

# **Administrative Data Profile Guide**

## **2021-2022**

## INTRODUCTION

Each administrative unit undergoing Program Review is responsible for preparing a profile of operational data and key performance indicators. Key performance indicators are measurable values that help a unit track performance towards meeting strategic or operational goals. The Data Profile is the unit's opportunity to present concise, aggregate data on the unit's performance. The unit should aim to use the Program Review process to develop (or refine) a set of key performance indicators to regularly measure its progress in achieving its goals. By the end of this program review cycle, each administrative unit at the University will have developed and/or refined their key performance indicators to use routinely going forward, encouraging continuous improvement and data-driven decision making across the University.

Units typically begin working on the Data Profile by assessing what data is currently available and in what format (e.g., excel, databases, etc.). The majority or entirety of data will be housed at the unit-level; if requested, the Program Review Office can help coordinate data that may be available centrally (e.g., sponsored research proposals and awards). The Program Review Office will schedule at least one meeting to review the initial draft Data Profile prepared by the unit, discuss questions, and provide input. Within the Data Profile, data should cover a five-year trend of unit performance, as available (for new or restructured units, trend data may not exist, but multi-year data should be included as available), as well as benchmarking to peer or industry standards.

## DATA PROFILE OVERVIEW

A typical Data Profile contains two sections. The first section, “Unit Composition,” provides general background data on the unit’s size and scope of operations. The second section, “Unit Performance,” covers key performance indicators. Key metrics will vary by unit; a sample outline of possible data points has been provided on the following page.

### I. Unit Composition

The section on unit composition should present the scope of the unit, in terms of size, organization, and unit responsibilities. Information will vary by unit, but should include an overview of the unit composition and key functions. For larger units, the Program Review Office will provide the unit with demographic data for staff.

### II. Unit Performance

#### A. Identifying What to Measure

For units without defined key performance indicators, Program Review presents an opportunity to identify metrics that would allow the unit to objectively measure and assess progress over time. For units with existing performance indicators, the review process presents an opportunity to refine existing measures and identify additional areas where data collection and tracking would be beneficial. Further, existing data helps units and the review team determine what services the unit should sustain or adjust based on the information.

To determine what the unit should measure, consider the following questions:

- How does your team/unit define success? How do you know if your unit is successful?
- How do you measure the impact of your unit?
- How can you demonstrate progress or improvement?
- How is accountability distributed for driving and improving unit performance?
- How do you identify and measure demand for the unit’s programs or services? How do you measure quality of the unit’s programs or services?
- What would indicate that a unit in your field was providing best in class service or was the leader among peers?

#### B. Developing Key Performance Indicators

Key performance indicators are measurable values that help a unit track performance in terms of meeting strategic or operational goals. Units have access to many types and sources of information, but not all data will be appropriate for a key performance indicator. To determine what data is relevant, the unit should identify what measurable values will help a unit track performance in meeting a strategic or operational goal. The unit should consider the timeframe being measured, the source of data, and the sustainability of tracking metrics. The unit should measure performance based on key performance indicators, as determined by the unit’s strategic plan, the University strategic plan, and/or industry best practices. For reference, a list of example key performance indicators is provided on page 5.

## DATA PROFILE OUTLINE

### **Part 1: Unit Composition**

- Organizational chart/structure/headcount by functional area
- Description of key unit functions/responsibilities
- Brief senior staff biographies/functional responsibilities
- Staff field-specific certification/qualifications summary (if appropriate)
- Staff headcount and demographic information, such as gender and race/ethnicity (provided by Program Review Office)

### **Part 2: Unit Performance**

#### Operational Metrics

- Number of customers/units served
- Ratio of staff in unit to staff/units supported
- Volume of transactions/requests processed
- Average response time for requests
- Number of iterations required/re-opened requests
- Number of incremental ad-hoc projects

#### Customer Satisfaction

As one measure of customer satisfaction, the Program Review Office will work in partnership with the unit to develop and administer a Customer Feedback survey. Other customer satisfaction data available in the unit might include:

- Average satisfaction score from prior customer feedback surveys
- Demand for service (e.g., increase/decrease in specific areas)
- Point of service feedback data (e.g., survey to users after a specific program or service is completed)

#### Peer Data

- Comparison of peer data on similar unit metrics
- Assessment of peer and industry data to determine baseline metrics
- Examples of external recognition (e.g., industry awards)

## DATA PRESENTATION AND VISUALIZATION

As part of the full set of review materials, the Data Profile must be accessible to both experts in the field and internal constituents who may not be as familiar with unit-specific metrics. To the extent possible, data should cover a consistent timeframe throughout the materials and be clearly labeled and contextualized for the unit, with attention to avoiding field-specific acronyms. Data should be presented in a visually appealing and easily digestible format – PowerPoint, Tableau, or Adobe PDF are the recommended formats to present final data.

Please reference the sample administrative Data Profile for guidance. As each administrative unit uniquely defines key performance indicators, the example Data Profile should be used to guide what type of data is collected and the format in which it could be presented. If desired, the Program Review Office can provide units with the standard PowerPoint template used for Data Profiles.

## DATA ITERATION

Administrative units have the primary responsibility for identifying what metrics are most appropriate for their unit. The Program Review Office will schedule at least one meeting to discuss the initial draft Data Profile, answer questions, and provide input. Throughout the data collection and visualization process, the Program Review Office is available to meet with the unit to discuss key metrics, coordinate centrally housed data when available, and review working drafts of the Data Profile.

## FINALIZED DATA PROFILE

The final Data Profile is included in the packet of review materials provided to the external and internal reviewers, line Vice President, and central administration (President, Provost, Senior Vice President for Business and Finance, Vice President of Administration and Planning, and Vice Provost for Administration). The Data Profile should support the analyses in other program review deliverables, such as the Key Issues and Self-Study documents.

## SUSTAINABILITY OF PERFORMANCE MEASURES

The unit should designate one or more staff members to own the processes of defining, gathering, and measuring key performance indicators, which allows units to sustain the measurement of unit performance beyond the program review process. Units have been successful in maintaining the sustainability of performance tracking when measures are regularly reported out to staff. For example, the Office for Sponsored Research regularly publishes [reports and metrics](#) to the research community, including downloadable reports.

## LIST OF EXAMPLE KEY PERFORMANCE INDICATORS

### Unit Composition

- Number of employees by functional unit
- Employment changes (terminations, hires, promotions, transfers)
- Trainings completed by employees
- Workload by staff member

### Operational Metrics

- Number of units/individuals served
- Volume of projects
- Impact/outcome of work
- Variance to budget
- Percent of compliant contracts
- Service request completion
- Energy use index
- Percentage on-time completion
- Review time
- Actual to plan budget
- Growth in transactions
- Volume of transactions
- Underutilized funds
- Amount of deficit accounts
- Time to approve new project
- Forecast to actual performance
- Days to close report
- Loans issued per quarter
- Number of reported safety incidents
- Number of ad hoc additions to plan
- Amount of unapplied cash
- Grants by school
- Support requests by school
- Proposals and awards by sponsor type
- Days to complete contract
- Proposals and awards by school
- Number of students served

### Customer Satisfaction

- Service rating
- Customer service survey results
- Office certification rate