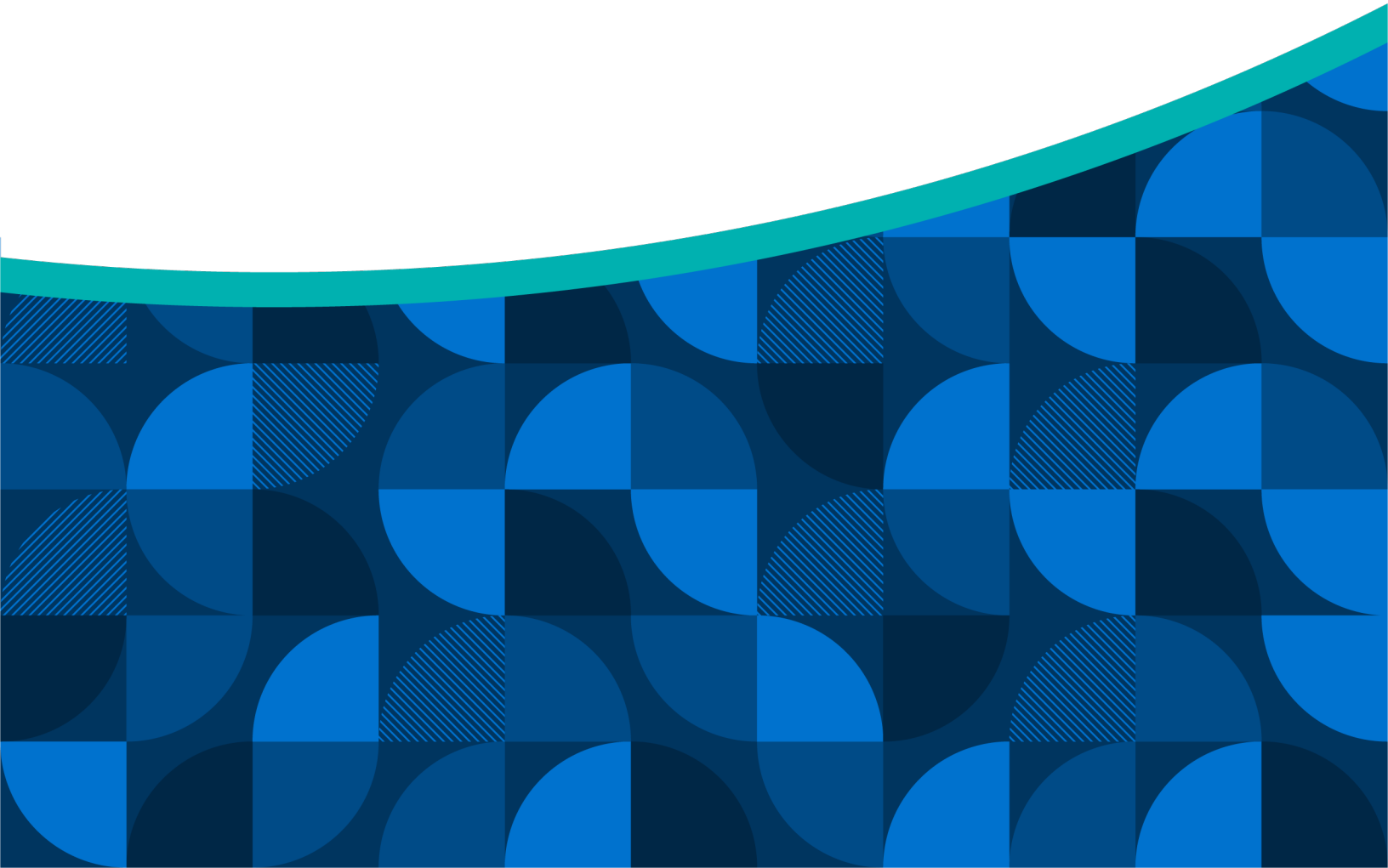# EAB

Enterprise Data Strategy Self-Assessment

Assess Your Institution's Current State and Identify Your Data Strategy Priorities

How to Use This Resource

What is the purpose of the self-assessment?

This Enterprise Data Strategy Self-Assessment helps institutions evaluate the current state of enterprise data management on campus and surface strengths and opportunities in their data strategy.

Who should take the self-assessment?

Institutional leaders who are responsible for the management of data across its lifecycle. EAB recommends that the Chief Information Officer, Data Warehouse Lead, and Data Reporting Lead all complete the self-assessment.

What happens after we take the self-assessment?

Once completed, leaders should discuss self-assessment results with one another to inform data strategy priorities. By comparing results, leaders also arrive on a single informed position of data management maturity on campus. Discussing how perception of maturity differs forces this alignment among leaders. An EAB expert can also help facilitate this discussion.

Looking for more resources to develop your enterprise data strategy?

See EAB's Enterprise Data Strategy Toolkit—filled with templates, guiding questions, and examples—to help refine your data strategy's vision and scope; principles; and governance structures, roles, and responsibilities.

Assessment: Data Strategy Elements on Your Campus

Understanding Your Institution's Current Data Strategy Practices

Data Vision and Scope

Data Vision and Goals

We have a formal data plan which articulates the steps to be taken to better leverage data and names those responsible for executing those steps.

Score:_____

Campus leaders have articulated the specific benefits (e.g., student success, financial efficiency) they hope to achieve by investing in data analytics.

Score:_____

Subtotal:

Attitude Towards Data and Analytics

Stakeholders regularly use institutional data appropriately to guide decisions and discussions

Score:_____

Leaders promote a culture of data informed decision-making, encouraging leaders to base resource decisions on fact, not intuition.

Score:_____

Subtotal:

Data Principles

Security and Accessibility

We have clear security protocols regarding data storage, access, sharing, classifications, etc. which are well understood and uniformly applied.

Score:_____

Our institution grants data access on a principled, (semi-)automated basis.

Score:_____

Subtotal:

Accuracy and Value

We actively monitor for anomalous data in enterprise systems and take steps to identify and remediate the underlying causes.

Score:_____

Stakeholders regard institutional data as an institutional asset owned by the institution, not by individuals or departments.

Score:_____

Subtotal:

Ethics and Use

We have clear expectations around what constitutes appropriate/ethical uses of data. We provide examples and explanations of ethical considerations in data use.

Score:_____

We have processes to ensure that whenever data is used for a particular purpose, the right data for that purpose is used.

Score:_____

Subtotal:

Data Consistency and Literacy

We are able to use data from different systems and sources seamlessly because the data has been standardized and is accessible in a way to allow for this.

Score:_____

We create and regularly update clear, institution-wide definitions for commonly used terms (e.g., "student") and stakeholders understand data definitions and limitations.

Score:_____

Subtotal:

Source: EAB Interviews and analysis

Assessment: Data Strategy Elements on Your Campus

Understanding Your Institution's Current Data Strategy Practices

Governance Structures, Roles, and Responsibilities

Data Governance Leadership

A designated individual(s) oversees data governance and management, working in tandem with unit-level data stewards.

Score:_____

We distinguish between strategic and operational data issues. People have the appropriate seniority and expertise for the data governance activities they are tasked with.

Score:_____

Subtotal: [   ]

Policy-Making and Coordination

We have effective mechanisms for setting and reviewing data policies and adjudicating cross-unit data stewardship issues (e.g., who is responsible for granting access).

Score:_____

Campus stakeholders know that we have data policies and can easily refer to them as needed.

Score:_____

Subtotal: [   ]

Data Vision and Scope: [   ]

Data Principles: [   ]

Governance Structures, Roles, and Responsibilities: [   ]

Grand Total [   ]

16-30 – Stuck at the Starting Gate
Your institution is sitting pretty—pretty behind the times. As the world of higher ed marches steadfastly into the data revolution, you're still fixing desktops and pestering the ankles of those sitting at the table. Time for the journey to begin.

31-45 – Barely Begun
You're starting to make headway. Maybe you're evangelizing and people are starting to take notice. But there's no coherent plan, and no one is taking steps toward an enterprise-wide data-asset revolution. You need more guidance and guardrails, but at least you're on your way.

46-60 - Gathering Steam
You've got your committees and stewards; you've got a plan. Someone's leading the charge and people are plodding along—but mostly at higher ed's typically glacial pace. Although you've got the right folks beginning to line up—you just need the right approaches and structure to push them over the line.

61-75 - Leading the Pack
When it comes to data initiatives, you're ahead of the curve. You've got standards and documentation, stewards and evangelists. Your data is inflecting decisions and the institution is deriving strategic value from your hard work.

75-80 - I-for-Innovation
What data problem in higher education? Your university is humming with the excitement of seamless data flows careering through the institutional ether. Data-driven decision-making feeds off clean, secure data, and silos are a thing of the past. "Student success" and "Institutional Efficiency" have replaced traditional business concerns, and you're making real headway against strategic goals. Well done you, Data Hero.

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Mapping the Current State

Obstacles and Opportunities in Current Data Management Efforts

What are the major data management challenges we currently face?

_____

_____

What mitigation strategies might help us overcome the obstacles that have limited our progress on improving data management?

_____

_____

What areas of strength have we demonstrated in our efforts to kickstart data management mapping?

_____

_____

Data User Experience Issues
What problems do we currently encounter that are caused by poor data practices (e.g., access, trust, accuracy, lack of use)?

_____

_____

_____

Ideal Data User Experience
Considering the above issues, what are the most pressing reasons to create a more data-enabled culture?

_____

_____

_____

Data Availability and Integrity Issues
What problems show up in our processes and productivity due to poor data practices (e.g., access, trust, accuracy, lack of use)?

_____

_____

_____

Ideal Data Availability and Integrity
Considering the above issues, what are the analytics process imperatives for a more data-enabled campus?

_____

_____

_____

ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.