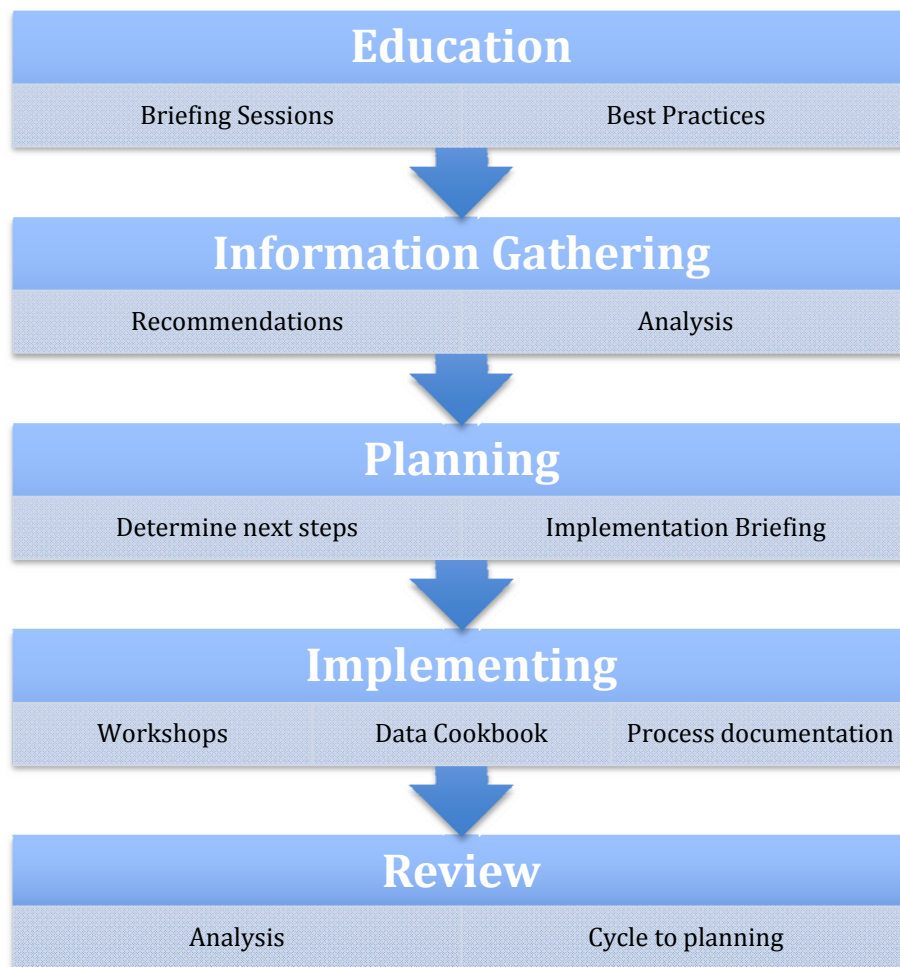


Data Management and Reporting Process Consulting

Overview

Below is an overview of our consulting process for evaluating and implementing data management and reporting process improvement.

Institutional reporting continues to be a struggle across higher education. It is our belief that this struggle is primarily caused by lack of communication, documentation and best practices in reporting. These can frequently be addressed by improving processes within the institution. IData would approach this in several phases: Education, Information Gathering, Planning, Implementing and Review. During each of these phases IData consultants will work directly with staff from all offices involved in the request, creation and consumption of reports within the administration. The Data Cookbook, an online collaboration, data management, and reporting knowledge base tool created by IData, will be used to support some of these processes and to provide a framework for better documentation and communication.



Phase 1: Education

IData will conduct an on-site briefing on some of the best practices and trends in institutional reporting. During this session, we can raise the level of understanding of all participants on the importance and benefits of good documentation and a shared transparent knowledge base.

Duration: one week (1-2 days on-site)

Phase 2: Information Gathering

IData will schedule and interview participants in each functional office. These interviews will be used as a method to capture current reporting practices and tools. Processes around reporting will also be documented during these calls. The outcome of this will be a document summarizing the reporting processes, tools and practices that are in place. It will also identify any key issues and root causes of those issues found during the interviews. Analysis of these root causes may yield recommendations that will be included in this document.

Duration: two to four weeks

Phase 3: Planning

IData will work directly with the leadership to review the recommendations and determine which will be undertaken and what next steps should occur. The result of this will be an on-site briefing of the findings and resulting recommendations to the participants.

Duration: two weeks

Phase 4: Implementing

IData will provide workshops for all participants in order to train and implement new reporting processes and the use of the Data Cookbook. These workshops will be provided as hands-on learning for the participants. Participants will be grouped by functional area so that the nuances of each areas' processes and requirements can be addressed uniquely. The goal of the workshops is to ensure that each participant understands the value and importance of the new processes as well as how this will be part of their day-to-day work. The outcome of this will be participants that can work with the new reporting processes and the Data Cookbook immediately and carry an understanding of the benefits these new processes can bring. An additional deliverable in this phase will be documentation on the new processes that can be used for incoming employees after this implementation phase.

Duration: four weeks

Tools: Data Cookbook license

For more information on the Data Cookbook you can visit www.DataCookbook.com

Phase 5: Support and Review

IData will offer as-needed support during an interim period following the implementation of the report process. After this interim period, IData will return for a review of progress of the participants. Each office will provide a review to IData of ways in which the new reporting processes have worked or failed in the interim period. The feedback gained in this cycle could feed additional workshops, or it could inform the leadership on other trends or issues that need to be addressed. This is the final phase of the planned work. At this point, we will have new reporting processes and the Data Cookbook in place and working, or there will be known issues to address which can feed another cycle of planning.

Duration: four weeks (support), two weeks (review)

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