

## 'ACTION CONVERSATIONS:' REPORTING TEMPLATE

**Date, Time, and Place of Conversation:** 09/12/14, 12:00, THMA 303

**Duration of the Conversation:** 1 hour

**Convener:** Judy Hennessy, Mike Spiess, Mike Schilling

**Moderator:** Mike Spiess

**Reporter:** Amanda Muller

**Number of Participants:** 8

**Type of Participants:** Various staff, faculty, and management from several divisions

### Theme # 6: Organizational Process Improvement

The major ideas / proposed actions / implementation steps/ assessment of priorities emerging from this conversation are:

Two themes emerged from this conversation: Data needs and forms.

#### Data Needs

A brief update was presented on the current project to update the data warehouse. Insight will not be available next year as it will not be supported.

- We need to become a more data driven campus.
- Data needs vary by department/college.
- We need to determine what data we need and specific definitions of that data (ex. FTES, census vs. live) so we understand what is being reported. Current Wiki for Insight reports was an attempt, but is not maintained.
- Many reports are designed for the Chancellor's office, we need reports that focus our data needs. CO reports are confusing as they group data differently.
- Time should be spent interpreting the data not finding it and formatting it.
- Data commonly exists but cannot be easily found. The chairs data dashboard is an attempt to help this problem, but just a first step.
- Need a predictive analysis tool for forecasting (new and continuing students) that can be used for program planning and scheduling
- Sac State data reports were mentioned. See:  
<http://www.csus.edu/oir/Data%20Center/Department%20Fact%20Book/Departmental%20Fact>

[%20Book.html](#) In this regard data should be generated prior to the request (ex. Hiring template).

- We need to connecting the people who have the need with the people who have access to the specific data being requested
- The need for standardized reporting for common functions so we all look at the same data.

## Forms

- Forms are often generated outside the division.
- Forms may be driven by an outside mandate (eg. CO or audit)
- We need to examine who actually needs to sign and if a wet signature is required.
- Paper forms are not part of a sustainable campus
- There is a process to determine needs to sign.
- IRES is looking at document systems.
- Are there short term solutions like PDF?
- What can we do in AA in this regard?

While no specific actions were discussed many needs were developed and from these the moderator would propose two goals for discussion at future meetings:

Develop data reporting that supports AA business practices that is accessible and focused on decision making.

Convert forms in AA to standardized electronic format with minimum workflow and eliminate wet signatures when possible.