IEC (currently Dr. Glenn James) for approval and calendaring; Contact Graduate Studies and Research (Rebecca O'Connor) for IRB approvals. After IRB/IRB approvals, contact Institutional Research. A member of the IR staff will follow-up with requestor and IEC to assist with further needs and details. | Robin Logan, Director

Analysis of University-Level Surveys | University-Level Survey DASH analysis for delivery through DASH (Tableau Server). When possible, this may include the ability to filter the report for more-in-depth review. | Analysis for surveys which are not on the IEC assessment calendar; IR will not purchase raw data from vendors, unless already under IR budget allocations | Institutional Effectiveness guidelines as related to assessment benchmarking | Faculty and Administrators | Dependent upon receipt of survey results and existing report processes for prior iterations | At the time of purchasing survey administration from the vendor, the raw data should be purchased by the survey requestor. | Normal business hours | Delivery of analysis is highly dependent upon receipt of raw data from vendor. Timelines are established at that time. | Outline any specifically desired groupings or filters for the resulting data report; identify any additional information which needs to be retrieved from raw data (i.e., student program if not self-reported, or questions from another survey); provide guidance for benchmarking if needed; identify delivery methods outside of DASH (Tables) if needed. | This will be established at the time of survey administration. The delivery of the report will be primarily through DASH (Tableau), with additional access to raw data given to IEC through Dr. Glenn James. | Robin Logan, Director

5-Year Program Review Reporting | 5-Year Program Review information from DASH. This includes IPEDS Peer data, enrollment trends, retention and graduation rates, degrees conferred, course information and available university level survey results. Does not include student learning outcomes (SLOs); IR does not complete the 5-year program review document | Coordination with Institutional Effectiveness Committee (IEC) and program assessment committees for the completion of 5-year program review documentation; DASH training for appointed person from the program; DASH days to assist with finding and utilizing DASH reports | Faculty, Program Directors, Deans and Provost | The 5-year program review is generally due in the Spring of each term. DASH DAYS sessions are offered each Friday from February through May. The 5-year program cycle is determined by, and communicated through IEC and Dr. Glenn James. None | Normal business hours | DASH DAYS 1 - 5: 1-2 pm each Friday in February - May. Other requests and questions may be handled outside of DASH DAYS and are dependent upon staff availability. | Request and complete 45-minute DASH training; discuss requirements of 5-year program review with Dr. Glenn James, Dean and/or program chair; submit final 5-year program review to Dean and/or IEC. | Initial DASH training is scheduled with Robin Logan; for those persons with a DASH account, no appointments are necessary on DASH DAYS. | Robin Logan, Director

Main Campus Faculty (Course) Evaluations | Main Campus Faculty (Course) Evaluations which are administered through ConnectEDU/CoursEval software. This includes the initial selection of courses to be evaluated in full or mini terms for the main campus. Access to the CoursEval system is granted to Faculty for their own courses, Deans for their college or school courses, and Provost for the university. | Specific reports for tenure process from old systems prior to Spring 2006; connection directly to CoursEval raw data | A list of courses within a term, which includes all affiliated faculty, setup of additional access for associate deans and department chairs, as approved by Deans. | Faculty, Program Directors, Deans and Provost | Courses are identified by the 5th week of the Fall or Spring semesters. Courses and students are loaded into CoursEval by week 6. Evaluations are administered weeks 7-8 for Minis and weeks 14-15 for Fall and Minis courses. Results are available 3 week after grades are due for the term. CoursEval for summer courses are available upon approval of Provost and prior to the start of the summer term in May. | Normal business hours | Contact Roland Carrillo during normal business hours by phone or email for support questions. If the question requires support from ConnectEDU, timeframe is subject to normal business hours for Eastern time zone. | Selection of courses to be evaluated should be completed at the beginning of each term by Deans and Provost; Deans must request additional access for associate deans by week 6 of the Fall or Spring term. | This is scheduled on a standard recurring calendar for Fall and Spring terms. | Roland Carrillo, Assistant Director

CoursEval assistance | CoursEval assistance for other UH/Courser managers | Administration of a course evaluation system | Review of ARGOS reports written for uploading new information into the CoursEval portal; review CoursEval system settings; communications about system updates | As needed | CoursEval license for UH is currently budgeted through IR | Normal business hours | Contact Roland Carrillo during normal business hours by phone or email for support questions. If the question requires support from ConnectEDU, timeframe is subject to normal business hours for Eastern time zone. | Identify issues within the specific setp; review and prepare course notes list; student list, faculty list and survey instruments; prepare and distribute resulting reports, including access to Deans and Provost | Email or telephone Roland Carrillo | Roland Carrillo, Assistant Director

DASH Training | DASH Training to access reports in DASH (Tableau Server). Banner or ARGIS training | AD account | Faculty and Administrators who need access to course reports, peer review information or survey results | 5 - 60 minute time allotment for training session | Cost of Tableau Server is budgeted with IR (currently $150 per named user and limited to 125 total licenses) | Normal business hours | Contact Robin Logan or Roland Carrillo during normal business hours by phone or email for support questions. Maintaining accuracy and proper use of the information according to FERPA/WHIPA/CARRS regulations | Email or telephone Robin Logan or Roland Carrillo | An appointment for an in-person training will be scheduled. | Robin Logan, Director
### DASH Report Development

**Banner Financial Report, DASH** (Tableau Server): This includes additional functionality within the reports to allow for in-depth review of the information.

| Financial Reports, Alumni Reports, extensive capstone projects, extensive data requests for dissertations/theses, Historical data sets, Banner information, other collected information (EduSoft, Legitbits, CourseEval, etc.) | Faculty and Administrators referencing primarily student and course information | Dependent upon complexity of report requested and underlying scripts | none | Normal business hours | Normal business hours via phone/email | Provide explanation of type and scope of information needed in the report. | Provide desired timelines. | Requests can be made through direct email to Robin Logan or Roland Carrillo. Timing of report completion is dependent upon other mandatory processes currently on the IR calendar (ex. Census). A minimum of 2 week lead time is requested. The report will be posted to DASH, and an introduction will be provided in person and/or by email. | Robin Logan, Director of Internal Audit | Roland Carrillo, Assistant Director of Internal Audit |

### Interactive Factbook

**Publicly available Interactive Factbook (Tableau Public)**, access to underlying unit-level data. 

| Censuses Process and certification of degrees confirmed | General public | Enrollment - after census; degrees conferred October 1 with the completion of the CBM 093 | none | Continuously available on the website | Normal business hours via phone/email | none | n/a | Erika Pompea, IR Program Coordinator |

### Federal, State and Other Mandate Reporting

**Completions or support of federal, state, and other agency reports: IPEDS, CBM 093, CBM009, ICUT, NCAA, etc.**

| SAB reports designated for other offices (ex. NCAA, IPEDS, Finance) | Work with UWM Financial Aid for CBM009 enrollment and The&C FADS report reconciliation | U.S. Department of Education, Texas Higher Education Coordinating Board, National Collegiate Athletic Association, Independent Colleges & Universities of Texas | Depends on the specific report: IPEDS-Oct., Fall, April; CBM-October/March; ICUT-Sept., Dec., March, NCAA-Oct., May | none | Normal business hours | Normal business hours via phone/email | Contact IR with significant data issues, if any; publish data as provided | Provide a copy of the letter/email from a designated agency official announcing upcoming report and completion process. | Robin Logan, Director or Roland Carrillo, Assistant Director | Roland Logan, Director |

### DASH Days

**DASH Days**

| On the spot report development | AD account | Faculty and Administrators n/a | Tableau costs are budgeted by IR | No appointment necessary from 9 a.m. - 1 p.m. and 3 p.m. - 5 p.m. | Normal business hours via phone/email | Previously complete DASH training on DASH training, maintain security and proper use of information according to FERPA/NFPA regulations | No appointment necessary. Come to the IR office on Fridays from 9 a.m. - 1 p.m. and 3 p.m. - 5 p.m. One of the IR staff members will answer questions and provide assistance with DASH. | Provide a copy of the letter/email from a designated agency official announcing upcoming report and completion process. | Robin Logan, Director or Roland Carrillo, Assistant Director | Roland Logan, Director |

### External Agency Request Requests

**Support reporting to external agencies (ex. accreditation, grants, etc.)**

| Submitting reports designated for other offices | Identify cohorts and/or populations, as well as review data pre-report development | Principal Investigators and designated university support personnel | Depends on the specific reporting schedule provided by the agency | none | Normal business hours | Normal business hours via phone/email | Contact IR with significant data issues, if any; publish data as provided | Provide a copy of the letter/email from a designated agency official announcing upcoming report and completion process. | Robin Logan, Director or Roland Carrillo, Assistant Director | Erika Pompea, IR Program Coordinator/Analyst |

### Common Data Sets

**Common Data Set (CDS) - a nationally accepted pre-defined set of commonly asked questions from which derives from available data sets.**

| Completion of data elements needed from UW Financial Aid or Human Resources | Foot CDS to UW IR website; Completion of Financial Aid, Human Resources, and Comptroller sections by the appropriate area | University of Wisconsin News, Petersons, ACT, Wistelgreen, Orchard House, and the general community | Available in October, and fully completed in early Spring with HR IPEDS data | none | Continuously available on the website | Normal business hours via phone/email | Contact IR with significant data issues, if any; publish data as provided | Worksheet available each October for download via website | Robin Logan, Director or Roland Carrillo, Assistant Director |

### Census (Historical Reporting)

**Census Reports [DASH] - the interactive longitudinal reports based upon historical snapshots for each term.**

| Broad access to underlying unit-level data | Identifying cohorts for ITTC (Fall), BSN Nursing, Honors, some PR Direct Admit-PR cohorts to be added | UW President, Provost, VPs, Deans, Admin Directors | UW class day for data capture, day or two following to check data and census test group to review reports; after the reports are reviewed, the reports are available on DASH & IR web | none | Normal business hours | Contact Roland Logan or Roland Carrillo; questions; data issues are resolved with data owners, report issues are resolved with ITTC Infrastructure (server) and/or Tableau Software | DASH training; subscribe to reports and cleanse Banner data, as appropriate; verify other areas of data as appropriate | New DASH users contact Roland Logan or Roland Carrillo for 45-minute in-person training; existing active users have access to the census reports | Robin Logan, Director or Roland Carrillo, Assistant Director | Roland Logan, Director or Roland Carrillo, Assistant Director |