



Texas Association for Institutional Research
Strategic Plan
2020 to 2025

February 2019

Draft

A Brief History of the Texas Association for Institutional Research (TAIR)

After five years of informal national gatherings, the Association for Institutional Research (AIR) incorporated as a non-profit organization in 1966. With a functioning national organization, Institutional Research professionals realized the need for professional development and broad discussion of issues at the state level.

A group of visionaries coalesced around the notion of a Texas professional society focused on institutional research and higher education. A small cadre of “take-charge Texans” (Horace Griffiths, Rude Gaedke, William Lasher, and Joe Szutz) organized the first conference of Texas institutional research practitioners in Austin in 1979. Annual conferences continued in Austin in 1980, Houston in 1981, and San Antonio in 1982.

By 1981, the group needed a more formal organization and Bill Lasher chaired a Constitution Committee that included Ross Clark, Les Kincaid, Pritch Smith, and Maryann Steele (now Maryann Ruddock Brown). In 1982, the membership elected Don Norris as TAIR’s inaugural President, Vicki Mason as Vice President, and Paul Thomas as Secretary-Treasurer.

In 1992, the Executive Committee expanded to four members as the role of Secretary-Treasurer became too big for one person. Thus, in Galveston, members voted to separate the roles of Treasurer and Secretary and elected Sidney (“Butch”) Prewitt as the first Secretary and Karlease Clark as the first Treasurer.

Needing a greater emphasis on communication/technology and professional development, the Executive Committee eventually expanded further by adding two member-at-large positions. While the titles evolved since their introduction, Brian Cordeau was elected to serve as the first Communications Officer in 2008, and Paul Illich was elected to serve as the first Professional Development Officer in 2009.

TAIR augmented its annual conferences by offering new professional development opportunities to members in annual summer workshops in 2007. These led to the introduction of a level 1 institutional research certification in 2015. In 2016, the initial class of 23 members received level 1 certification. TAIR introduced levels 2 and 3 in 2016.

Nearly 40 years into its story, TAIR is a thriving-vibrant association of institutional research professionals in one of the largest, most populous, and most dynamic states in the nation. Sharply focused on serving the professional development needs of its members, TAIR is a respected voice in higher education. TAIR acts as one of the largest affiliates of AIR and an exemplar of professional engagement and development for other state associations. Several TAIR leaders have served in important leadership roles in the Southern Association for Institutional Research, and two former TAIR Presidents (William F. Lasher and Glenn W. James) completed distinguished terms as AIR presidents.

The aptness of the adage, “the more things change, the more things stay the same” strikingly emerged in drafting this synopsis of TAIR’s history. Vickie Natale, TAIR’s 1996 President and TAIR’s 2000 Outstanding Service Award recipient, reflects: “what is most enlightening when looking at documents that are 25 to 30 years old is that so many of our current issues were the important issues back then. ... We were talking about outcomes measures and performance funding over 25 years ago; TAIR has long focused on accreditation, assessment, survey methodologies, the latest technologies, retention/graduation rates, and so on. Newcomers may think these are new challenges, but historical records reveal the consistencies over time.”

Thomas Martin, Vice President of Institutional Research
Collin College

Institutional Research

Who we serve is important in identifying our plan's priorities as an association. The role of institutional research has evolved and will continue to evolve. Our list of institutional research functions, in 2018, at the writing of this plan, is very different from those identified when our national affiliate, the Association of Institutional Research (AIR), formed in 1966. Over time, the institutional research function has spread beyond being conducted by a single person in a small administrative office into many offices across our campuses. As institutional researchers, we find ourselves partnering with colleagues from information technology, instruction, human resources, finance, and student services to provide information for decision support. Today, the practice of improving higher education and demonstrating its value is performed by the larger campus community. In 2017, AIR collaborated with the membership to form the list below, which frames the current expectations of Institutional Researchers.

Identify Information Needs: Participate in the iterative process of identifying relevant stakeholders and their decision support needs and assisting in developing and refining research questions, by anticipating questions through review of data, information, and research and policy studies and including those related to institutional, state, national, and international conversations around higher education.

Collect, Analyze, Interpret, and Report Data and Information: Perform the technical tasks needed to provide data, information, and analysis for decision support with an understanding of the data available to answer pressing questions about student access and success and institutional operations and the process by which previously unavailable data are collected. Researchers collect and report required and requested data and use applied research methods to analyze data to provide information for decision making, including appropriate interpretation of analysis results.

Plan and Evaluate: Collaborate with other units at the institution, state, or related organizations to develop operational, budgetary, and strategic plans and conduct program review, particularly for accreditation purposes. Provide institutional research data and analysis for use in formative and summative evaluation processes conducted at an institution for planning and decision-making purposes.

Steward Data and Information: Ensure an institution-wide data strategy in consideration of compliance issues such as privacy and security and ethical issues such as determining what data and information should be used for various purposes, and whether interpretations are correct and appropriately used. Contribute to data quality assurance activities and ensure data are appropriately accessible and usable to those who need them to make decisions.

Educate Information Producers, Users, and Consumers: Train and coach on the use of data, analysis, and information to inform decision making. Education can be focused on ensuring the ability to collect, access, analyze, and interpret information independently and in collaboration with other stakeholders. Convene discussions related to information needs and connecting internal and external producers and users of data with one another for purposes of informing decision making and conduct scholarship to inform and improve data, information, and analysis for decision support.

Mission Statement

The Texas Association for Institutional Research (TAIR) **serves** as a statewide network and **supports** Texas higher education professionals engaged in institutional research and institutional effectiveness in **providing** professional development opportunities by **coordinating** the exchange of ideas on common issues, **fostering** collaboration and communication, and **advocating** for data-informed decisions and policies in higher education.

Values

Coordination – form relationships to bring together the different elements of the complex activity of institutional research

Advocacy – speak from a common voice for researchers

Collaboration – promote an environment of cooperation

Communication – engage members in a dialog about institutional research

Education – share knowledge and practice

Goal – Advance institutional research proficiency



All Texas institutions of higher education benefit from a broader understanding of data science and greater levels of data literacy. The Association aims to maximize its resources in engaging in activities that increase the analytics, visualization, decision support, and reporting capabilities at all Texas post-secondary institutions regardless of their size, location, and resources.

Measures

- **Online Professional Development Opportunities** – Percentage of membership attending a synchronous or asynchronous TAIR online professional development opportunity. *Target – 50 percent annually by 2024*
- **Online Library** – Contributions to the TAIR library. The online library will allow members to submit and browse sample code, procedures, and studies. *Target – A minimum of 20 each year by 2025*
- **Outreach** – Percentage of TAIR members presenting at designated regional and national institutional research conferences. *Target – 10 percent annually by 2024*
- **Agency Speakers** – Representatives of state or federal agencies will address TAIR through TAIR’s outreach mechanisms (conferences, workshops, articles or submissions to the TAIR library). *Target – 3 engagements annually by 2024*

Strategies

Provide online professional development opportunities

- ❖ Publish a series of “How To” articles on the Association’s webpage
- ❖ Coordinate vendor-hosted webinars
- ❖ Create short guides for entry-level and experienced professionals

Establish a library to collect member expertise

- ❖ Facilitate an online code repository (e.g. SAS, R, etc.)
- ❖ Publish member-authored “best practices” in reporting, assessment, and other topics
- ❖ Poll members on conference topics before calling for presentations

Collaborate with other associations and Texas agencies

- ❖ Build a greater presence at regional and national institutional research conferences
- ❖ Encourage members of regional and national institutional research associations to present to the membership
- ❖ Invite State and Federal leadership to speak to members

GOAL – Develop a vital, diverse, and engaged membership



Strengthen the association by actively recruiting and engaging members throughout the region.

Measures

- **Member Retention** – Percentage of membership retained one year later. *Target – 80 percent annually by 2025 (50 to 55 percent between 2015 and 2017)*
- **Member Longevity** – The average years a membership persists. *Target – 5 years annually by 2024*
- **Presenting Members** – Percentage of membership presenting at TAIR conferences and professional development opportunities. *Target – 30 percent annually by 2023*
- **Institution Representation** – Percentage of Texas public and independent (as listed by the THECB) post-secondary institutions with Association membership. *Target – 100 percent annually by 2025*

Strategies

Promote the Association with all institutional research offices across the State

- ❖ Regularly communicate with institutional research offices across the State
- ❖ Distribute electronic flyers illustrating the value of Association membership
- ❖ Establish an ongoing membership drive
- ❖ Provide incentives for first-time conference attendees

Encourage membership in other campus offices (i.e., registrar, information technology)

- ❖ Establish a presence at non-institutional research conferences (i.e., TACRAO, TEXAAN, and TASSCUBO)
- ❖ Invite members of non-institutional research associations to present at TAIR

Connect new members to the Association

- ❖ Establish a mentoring program
- ❖ Encourage co-presentations of new and long-standing members
- ❖ Develop future leaders using succession plans for committee positions
- ❖ Publish a mentorship guide

Coordinate year-round member interactions

- ❖ Maintain a searchable, on-demand, online membership directory
- ❖ Catalog member areas of expertise
- ❖ Identify topical expert groups for members to call on for advice, consultation, and training

GOAL – Improve communication and visibility



Continue to build the Association’s brand by actively voicing meaningful issues and inventing ways to expand the reach of the Association’s voice all while maintaining a respectful presence.

Measures

- **Open Listserv** – Percentage of ListServ subscribers by non-members and other interested individuals. *Target – 10 percent of Listserv subscribers are non-members by 2023*
- **Advocacy Committee** – A group of TAIR members will monitor and communicate back to membership pending legislation, proposed rules, and other regulatory impactful issues affecting institutional research. *Target – 4 communications each year by 2023*

Strategies

Communicate more frequently with TAIR membership

- Improve newsletter content and distribution frequency
- Regularly engage membership on institutional research current events on Listserv (legislative, THECB reporting changes, etc.)
- Provide a State of Institutional Research at the conference (State and Federal legislative issues, industry trends, and emerging changes in practice)

Communicate with outside organizations

- Expand Listserv to non-members
- Engage researchers at State agencies and establish a common and consistent language for asking questions and reporting information
- Demonstrate the value of membership

Build a bigger Association presence by improving visibility

- Present institutional research issues at other associations’ conferences
- Invite officers from other associations (TACRAO, AIR, etc.) to give updates at TAIR

Advance the Association’s capacity to advocate

- Appoint a committee to monitor and communicate pending legislation, proposed rules, and other regulatory impactful issues
- Authorize the group to advocate for memberships and be a valuable resource for the Texas Higher Education Coordinating Board

Appendix A: External and Internal Environmental Scans

The Task Force met in November 2017 and concluded to effectively design an updated strategic plan for TAIR, a survey of membership would be needed to understand the current views on critical issues. The Task Force designed an instrument, which Nasreen Ahmad distributed to 847 current and past members, conference attendees, and points of contact from Texas institutional research offices. The Task Force administered the Survey in February 2018 and received 59 responses (7 percent). Please note some contacts are duplicate addresses for the same person and therefore the percentage does not represent a true response rate. Members responded from 30 institutions out of the 426 tracked by the Texas Higher Education Coordinating Board and the 471 Texas institutions reported to IPEDS, resulting in a 7 or 6 percent institution response rate.

The distribution of sample by accountability group is similar to the population, with the exception of Public Colleges or Universities, which responded at a much higher percentage. 48 percent of the respondents were from Public 2-Year Colleges (55% of the population), 31 percent from Public Colleges or Universities (16 percent of the population), and 14 percent from Independent Colleges or Universities (17 percent of the population).

Public, 2-Year and Public, 4-Year or Above Carnegie Classifications accounted for 40 percent of the sample, but 13 percent and 10 percent of the IPEDS population. The remaining responses came from Private not-for-profit, 4-Year or Above institutions, 17 percent compared to 14 percent. One institution provided insufficient identifying information to be placed in a sector. Private For-Profit, 2-Year and Private For-Profit, Less-Than 2-Year, which accounts for 38 percent of the population, did not respond to the survey and consequently are not represented in the results. Public, 2-Year institutions are overrepresented in the sample by 3 to 1 and Public, 4-Year institutions by 4 to 1.

Special thanks to Nasreen Ahmad of Collin County Community College for administering the survey and distributing the data.

Appendix B: Development of the Plan

Institutional researchers in Texas established the Texas Association for Institutional Research to collaborate and share practices conducive to disseminating information about and engaging institutional leadership in making data-informed decisions. In 2004, the executive committee realized the membership had grown to a point where Association planning was needed to optimize resources and fulfill the Association's purpose. A task force successfully developed a strategic plan and successive executive committees implemented much of the plan over the decade to follow.

TAIR President, Kara Larkan-Skinner, and Immediate Past President, Soon Merz Flynn, acknowledged the need to revise the plan after TAIR 2017 and charged a task force in September 2017 to conduct an environmental scan and develop goals, strategies, and measures. The task force's draft was presented to the executive committee in September 2018. The executive committee evaluated the draft, made edits, and presented the plan to the Association membership at TAIR 2019.

Charge to the Task Force

The strategic planning task force will review the mission of TAIR and update it as necessary, perform relevant environmental scanning, and solicit input from the membership in drafting a vision, goals, and strategies to guide the Association.

The strategic planning task force will draft a five-year strategic plan for TAIR for membership comment at the 2019 Conference Business Meeting and consideration by the executive committee. The plan will be final upon the executive committee's approval.

Appendix C: Task Force

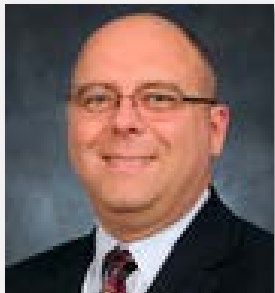
The 2018 and 2019 TAIR Executive Committees extend their sincere appreciation to the members of the 2018 TAIR Strategic Planning Task Force for their tireless dedication, abundant wisdom, and expertise in drafting TAIR's second strategic plan. The Plan shows the talent of our members, who will always be our greatest strength.



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