New Project Management Framework for Institutional Research

Workshop

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Opening

Goals of the Workshop

Participants will be able to use our framework to:

1. Review the current office projects

2. Improve the *efficiency* and *effectiveness* of the office operations

Participant Introduction

Please introduce yourself by answering the questions:

1. **How do you currently manage your office projects?**

2. **What are your expectations for this workshop?**

HELLO
MY NAME IS

Workshop Agenda

Time	Activity
13:35 – 13:45	Opening
13:45 – 13:55	Introduction to the Four-quadrant Framework
13:55 – 14:05	Exercise I Application of the Framework
14:05 – 14:10	Exercise II Strategic Project Management for the Next Year
14:10 – 14:20	Group Discussion Peer Feedback on Office Projects and Operations
14:20 – 14:25	Closing

Introduction

to the Four-quadrant Framework

Have you been busy with

ever-evolving

data requests and reporting?

Efficiency:

an ability of producing data within a given timeframe and available resources

Have your data and reports had **any impact** on decision-making or enhancement?

Effectiveness:

an ability of promoting data utilization in decision-making

Conventional Project Management Log

Example of IR Project Log

Project Title	Client	Due Date
Internal Report	Pro VC	ASAP
Government Report	Vice-Chancellor	Tomorrow
Strategic Indicator	PVC - Research	Last Week
NSS Benchmark	PVC - Education	Next Month
Module Evaluation	Dean X	Next Year
Self-study Report	Dean Y	Last Year

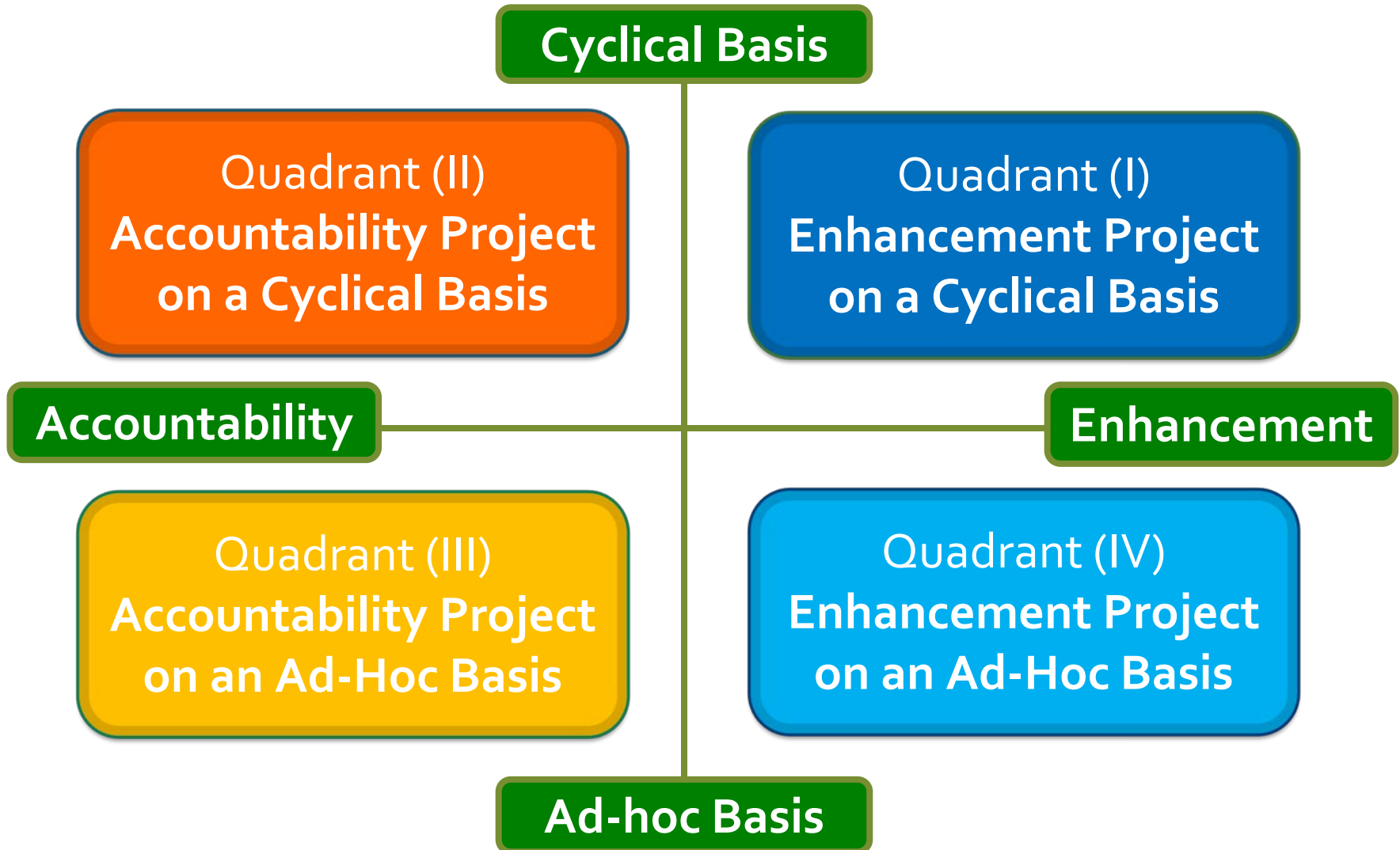# Reflection on the Conventional Practice

Strength

Able to monitor the progress of different projects

Weakness

Lack of monitoring the use of IR data and reports in decision-making

Four-quadrant Framework - Design

Cyclical Basis

Quadrant (II)
Accountability Project on a Cyclical Basis

Quadrant (I)
Enhancement Project on a Cyclical Basis

Accountability

Enhancement

Quadrant (III)
Accountability Project on an Ad-Hoc Basis

Quadrant (IV)
Enhancement Project on an Ad-Hoc Basis
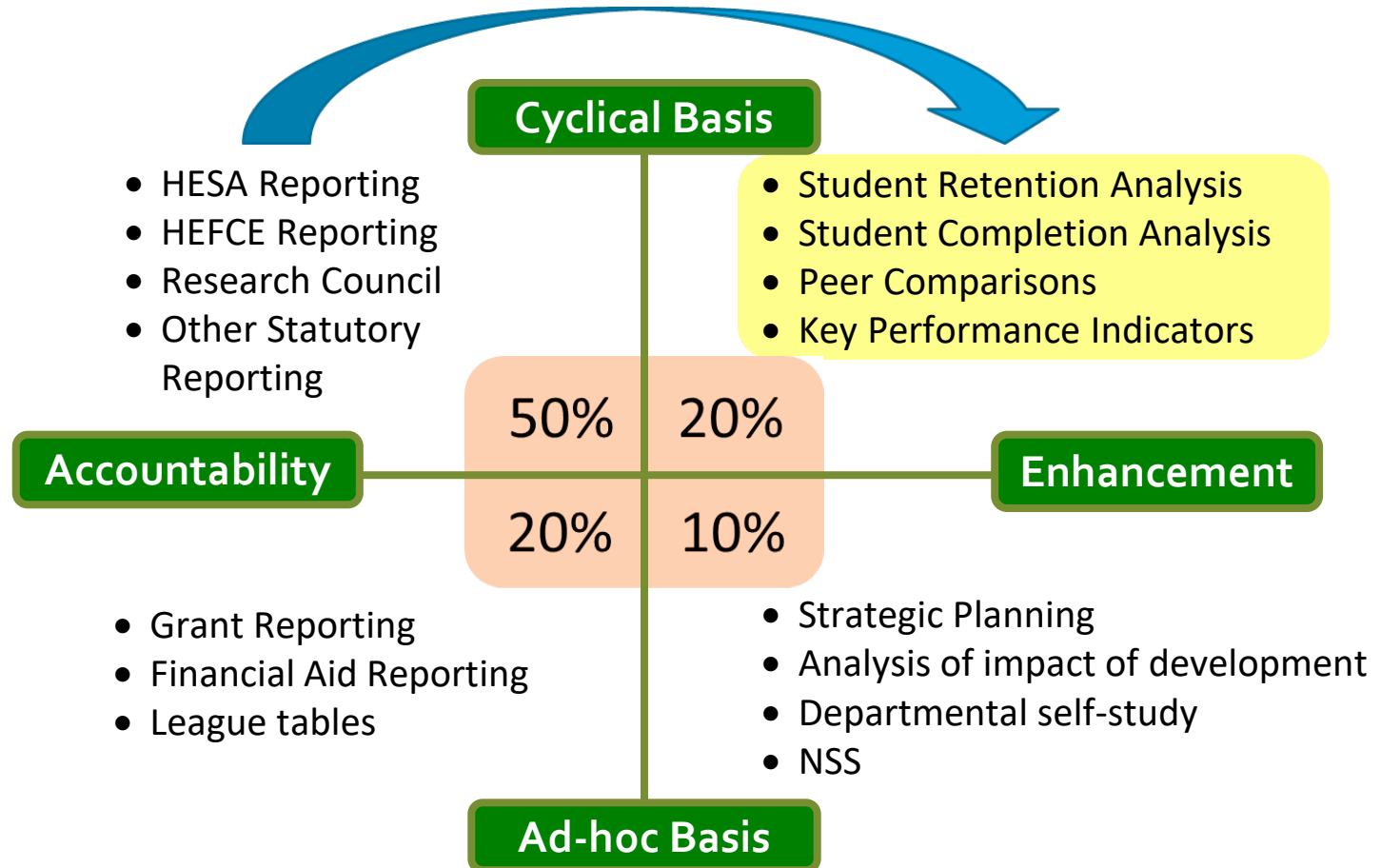
Ad-hoc Basis

Four-quadrant Framework - Example
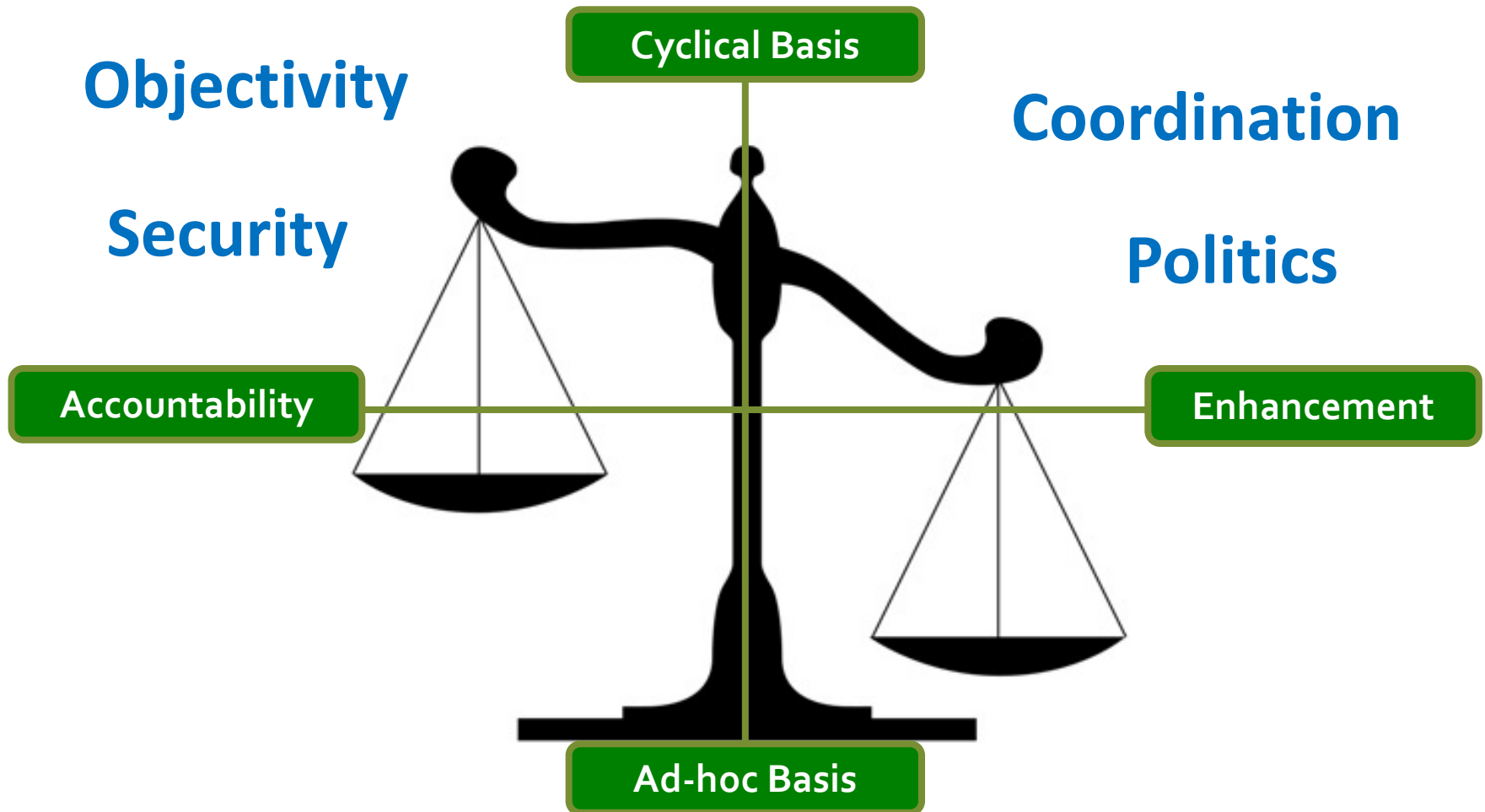
Example: University X

Personnel
PVC (Research /L&T etc)
Associate Head of
Human Recourses
Department Head

Org Context
Institution Report
Report to
Governors
New Vice
Chancellor

Cyclical Basis

- HESA Reporting
- HEFCE Reporting
- Research Council
- Other Statutory Reporting

- Student Retention Analysis
- Student Completion Analysis
- Peer Comparisons
- Key Performance Indicators

Accountability 50% | 20% **Enhancement**

20% | 10%

- Grant Reporting
- Financial Aid Reporting
- League tables

- Strategic Planning
- Analysis of impact of development
- Departmental self-study
- NSS

Ad-hoc Basis

Insight and Consideration

Balancing between
Accountability and Enhancement

Summary Comparison

Not mutually exclusive, but all inclusive

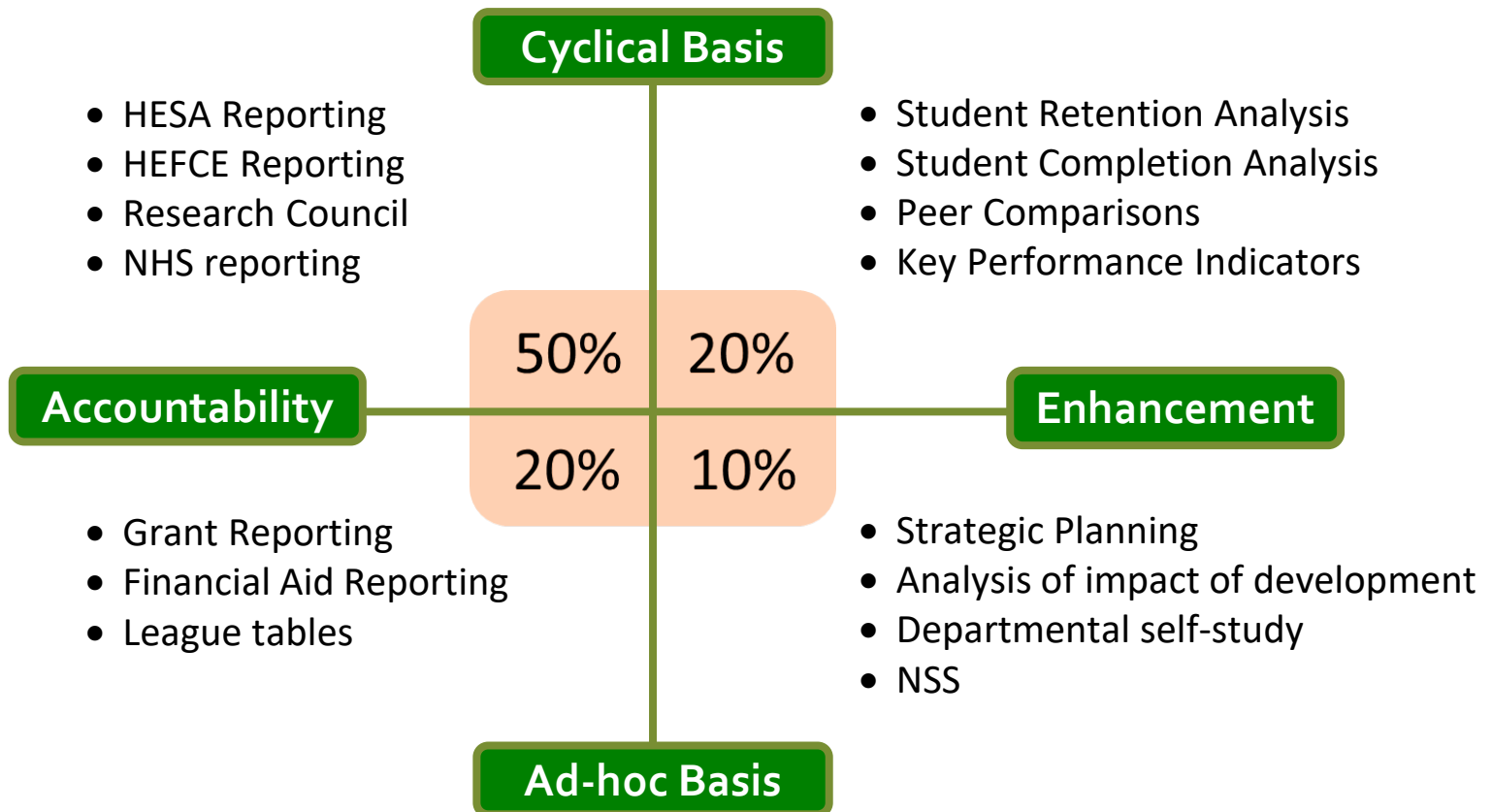|	Conventional Project Log	Four-quadrant Framework
Context	Numerous data requests	Emphasis on enhancement
Focus	Efficiency	Effectiveness
Purpose	Monitor the progress of projects	Review and strategize project operations

Exercise I

Application of the Framework

Develop your Four-quadrant Analysis - 1

Step I: List all the projects your office manages and categorize them into the four quadrants.

Step II: Identify **a proportion of total work hours** that your office spend in each quadrant (See **Orange** in the diagram).

Cyclical Basis

- HESA Reporting
- HEFCE Reporting
- Research Council
- NHS reporting

- Student Retention Analysis
- Student Completion Analysis
- Peer Comparisons
- Key Performance Indicators

Accountability   **Enhancement**

50%	20%
20%	10%

- Grant Reporting
- Financial Aid Reporting
- League tables

- Strategic Planning
- Analysis of impact of development
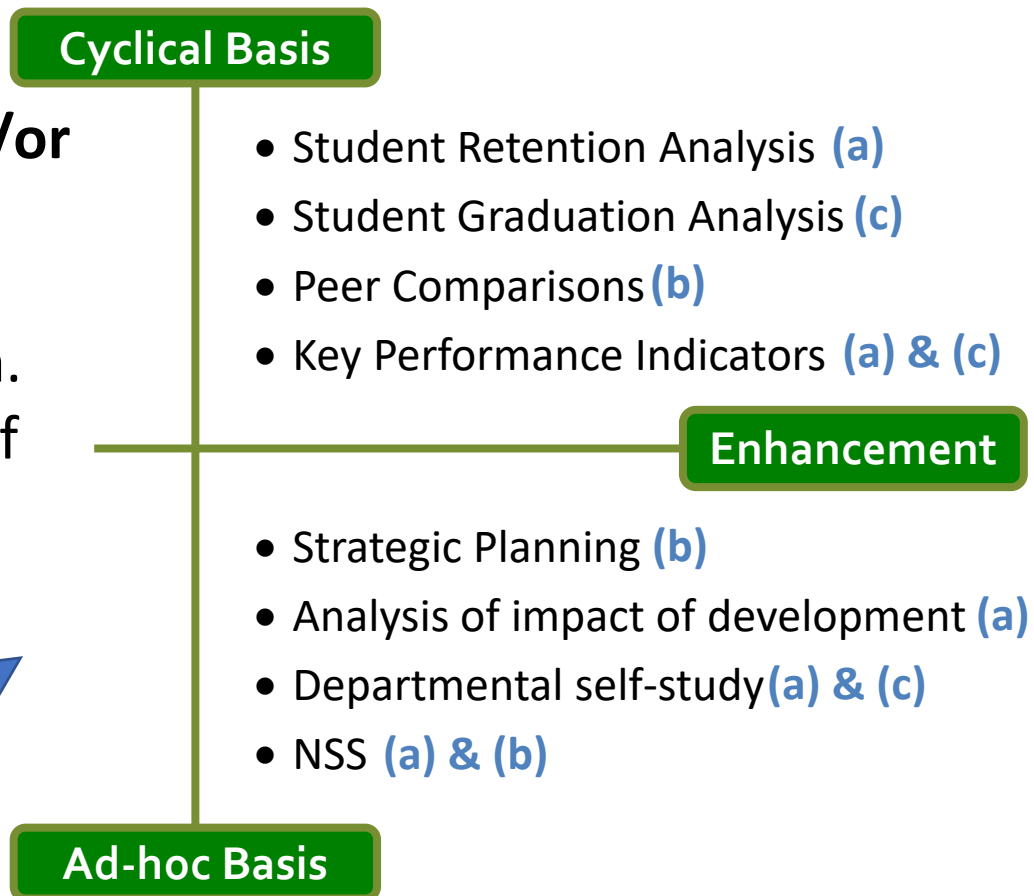- Departmental self-study
- NSS

Ad-hoc Basis

Develop your Four-quadrant Analysis - 2

Step III: Identify the types of data utilization for continuous improvement

(a) Identifying problems,
(b) Developing solutions, and/or
(c) Evaluating results

See **Blue** tags in the diagram. The results imply a degree of effectiveness.

Bottom-line Question
What changes have been made?

Cyclical Basis

- Student Retention Analysis **(a)**
- Student Graduation Analysis **(c)**
- Peer Comparisons **(b)**
- Key Performance Indicators **(a) & (c)**

Enhancement

- Strategic Planning **(b)**
- Analysis of impact of development **(a)**
- Departmental self-study **(a) & (c)**
- NSS **(a) & (b)**

Ad-hoc Basis

Developing Your Four-quadrant Analysis

1. Categorise your office projects based on your initial insight

2. No right or wrong answers

Q1. What should I do when the use of our data and reports is unknown?

Suggestions

1. List the projects on the axes

2. Follow up with your stakeholders about these projects

Q2. What should I do when one project appears in multiple categories?

Suggestions

1. List the project in multiple quadrants by indicating the primary and secondary purposes

2. Consider the primary purpose of a project to be improvement, if reporting is not required

Exercise II

Strategic Project Management

For the Next Year

Examine key projects and office operations with the following questions:

1. **What are your strategies to increase the *efficiency* of generating data and reports?**

2. **What are your strategies to increase the *effectiveness* of using data and reports for enhancement?**

Discussion Questions on *Overall Operations*

Cyclical Basis

- HESA Reporting
- HEFCE Reporting
- Research Council
- NHS reporting

- Student Retention Analysis
- Student Completion Analysis
- Peer Comparisons
- Key Performance Indicators

Accountability

50% | 20%

Enhancement

20% | 10%

- Grant Reporting
- Financial Aid Reporting
- League tables

- Strategic Planning
- Analysis of impact of development
- Departmental self-study
- NSS

Ad-hoc Basis

Priority
Which project needs to be re-prioritized?

Organizational Structure
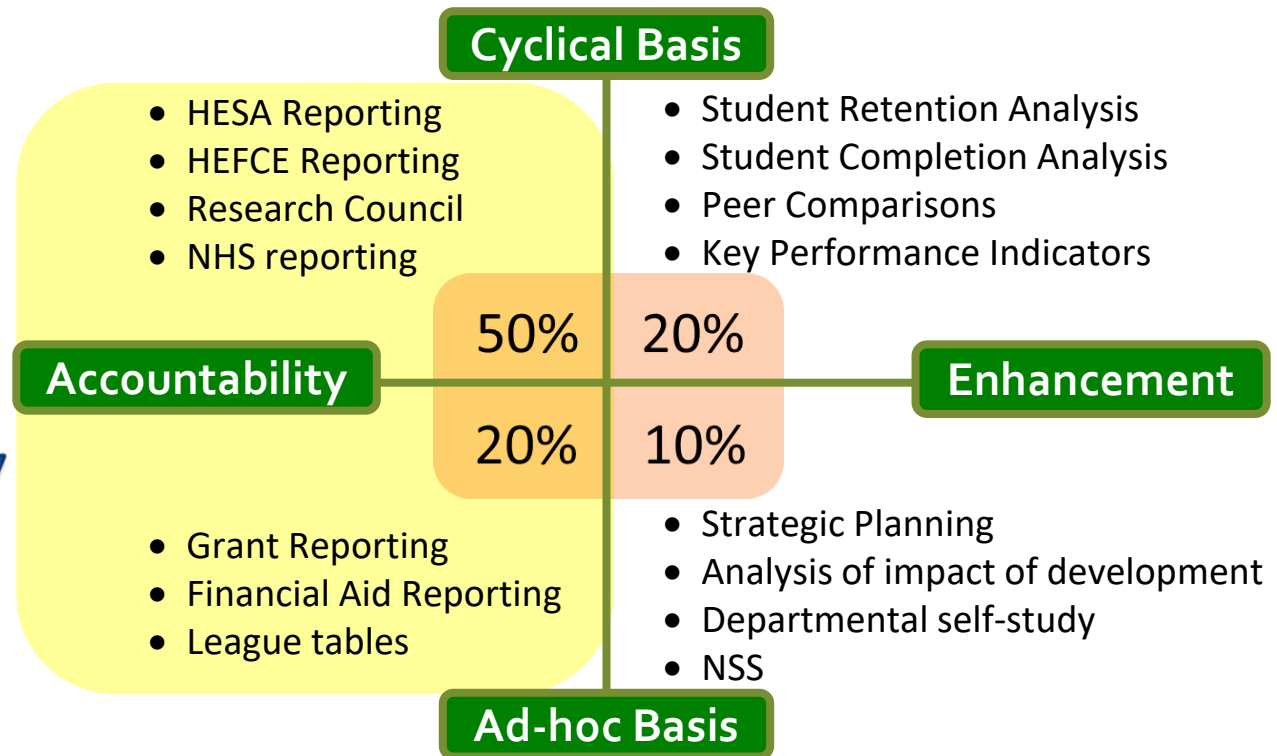What kind of organizational structure is beneficial?

Staffing
What is an adequate level of staffing?

Discussion Questions on *Efficiency*

Automation

Which project can be further automated?

Cyclical Basis

- HESA Reporting
- HEFCE Reporting
- Research Council
- NHS reporting

- Student Retention Analysis
- Student Completion Analysis
- Peer Comparisons
- Key Performance Indicators

Accountability

50% | 20%

20% | 10%

Enhancement

- Grant Reporting
- Financial Aid Reporting
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- NSS

Ad-hoc Basis

IT/data infrastructure

To what extent is IT support and investment necessary to further increase efficiency?

Discussion Questions on *Effectiveness*

Data Utilization
How can external accountability data be analyzed and shared with campus stakeholders?

Project Management
How can effective project management be established?

Cyclical Basis

- HESA Reporting
- HEFCE Reporting
- Research Council
- NHS reporting

- Student Retention Analysis
- Student Completion Analysis
- Peer Comparisons
- Key Performance Indicators

Accountability

50%	20%
20%	10%

Enhancement

- Grant Reporting
- Financial Aid Reporting
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- NSS

Ad-hoc Basis

Networking
How can a good relationship with campus stakeholders be built and maintained?

Group Discussion

Peer Feedback on
Office Projects and Operations

Peer Feedback

Form a small group (3-4 people) with other participants and discuss the following questions:

1. **What are your strategies to increase the** *efficiency* **of generating data and reports?**

2. **What are your strategies to increase the** *effectiveness* **of using data and reports for enhancement?**

Ground Rules for Peer Feedback

Closing

Group Reflection

Questions

a) What are some advantages and disadvantages of the four-quadrant framework?

b) How would you utilize your four-quadrant analysis in your office?

c) How could this workshop be further improved?

Related References

Knight, W.E. (2015). *Developing the integrated institutional effectiveness office*. Retrieved from www.ahee.org.

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Terkla, D. G. (Ed.) (2008). Institutional Research: More than Just *Data. New Directions for Higher Education, 141*. San Francisco: Jossey-Bass.

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