Project: **Academic Performance Solutions (APS)**

**Project Leadership**

**Executive Sponsors**
- Terry Johnson – CFO and Treasurer
- Don Szeszycki – Associate Vice President and Director of Administration and Planning

**Project Manager**
- Karna Wieck – Director of Administrative Planning & Operations

**Technical Lead**
- Mike Noel – Senior IT Director

**Project Overview**

The University of Iowa is participating in the Education Advisory Board (EAB) Academic Performance Solutions (APS), a membership service through which member institutional data is extracted, validated, and re-aggregated in order to construct analytical reports and dashboards related to critical cost, capacity, enrollment, and student outcomes metrics. The service also provides benchmarks across participating peer institutions.

After working with EAB to identify the required data elements from UI's student information, human resources, and finance systems, the UI project team will extract those data and coordinate with EAB to input them into the APS framework. At the same time, the UI team will capture the APS data in the form of warehoused views, to facilitate ongoing internal analysis.

**Project Purpose and Benefits to Campus**

The University of Iowa’s goal in participating in APS is to provide the provost, deans and associate deans, department heads, business officers, and other senior leaders with integrated data analysis to support strategic decision making, effective resource planning, and student success. This information will also support academic program review, and enable year-over-year comparisons against internal and external benchmarks.

With data compiled from multiple UI sources, both EAB and the UI will be able to develop reports and dashboards that offer unified analytics at the institutional, collegiate, and departmental levels. Typical project reporting deliverables include:

- Mix of students (what are the characteristics of students taught at a given level)
• Student progress barriers (e.g., course completion rate vs. total attempted credit hours by course)
• Class size and seat utilization
• Faculty and instructor mix
• Direct cost reports

The UI may also benefit from some of the other resources EAB provides to its member institutions, including best practice research, facilitation of peer networking, and consulting services (https://www.eab.com/).

Project Scope

Because APS is a new service provided by EAB, the exact scope is still being determined by the founding members. In the inaugural year, we expect the following project scoping.

In scope:
• Processes
  o Student Enrollment, Progression, and Capacity Planning
  o Faculty/Instructor Workload Optimization
  o Student Credit Hour Cost and Resource Allocation
• Data
  o Student – Course, Student, Instructor, Billing
  o Human Resource – Employee, Position, and Payroll
  o Financial – General Ledger
  o Classroom Space

Not in scope:
• Processes
  o Research Administration
• Data
  o Sponsored Programs Grant Proposal Routing
  o Pre- and Post-Award Grant Accounting
• EAB Student Success Collaborative

Year 2 and 3 project scope, deliverables, and timelines will be determined by EAB, APS founding members, and executive sponsors.

High-Level Requirements

• The UI project teams will work with EAB to identify and extract data elements from UI’s student information, human resources, and finance systems as required for complete and accurate analysis within APS.
High-Level Risks

- APS is new to the EAB service portfolio. It is being designed and developed by the founding members. Being a new service under development, its processes may not be as refined and complete as with a more mature service.
- The University of Iowa is a founding member of APS. This means we will have the opportunity to help shape the service and solution, but also means that peer data available to us for benchmarking may not be as robust as we would like in the early stages.
- The University of Iowa has an internally developed student information system, so data mapping and extracts will be more difficult than with the PeopleSoft Finance and Human Resource modules.

Assumptions and Constraints

Assumptions:
- For security reasons, the University of Iowa staff will be responsible for data extracts and transfers to EAB.
- The finance general ledger and HR data extracted will initially be limited to expenditures for the collegiate orgs (orgs 11-39).

Constraints:
- Due to new student information system implementation, the university will only provide three years’ worth of data (beginning with fall 2013). The intent is to build toward a complete five years’ worth of data.

Milestones

The university has committed to a three-year engagement with EAB (after which time the university will evaluate whether to continue the relationship). During the first year, the university will focus on defining the data that will help departments take a closer look at instruction while evaluating the tools and reports APS will offer.

The following are projected timelines for the first two years of the project. Actual milestones will depend on successful completion of prior steps. Year 3 project scope, deliverables, and timelines will be determined by EAB, APS founding members, and executive sponsors.
(Years 1 & 2)

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<thead>
<tr>
<th>Task</th>
<th>Responsible</th>
<th>Target Date</th>
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<tr>
<td>Technical kick-off call</td>
<td>EAB, UI Project Teams</td>
<td>March 10, 2016</td>
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<tr>
<td>Institutional kick-off meeting</td>
<td>EAB, UI Project Teams, Campus Stakeholders</td>
<td>March 24, 2016</td>
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<tr>
<td>Sample Institutional Scorecard</td>
<td>EAB</td>
<td>April 26, 2016</td>
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<tr>
<td>Data identification and extraction – Student Information</td>
<td>Student Information Team, EAB</td>
<td>May 2, 2016</td>
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<tr>
<td>Sign-off on data validation – Student Information</td>
<td>Student Information Team</td>
<td>May 24, 2016</td>
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<tr>
<td>Student Information Configuration Discussion</td>
<td>Student Information Team</td>
<td>May 31, 2016</td>
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<tr>
<td>HR &amp; Finance Data identification and extraction – Finance (fy13-14 and fy14-15)</td>
<td>Finance Team, HR Team and EAB</td>
<td>June 7, 2016</td>
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<tr>
<td>Student and capacity scorecards delivered</td>
<td>EAB</td>
<td>June 21, 2016</td>
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<tr>
<td>Scorecard Review</td>
<td>APS Project Team &amp; Associate Deans</td>
<td>June - August</td>
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<tr>
<td>Submit FY15-16 HR &amp; Finance Data &amp; Signoff</td>
<td>Finance Team, HR Team and EAB</td>
<td>August/September</td>
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<tr>
<td>Facilitate APS Orientation for deans</td>
<td>EAB</td>
<td>September</td>
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<tr>
<td>Executive sign-off on student and capacity scorecards</td>
<td>Executive Sponsors</td>
<td>September 1, 2016</td>
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<td>EAB Site Visit/Summit and EAB On-site Visit</td>
<td>EAB/Project Director</td>
<td>October, 2016</td>
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<tr>
<td>Finalize Cost and Faculty scorecard reviews</td>
<td>EAB &amp; Executive Sponsors</td>
<td>December, 2016</td>
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<tr>
<td>Identify initial Best Practice Intensive topics</td>
<td>EAB</td>
<td>December, 2016</td>
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<tr>
<td>Best Practice Intensive College of Liberal Arts and Sciences Focus &amp; Prepare UIowa data for platform</td>
<td>EAB</td>
<td>Q1 2017</td>
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<td>Automated Platform Deployment &amp; Training</td>
<td>EAB</td>
<td>Q2 2017</td>
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<tr>
<td>Dean Intensives &amp; Value Summit to plan for Year 3</td>
<td>EAB</td>
<td>Q3 2017</td>
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Stakeholders

Key stakeholders for this project (those who will likely use the reports and dashboards produced to inform their strategic decision making) include:

- Office of the Provost
  - Undergraduate Education
  - Faculty Human Resources
  - Information and Resource Management
- Colleges
  - Deans and associate deans
  - Departmental executive officers & administrators
  - Budget officers
- Controller’s Office
  - Accounting and Financial Reporting

APS Project Team

Student Information System (MAUI) Team

  Julie Fell – Senior Associate Registrar (Functional Lead)
  Bill Evanson – Lead Application Developer, Student Information System (Technical Lead)
  Renee Houser – Senior Associate Registrar

Human Resources Team

  Michael Kaplan - Director Admin Systems, Information Management/HR (Technical Lead)
  Terri Hein – Director, UI Payroll Tax/Accounting & Budget Officer
  Dan Schropp – Director, UI Payroll Operations

Finance Team

  Selina Martin, Associate Controller (Functional Lead)
  Jason Heath – Lead Application Developer, ITS Administrative Information Systems (Technical Lead)
  Ronda Simpson – Associate Budget/Financial Officer, Office of the Provost
  Dan Roach - Lead Application Developer, ITS Administrative Information Systems
  Marty Miller, - Director, Billing Information Systems

Additional UI Resources

  Ed Hill – Senior Application Architect, ITS Administrative Information Systems
  Brenda Ulin – Database Architect, ITS Administrative Information Systems
  Kristina Yows – Senior Application Developer, Office of the Provost

EAB Consultants

  Maureen Hahn, Harrison Greer, Gwen Perrin, Matthew Hagerty (December 2016)