



Ad Hoc Reporting

Institutional Reporting Series

November 7, 2024



Meet Your Presenters



Lily Brennan

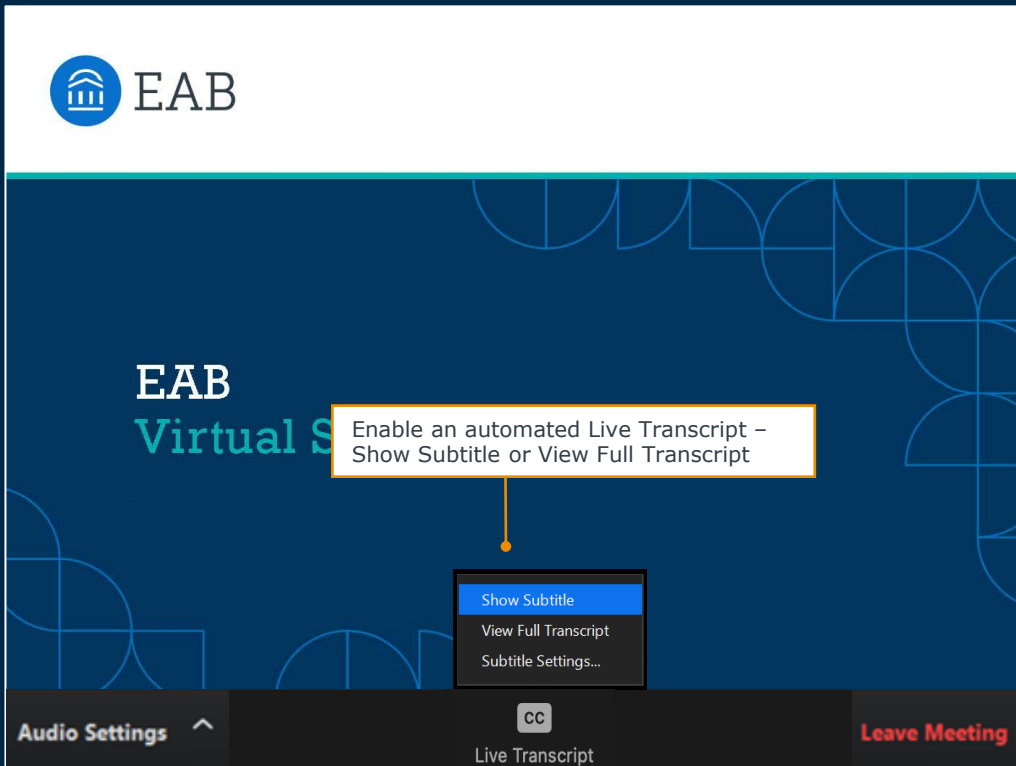
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Data and Analytics*



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Data and Analytics*

Turn on Captions



The screenshot shows a video player interface. At the top left is the EAB logo, consisting of a blue circle with a white building icon and the text "EAB". The video content area has a dark blue background with a pattern of light blue geometric shapes. The text "EAB Virtual S" is visible. A yellow callout box with a black border points to a "CC" (Closed Captions) button in the bottom center. The callout box contains the text: "Enable an automated Live Transcript – Show Subtitle or View Full Transcript". The "CC" button is a small grey square with the letters "CC" in white. Below the "CC" button is a dropdown menu with three options: "Show Subtitle" (highlighted in blue), "View Full Transcript", and "Subtitle Settings...". At the bottom left of the player is the "Audio Settings" button with an upward arrow. At the bottom right is the "Leave Meeting" button in red text.

EAB

EAB Virtual S

Enable an automated Live Transcript –
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Give the Chat a Try!



What's your favorite part of fall?





Ad Hoc Reporting

Institutional Reporting Series

November 7, 2024



Welcome to the Institutional Reporting Series!



Steps to Build, Use, and Evaluate Your Model

IPEDS Reporting

Delve into 3 key areas essential to any Rapid Insight user responsible for IPEDS reporting:

- Fixed width formatting
- Transposing data
- Creating flags for key demographics

Watch the recording

Accreditation Reporting

Learn how to align data analysis jobs with your institution's accreditation requirements like:

- Merging/appending tables where needed
- Performing known cleanup tasks
- Creating useful new variables

Watch the recording

Ad Hoc Reporting

Manage ad hoc requests outside annual compliance reporting more efficiently by:

- Using metadata to get a sense for the dataset itself
- Reviewing correlations between characteristics and outcomes

NOVEMBER 7



- 1 Discussion
- 2 Overview of Ad Hoc Reporting
- 3 How Rapid Insight Can Help
- 4 Managing Ad Hoc Reporting Requests
- 5 Wrap-Up and Support

Objective:

We want you to equip you with techniques to streamline ad hoc reporting through formalizing your ad hoc reporting request process, contextualizing ad hoc requests, and repurposing workflows in Rapid Insight.

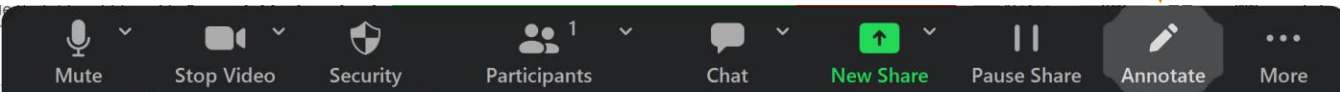


Discussion

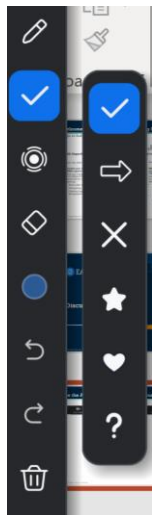
1

Use the Annotate Feature to 'Stamp' Your Vote

1 Find the Annotate option at the bottom of your Zoom screen.



2 Select "Stamp"



3 Click on the screen to add your stamp!

How would you describe your current IPEDS reporting process?

High Effort

A 2x2 grid is shown. The top-left cell contains a yellow star stamp. An orange arrow points upwards from below the grid to the star. The text 'High Effort' is written to the left of the grid, aligned with the top row.

Where do most of your ad hoc requests come from?

11

In what areas do you most frequently field ad hoc requests? (Stamp all that apply.)

Student Success Initiatives

Persistence rate for athletes, number of students in ____.

Diversity Metrics

Could be tied into grant requests, strategic planning, etc.

Enrollment Trends

How enrollment in specific majors or courses has changed over time

Survey Data

Correlating survey data to relate to other analyses

Cabinet or Executive Decision Support

Big picture questions related to strategic plan

Exploratory Analysis

Uncovering initial insights without a predetermined hypothesis

Reflecting on ad hoc reporting requests



How formalized is your ad hoc reporting request process?



We don't have a formal process. Requests come in through multiple modes (calls, emails, meetings, informal conversations).

We have a formal reporting request form or process, but it's not always used.

We have a reporting request form through which all requests must be submitted with few exceptions.



Overview of Ad Hoc Reporting

2

The Wide World of Ad Hoc Reporting



‘Ad Hoc’ describes a variety of reporting requests...

Student Success Analysis:

A department requests a report on retention rates among students who participated in a particular intervention, like tutoring or mentoring programs.

Course Success Rates:

A faculty member might request data on the success rates of students in a particular course over several semesters, segmented by prerequisites or co-requisite completion.

Grant Proposals:

A research group requires data on graduation rates and student outcomes for a grant proposal, particularly for a specific subset of students (e.g., first-generation or underrepresented populations).

Enrollment Trends:

A university administrator asks for a breakdown of enrollment trends by demographic groups for specific academic years, to evaluate outreach efforts.

Diversity Metrics:

The diversity office needs a report on demographic diversity by academic program to assess the effectiveness of DEI initiatives.

Student Survey Analysis:

A report may be requested to analyze data from student satisfaction or engagement surveys for a particular cohort, such as transfer students.

...but all involve creating data analyses and reports that are not part of the regular schedule of institutional assessments.

IR Offices Field Requests from Every Angle



Ad hoc reporting refers to custom, on-demand reports generated to answer specific questions or solve particular problems that arise outside of routine or standardized reporting processes.

Recurring Reporting

- While coordinating IPEDS, accreditation, and other routine reporting processes, Institutional Research offices can get pulled away by other pressing reporting needs.

President's Office

"We need to know the number of students from X county in STEM-related majors for a donor event in that county tomorrow."

Grant Proposals

"We need data on graduation rates and student outcomes for a grant proposal, particularly for Hispanic and Latinx students."

Student Success Center

"Can you tell us the final grade of students enrolled in Calculus II last term who attended 3 supplemental instruction sessions?"

And more...



Formalizing your ad hoc reporting request process

If your office doesn't already use one, consider utilizing a **reporting request form** for ad hoc data reporting requests.

The form can ask questions related to:

- Purpose of the report
- Specific questions/key data points needed
- Data scope (time period, student population, program enrollment, etc.)
- Report delivery (PDF, spreadsheet, raw data)
- Priority (urgent to long-range)
- Whether similar reports have been requested in the past



Template Report Request Form

If you're starting from scratch or want to revise your current reporting request form, you can edit our template report request form to fit your institution's needs.



EAB

Rapid Insight

Reporting Request Form Template

This form is for requesting reports from the [Enter IR Office name in this box] to support specific data needs or analyses. Please provide as much information as possible to help us understand the purpose, scope, and urgency of your request so we can process it efficiently.

Requestor Information:

- **Name:** Click or tap here to enter text.
- **Title/Position:** Click or tap here to enter text.
- **Department:** Click or tap here to enter text.
- **Email:** Click or tap here to enter text.
- **Phone:** Click or tap here to enter text.

Report Details:

Report Title/Subject: Click or tap here to enter text.

- **Purpose of the report:**
Explain how this report will be used and why it's needed. Be as specific as possible.
Click or tap here to enter text.
- **Specific Questions/Key Data Points Needed:**
List any specific metrics, KPIs, or data fields you need included. Examples: enrollment by department, retention rates by demographic, graduation rates for first-gen students, etc.
Click or tap here to enter text.

Data Scope:

- **Time Period:**
(e.g., Fall 2021-Fall 2023, last 5 years)
Click or tap here to enter text.
- **Student Population/Group:**
(e.g., all students, only first-year students, transfer students, specific majors or programs)
Click or tap here to enter text.
- **Other Filters/Criteria**
(e.g., specific demographic details, program enrollment, GPA range, etc.)
Click or tap here to enter text.

Desired Format:



How Rapid Insight Can Help

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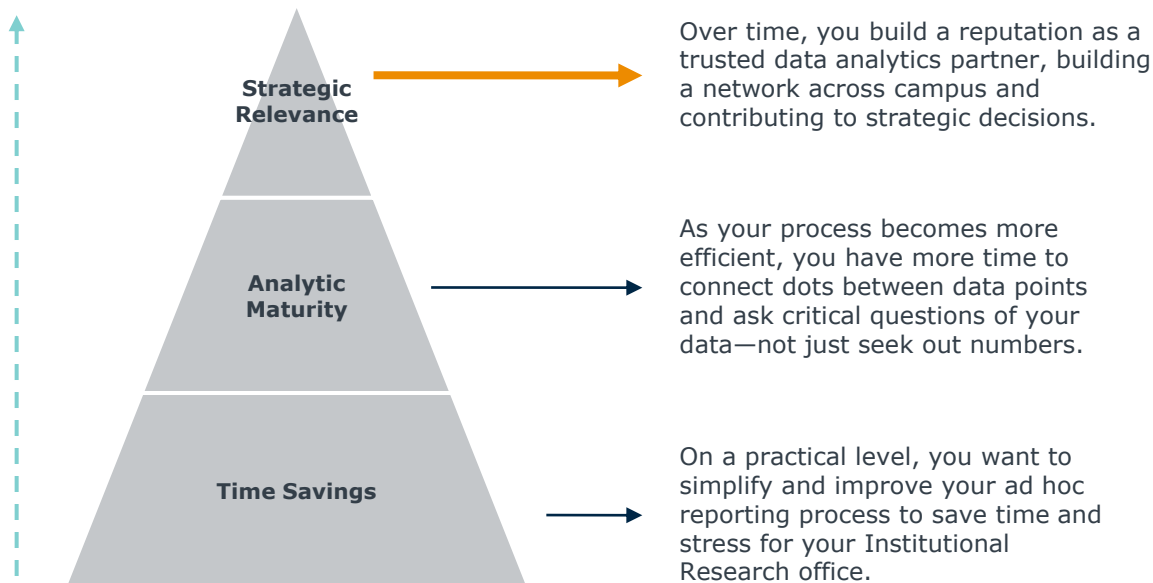


**To what degree do you agree with this statement?:
I feel equipped with strategies to manage ad hoc
reporting requests through Rapid Insight.**

Why streamline your ad hoc reporting process?



Processing ad hoc requests through Rapid Insight can move you closer to big picture data decisions at your institution.



3 Common Ad Hoc Requests and How to Tackle Them



Executive Leadership **Urgent exploratory analysis**

"We need to know the number of students from X county in STEM-related majors for a donor event in that county where the president is speaking tomorrow."

In the interest of time, you *can* design a job in Construct, but ultimately get the form of data you trust and don't worry so much about building a job for future use.

Student Success Initiatives **Decision support for uncharted territory**

"Can you tell us the final grade of students enrolled in Calculus II last term who attended 3 supplemental instruction sessions?"

Ideally, you've been involved in measuring the impact of this intervention from the start. Set up a Construct job that has a placeholder for the data, but the workflow fully designed. Input the new data source and run the job.

Funding and Grants **Gap fill for legacy reporting**

"We need data on graduation rates and student outcomes for a grant proposal, particularly for Hispanic and Latinx students."

Don't start from scratch:

1. Have we applied for this grant previously?
2. What did those reports look like?
3. Do you know anything about the previous data collection?



Live Demo

Construct

Managing Ad Hoc Requests

Beyond Rapid Insight



Questions to Consider



When do 'ad hoc' reports become scheduled reports?

Do you notice a particular department making the same request consistently? Maybe it's time to offer this report to them at a regular interval.



Can I train them to find answers to their questions?

It may be worthwhile to empower offices to seek the answers to simple questions themselves in the data.



How can we make this process easier on our office?

Implementing (and enforcing) a formalized report request process, contextualizing new data requests with past reports, and getting a seat at the table when data requests are proposed could help.



Wrap-Up and Support

5

3 Key Strategies for Managing Ad Hoc Requests

1

Formalize your ad hoc reporting request process

- Create a form for gathering ad hoc requests from offices at your institution.
- Empower offices to answer their own quick turnaround questions.

2

Contextualize ad hoc requests

- When possible, provide input in identifying opportunities for analysis, designing an evaluation strategy, and analyzing impact.
- Determine whether a similar analysis has been done in the past—what can you learn from the nature of this previous analysis?

3

Repurpose workflows

- Identify Construct workflows you've previously used and run them with new data.
- Use Construct to create jobs that will be useful to repurpose in the future.

Want to Dive Deeper Into Your Ad Hoc Requests?



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24	25	26	27	28	29	30



Rapid Insight Office Hours

Join us for an ad hoc exploratory session. Bring your ad hoc requests (current or past), and we'll walk through strategies to handle them.

Need help? We're here.

Contact us at:

rapidinsight@eab.com



1. To what degree do you agree with this statement?:
After today's session, I feel equipped with strategies to manage ad hoc reporting requests through Rapid Insight.
2. How was today's session?
3. We want to hear from you! Please provide feedback on today's session.

Rapid Insight Virtual User Gathering 2025

Elevate, Innovate, Celebrate | February 4, 2025

[Register Here](#)

Join us for an exclusive opportunity to connect with fellow Rapid Insight users and enhance your expertise within the platform. Our upcoming event is designed to foster community learning, celebrate institutional success stories, and offer hands-on training to maximize your use of Rapid Insight. Agenda highlights include:

Partner
Showcase

Networking
Breakouts

Product
Roadmap

Technical
Deep Dive

Get Involved! Call for Participation

Has Rapid Insight made an impact—big or small—on your work? Share your team's innovations and the impactful work you've accomplished at your institution. Submit your story through our online form by November 8.

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