



IPEDS 2009 TOOLS EXECUTIVE PEER TOOL



SECTION 1 INTRODUCTION

SLIDE 1

On behalf of the National Center for Education Statistics, NCES, and the Association for Institutional Research, AIR, welcome to this presentation on the IPEDS Executive Peer Tool, otherwise known as the ExPT. The ExPT is one of the IPEDS data access tools and it is used to produce Data Feedback Reports (DFR). We will examine the process, the output, and the value to higher education.

SLIDE 2

First, we will cover the IPEDS Data Feedback Report. We will go over the data elements and performance measures in the report and the relationship between the IPEDS Data Feedback Report and the ExPT.

We'll cover how you can use the ExPT to get an electronic copy of your IPEDS Data Feedback Report for the current and previous years and how you can use the ExPT to generate a new customized Data Feedback Report with data for the latest collection year. We will also show you how to access statistics and charts for a wide range of performance measures.

We will then describe the strengths and limitations of the ExPT. Finally, we will discuss how the Data Feedback Reports and the ExPT can be used in higher education.

SLIDE 3

The DFR contains graphs of critical indicators of institutional effectiveness, such as enrollment, tuition and fees, staffing, financial aid, etc.

It is published by NCES and mailed to college or university presidents each fall.

The ExPT is a tool for accessing and exploring the data behind the graphs in the Data Feedback Report. Actually, there are a lot more performance measures available to you through the ExPT than the dozen or so graphs in the official DFR. You can use any of the performance measures to create customized versions of the Data Feedback Report or to download statistical details and graphs.

ExPT is designed to be simple and easy-to-use and allows access to selected key elements of current year IPEDS. It does not allow access to all of the IPEDS data.

Let's talk a little more about the idea behind the development of the Data Feedback Report and the ExPT.

SLIDE 4

Both the Data Feedback Report and the ExPT were developed with the goal of improving the quality and comparability of IPEDS data and provide an easy way to get comparative data for institutional executives and administrators

If administrators realize and appreciate the benefits of IPEDS data as measures of institutional effectiveness, not only will the data get used, but the quality of the data submitted by the institutions will improve.

SLIDE 5

The IPEDS Data Feedback Report includes up to 12 figures, though the figures included in the report can vary slightly based upon the appropriateness of the data for institutions from various sectors. For example: graduate and upper division institutions do not have freshmen students so they will not have any data or figures that include full-time, first-time undergraduate students.

When an institution does not have all of the figures, they are renumbered to be sequential. Detail about each figure can be seen on the screen. Notice that Figures 3 and 4 are data about first-time undergraduates. These figures would not be included in the report for upper division and graduate institutions because they do not enroll first-time freshmen.

SLIDE 6

Moving on to the next set of figures, it is important to note that on figure seven, less than two-year institutions' graduation rates by race and ethnicity are not provided because the data are not collected.

These three figures show data about first-time, full-time, degree-seeking freshmen and graduate or upper division institutions do not report freshmen students, and therefore would not receive the figures.

Let's move on to Figures 8-12.

SLIDE 7

Figures 9 and 10 will differ depending upon the accounting standards used: GASB is used for most public institutions and FASB is used for private institutions and a small percentage of public institutions.

Since only degree-granting institutions report average salaries of full-time instructional staff, non-degree-granting institutions would not figure 12 in their report.

Now that you've seen the type of data each figure contains, let's see what the figures look like.

SLIDE 8

This is a sample of Figure 1. The figures use a horizontal bar chart showing your institution's data with the solid blue bar and the comparison group's data in the hatched bar. Each chart will show data for several measures with a comparison between your institution and your comparison group.

Notice the difference in enrollment numbers between the institution and its comparison group. Does it raise the question of the appropriateness of the comparison group? Later on, we will look at how you can use the ExPT to change the institutions in the comparison group.

The legend states that the data for the comparison group is represented by the median. Also notice that the number of institutions in the comparison group is displayed in parentheses next to “Comparison Group Median.” The median was chosen over the mean to decrease the impact of extreme values within a comparison group.

The notes at the bottom of the chart describe information that is important to the calculation and interpretation of these data, so it is always a good idea to check out these methodological notes.

There are more graphs available in ExPT than the dozen or so that come with the official DFR. Let us see what other institutional performance measures are in the extra data in ExPT.

SLIDE 9

In ExPT, an icon indicates which of nine data elements are in the official DFR, so it is easy to spot the additional ones. Some of them are not applicable to all institutions (the data may not be collected); however, for the applicable institutions, they are important measures of institutional effectiveness.

There are a few more data elements available that will be shown on the next screen . . .

SLIDE 10

Now that we have reviewed the IPEDS Data Feedback Report, let’s look at the ExPT and how you can use it to find your IPEDS Data Feedback Report and work with the data to customize your report.

SECTION 2

SLIDE 11

The ExPT is a web-based tool that allows users to access and customize their IPEDS Data Feedback Report and also access and download current and previous copies of the published DFRs. Electronic copies of the graphs and data in the current year reports can also be downloaded.

You can also customize your comparison groups and re-generate your DFR using a totally different comparison group.

There are three easy steps to getting your DFR.

SLIDE 12

First, enter the IPEDS Data Center from the IPEDS home page and then click on the link for the Executive Peer Tool.

Second, type in and select your institution. In ExPT, this is referred to as the focus institution.

Third, click on the icon that looks like a book with the label “Data Feedback Report” at the top of the screen.

A pop-up window will appear with the icon and date for each of the Data Feedback Reports that are available for download.

Here are the screen shots for each of these steps.

SLIDE 13

The Link for the Executive Peer Tool is the final link on the Data Center. When you mouse over the link, you see a brief description. Click on the link to enter the ExPT.

SLIDE 14

Now you are at the ExPT’s welcome screen. The system asks you to enter the name of the focus institution. The focus institution is the institution that the comparison group is being compared to in the ExPT. In most cases, you will type in the name of your institution, though you can use another institution as the focus institution. If you need help, click on ‘Need help with this feature?’

While you are typing in your institution’s name, you may get a list of institutions with similar names, from which you can select the one you want.

SLIDE 15

Clicking on the information icon to the right of the school you want produces a pop-up window with a link to the current DFR. Click on the link and you can view and/or download a copy of the current DFR.

You can download the file by doing a right mouse click on the link and selecting the “Save Target As” option. This will guide you through the process of saving the file to your computer.

However, there is more . . .

SLIDE 16

Click the “select” button for your focus institution and you will be taken to a screen from which you can access the DFRs for current and previous years (among other things).

You have now officially identified your focus institution for ExPT and can interact on many levels with the system. But our current task is to show you where you’ll get access to current and previous Data Feedback Reports. Notice the book icon on the banner at the top right of the screen? Click on it and you will get the pop-up window shown on the next slide.

SLIDE 17

These annual reports are available from 2005 to 2008. The documents are in PDF format, suitable for printing, but not editing.

Now that we've walked through the steps required to access your IPEDS Data Feedback Report, we will look at using the ExPT to create custom DFRs and Statistical Analysis Reports.

SECTION 3 USING EXPT TO CREATE CUSTOM DFRS AND STATISTICAL ANALYSIS REPORTS

SLIDE 18

The ExPT may be used to view printed IPEDS DFRs, create Custom DFRs, and create statistical reports on selected variables. The available options are listed on the screen.

SLIDE 19

There are three steps to creating new reports using the ExPT, which you can see listed across the top of the screen. The steps are shown below the banner at the top of each screen.

You can see on the banner shown that the bar under the step process darkens to indicate your stage in the procedure.

Each screen also has instructions that tell you what to do.

In the navigation area, you see the name of your focus institution and icons that allow you to start over, save, view DFRs and get help. There are also navigation buttons that allow you to go backward by using the Back button, forward by using the Next button, or to clear something you did on the screen by using the Reset button.

To change the focus institution, you must click on 'Start Over'. Now we can proceed.

SLIDE 20

With the focus institution identified, we are now ready for the first step—selecting the comparison group. Regardless of whether you intend to create a customized DFR or a Statistical Analysis Report, you need a comparison group.

Comparison groups must contain between 1 and 100 schools; however, some variables may not contain data if fewer than 5 schools are used. A comparison group of between 10 and 30 institutions is recommended.

This slide shows that there are five options for selecting a comparison group. If the focus institution does not have a custom comparison group, the first option is not available.

We will look at each option in turn.

SLIDE 21

The default option is the institution-defined custom comparison group. This is the comparison group that the institution has selected and given to NCES for use with the DFR. This option is available for those schools that have an institution-defined comparison group, and the automatic group option is the default for institutions without a custom group.

SLIDE 22

After selecting the institution-defined comparison and clicking the Next button a list of institutions appears. You can add or remove one or more institutions as you wish. You can have up to 100 institutions in a comparison group. A pane for editing the institutions comes up with each of the options you select for defining your comparison group.

Note the information icon adjacent to the school. It contains more information about the school that might be useful in determining whether you should include it in your group.

You can also view and print your comparison group, and once you are satisfied with the list of institutions, you can save it for use at other times.

SLIDE 23

When you click on the link to save the comparison group, this window pops up on your screen.

There are two options for saving. If you are using a computer that is not yours, e.g., in a lab, library, etc., and need temporary storage of the file for a few days, NCES will let you store it on their server for a month and will assign it a job number, which you will use when you want to upload the file the next time (within a month). If you are working from your own computer, you can save the file there. There is no time limit with this method. The file name must have a unit id extension for the NCES data tools to recognize it when you upload it later.

SLIDE 24

You can select the Upload Comparison Group option if you have previously saved a group of schools using the ExPT or another IPEDS data tool.

Let's move on from here.

SLIDE 25

There are two sections on the slide. The left section is for those who saved their file on their computer. The right pane is for those who temporarily stored their file on the NCES server.

If you stored the file at NCES, you'll need to enter the job number that provided on the right pane and submit.

If you have saved the file on your computer, you are most likely a Power User. However, if not, you can click on the Login button and then click on the Become a Power User link to register to become a power user. Your campus Keyholder is an automatic Power User.

SLIDE 26

This slide shows you the process of registering as a Power User. There is no cost, no hassle.

Let's move on.

SLIDE 27

Notice the change in the screen after login or registering to become a Power User. You can now browse to select and upload your file. Notice the right pane for users with files in temporary storage remains the same.

SLIDE 28

This pane should be familiar. The institutions are listed on the right, but you can still edit, add, remove, and save.

There are three more ways to construct a comparison group.

SLIDE 29

Add institution by name is a good option if you have a short list of institutions in the group you want.

SLIDE 30

As you type each name, click the Add button to attach the institution to the list you are building. Repeat the process until your list is complete. The institutions you have added now appear in the right pane. If you need help with this feature, use the handy help link.

Now let's look at the next option.

SLIDE 31

Add Institutions By Criteria allows you to match the institutions in your comparison group by characteristics of your choice. The characteristics of your focus institution will be highlighted so that you can use those factors as a guide in selecting your comparison group.

SLIDE 32

The criteria at your disposal include: state or outlying area, geographic region, degree-granting status, type of institution, size of institution, basic Carnegie classification, instructional programs by two-digit CIP code, Title IV status, or status as a Tribal college or a Historically Black College or University.

Note the counts of the maximum number of institutions, shown in parenthesis.

The map icon is another new feature. Click on it to get the map selector—a large U.S. map on which you can easily choose the geographic regions and states you need.

Notice the highlighted characteristics of the focus institution.

ExPT will allow your criteria to generate up to 500 institutions, but you then must select no more than 100 for your comparison group. One way to do this is to refine your selection criteria.

SLIDE 33

ExPT places the schools selected by criteria in the left pane. You can move individual institutions by checking the checkbox and clicking the Add button to move an institution to the

right pane. Click on the Select/Deselect All link to select or deselect all of the institutions. You can also select all and then deselect individual institutions. If you want to remove an institution from the list, click on the Delete Selected link.

The Add and Remove buttons in between the panes allows you to move institutions between the left and right panes.

Notice that you can add more institutions by name, if one or two that you wanted fell through the cracks of your criteria.

Next, we'll look at the final option for creating a comparison group.

SLIDE 34

The last option for selecting a comparison group is the automatically-generated comparison group. Within ExPT is an algorithm to automatically generate a comparison group for any school. Although not every school finds this list acceptable, using the auto group is a quick way to get a peer group if you just need it for familiarizing yourself with the features of the ExPT.

Let's click on the next button and see what we get.

SLIDE 35

Notice that ExPT shows you the criteria used in generating the automatic comparison group. This is helpful if you want to edit the list, add additional schools by name and save the comparison group.

Now it is on to Step Two –selecting the variables.

SLIDE 36

ExPT first asks you to choose whether you want to create a Statistical Analysis Report, or Custom Data Feedback Report. Click on the adjacent information button to get a brief description of what the report will contain. You will be able to view and download statistics, tables, and graphs of data you select for the focus institution and comparison group.

SLIDE 37

Let's look at the information button for the Custom Data Feedback Report. This option produces for you a replica of the official DFR, but you can customize the comparison group and select your charts of interest.

This option does not allow individual selection of variables within a chart, only the selection of whole, predefined charts.

Now we'll select variables for the Custom Data Feedback Report.

SLIDE 38

You can click on the plus sign alongside the variable name to open the heading and see the available charts.

Any variable in ExPT can be used for the customized DFR. However, if you're interested in the variables that are in the official DFR, look for the little book icon next to the variable name.

Now that we have selected some variables, let's see what our output looks like.

SLIDE 39

In the Custom DFR option, your output will look like the published version of the DFR, with charts, methodological notes, etc. You can download the charts through the handy PDF files that are provided for you.

SLIDE 40

The cover of the customized DFR report looks just like the official DFR except that it has "Executive Peer Tool Customized" in the title.

While this is very handy, perhaps you need to have the data behind these charts. If that's the case, you'll have to go back and generate a Statistical Analysis Report.

SLIDE 41

In Step two, Statistical Analysis Report is the default option. If we click on the information button, we'll get a brief description of the Statistical Analysis Report. This is an online report of statistics, tables and graphs of your selected data for your focus and comparison group.

We're going to click on the Next button.

SLIDE 42

We are now asked to select our variables for the report. As in the Customized DFR option, you can select any of the variables. Again, variables that are part of the official DFR are denoted by the book icon.

We've selected some variables for the report and now we can look at the output for the Statistical Analysis Report.

SLIDE 43

The output page has two tabs: Statistics and Data. We are currently on the Statistics tab and we are provided with the variables we selected with the values for the focus institution and the group median values for the comparison institutions.

At the top right, notice that you can modify your variables and your comparison group, or start over. These options make it easy to get output on different measures for the same group; generate the same output for the focus institution with a different comparison group; or edit the comparison group. After making your selection in either of these options, click on the 'Next' button to return to the output screen, and instantaneously your new results will be produced.

There are two more links at the top right. One allows you to change your focus institution by clicking 'Start Over'. You will have to redo comparison group selection and the other two steps

in the process. The other link takes you back to the IPEDS home page when you have completed your session with ExPT.

You can download this data in Excel format by clicking on the “Download Statistics” link.

If you’ll look at the far right of the data, you’ll see an icon that looks like a bar graph. This icon brings up the graph of the statistics data.

Let’s see what that looks like.

SLIDE 44

Here is a nice bar graph that looks much like the graphs we produced using the Customized DFR option. If you want to download the graph, you can click on the “Download Graph” link.

Let’s go back to the Data tab.

SLIDE 45

The data tab shows you the data for the variables, by institution, for your peer group. Depending on the number of variables selected, you may have multiple pages. Use the paging buttons to navigate through multiple pages of output.

If you’d like to sort the data by a variable, click on the variable name and ExPT will re-sort the data by that variable.

Click on the “Download Data” link to get an Excel file.

Remember, you cannot produce data per institution using the DFR option. The DFR produces charts only.

Let’s go ahead and download the data.

SLIDE 46

First, you will get the File Download message. You can either select Open to view the file immediately or Save to save the file and open it at a later time.

When you open the file, you will get a file that looks like this.

SLIDE 47

So far we’ve looked at the IPEDS Data Feedback Report and the data elements and performance measures included in the report.

We have looked at the relationship between the IPEDS Data Feedback Reports and the Executive Peer Tool, including the steps to get an electronic copy of the DFR through the ExPT and using the ExPT to customize your DFR.

As we finish up, we will look at the strengths and limitations of the ExPT and we will talk about how we can best use the Data Feedback Reports and the ExPT in higher education.

SLIDE 48

The ExPT does exactly what it was designed to do.

It provides access in a simple and straightforward manner. You gain access to a limited number of variables, but they are all data elements that are institutional performance measures and can serve as a dashboard that an institution can update annually.

It easily provides data at the institution level. While it provides data on your institution, it allows you to gain access to the institutional data of the schools in your comparison group.

The data are tied directly to the Data Feedback Report but you can also copy the data or download it into a spreadsheet.

ExPT can certainly whet your appetite for more information.

SLIDE 49

ExPT's limitations were actually designed into it and make it easier to use.

First, you can only have 100 institutions in your comparison group at one time.

Second, you have limited options for picking comparison institutions. If you are trying to discover other possible comparison institutions out there in the IPEDS universe that are similar to yours, the ExPT system may not be the best tool for doing so.

Last, the ExPT gives you access to a limited number of key IPEDS variables. The IPEDS Data Center has a great deal more.

SLIDE 50

Would the Data Feedback Report, used in conjunction with the ExPT, be a good first step in doing some benchmarking? Maybe you will find other uses for this tool.

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I hope that you will find the ExPT easy to use and that it will make your work easier too. If you have questions or problems using this tool or any of the other IPEDS tools, please contact the IPEDS Tools Help Desk by calling 1-866-558-0658 or send a note to ipedstools@rti.org.