EAB

Guide Your Campus with Trustworthy, Unified Data

2024 Higher Ed Data & Analytics Case Study Compendium

Transform Decisions with Better Data

Amid growing pressures in higher education, data-informed decisions are more important than ever before. But data is often siloed in systems that do not communicate with each other, hampering reliability and stalling decisions. Without trustworthy data, critical questions go unanswered and progress toward institutional priorities is impeded.

A Fractured Data Environment Leads to Indecision and Delay

Architecture by Accident Leaves Data Inaccessible and Stalls Decisions
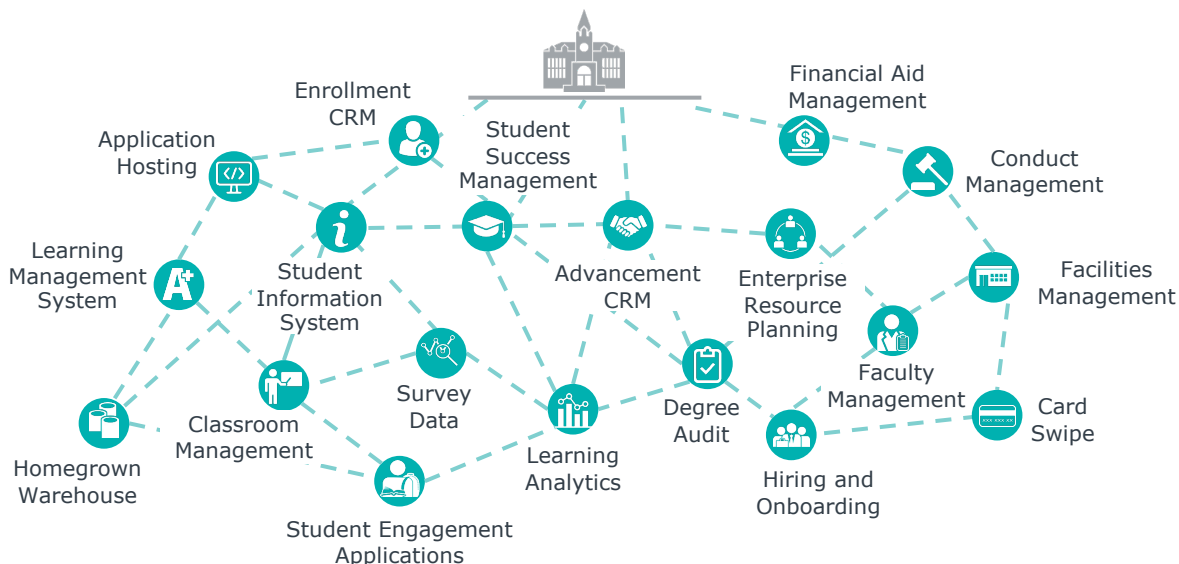
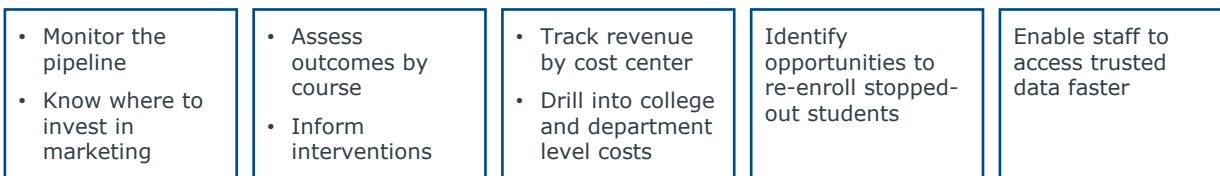|		
Doubt and delay lead to indecision	Out-of-date information risks costly missteps	Disconnected data puts AI innovation out of reach

Navigate the New Normal with Reliable Data

EAB's Data and Analytics Technologies Help You Bring Your Data Together To Meet Key Imperatives

Imperatives for the next decade

Understand enrollment shifts	Support student readiness	Find sustainable business models	Deliver a return on education	Prepare for AI adoption

What you need from your data

|				
• Monitor the pipeline • Know where to invest in marketing	• Assess outcomes by course • Inform interventions	• Track revenue by cost center • Drill into college and department level costs	Identify opportunities to re-enroll stopped-out students	Enable staff to access trusted data faster

In this compendium, you'll find stories of how our partners are using EAB's data and analytics technologies to unite data, activate insight, and achieve goals in enrollment, revenue, student success, and more.

Read the stories ▶

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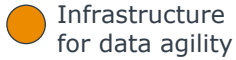
🟠 Infrastructure for data agility   ⚫ Culture of data confidence   🔵 Enrollment and revenue growth   🟢 Student success and experience   ⚪ The academy and fiscal resilience

Edify: A Data & Analytics Solution Designed for Higher Ed

Rapid Insight: Self-Service Analytics Technology

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EAB's Edify Allows Oregon Tech to Reallocate IT Spend Toward Student-Centric Initiatives

Oregon Institute of Technology

This case study discusses

🔵 Student success and experience

🟠 Infrastructure for data agility

- **About:** Oregon Institute of Technology (Oregon Tech) is a small public university in Klamath Falls, OR. Oregon Tech enrolls 5,325 students at multiple campuses throughout the Pacific Northwest.

- **Challenge:** Oregon Tech's administrative technology portfolio cost significant money and IT staff time to maintain and contributed to poor data accessibility. The institution is leanly staffed as a means of managing costs, so technology maintenance represented a significant burden. Frustrated with their reliance on a few monolithic platforms, Oregon Tech sought a solution that allowed for a more modular ecosystem with greater data accessibility and the ability to optimize data quality while minimizing maintenance needs.

- **Solution:** The school partnered with Edify, EAB's Education Data Platform in spring 2020. Putting Edify at the center of their digital enterprise has allowed Oregon Tech to choose the best-fit, best-cost solutions for campus without being beholden to a single vendor.

- **Impact:** By shifting away from a single-vendor model, Oregon Tech can recapture and reallocate millions of dollars in IT spend toward high-priority student success initiatives across multiple years of partnership.

Impact Highlights

$115,000

Year-one savings from using Edify to support Enterprise Resource Planning (ERP) system replacements—all reallocated to high-priority student success initiatives

30%

Reduction in spend on annual maintenance of HR and Payroll solutions

Before Edify: Oregon Tech's Technology Ecosystem Revolved Around a Vendor

Monolithic Technologies Escalate in Cost as Their Value Degrades

Single Vendor Solution
- Payroll
- Hiring and HR
- Student Information System

Other Systems

Enrollment CRM

Learning Management System

Oregon Tech's legacy Enterprise Resource Planning (ERP) system provided Payroll, HR, and Student Information System (SIS) functionality in one consolidated platform.

For HR and Payroll alone, system maintenance required:

- **$50k+** in annual software licenses
- **$250k+** in staffing costs across IT and business units

Why do some legacy technologies pose such a burden?

❌ Platform updates **eliminate or hinder essential functions**

❌ Outdated tech is **unreliable and difficult to integrate** with newer, better applications

❌ **Degrading performance** contributes to increasing need for IT support

With Edify: Hub-and-Spoke Integration Offers Vendor Flexibility

Oregon Tech Unlocks Ecosystem Agility with Investments in Campus-Focused Data Management

With best-in-class technologies replacing single-vendor solutions, Oregon Tech creates vendor optionality.

Individual systems are connected to Edify and then to each other, so that when one system is replaced, it doesn't break connections to other systems.

Hiring and HR

Student Information System

Enrollment CRM

Oregon TECH

Oregon Tech's Edify Platform

Payroll

Learning Management System

Edify Is an Education Data Platform to Unify Data and Accelerate Strategic Initiatives

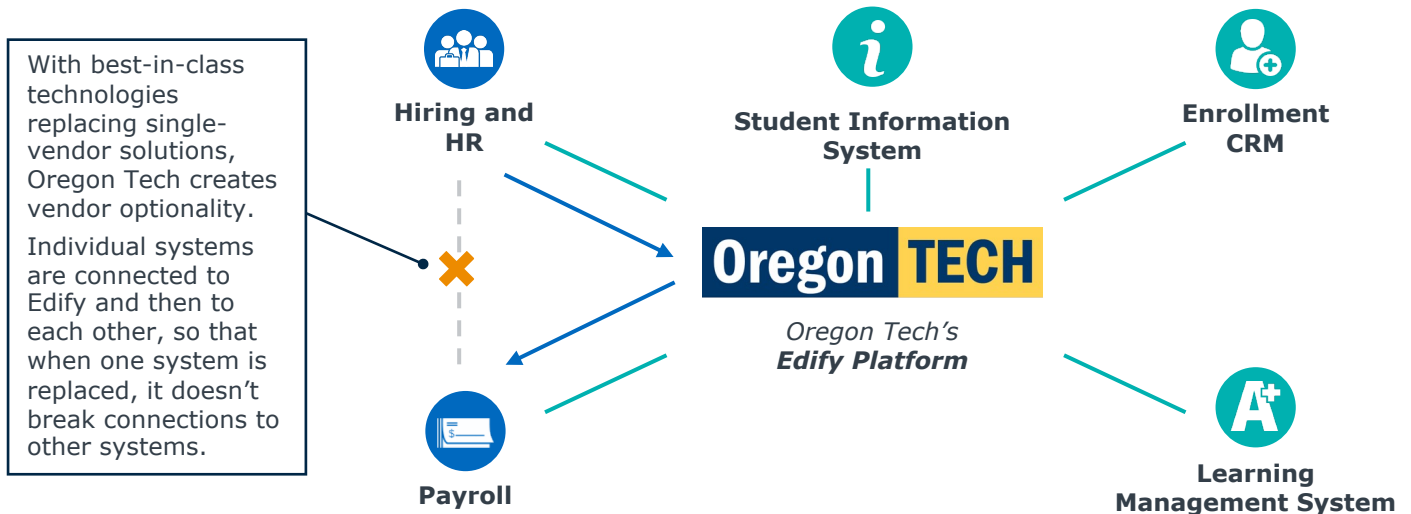✓ **Integrate** new and existing technologies more quickly, streamline data processes

✓ **Report** with consistent and validated data, aggregated from cross-campus sources

✓ **Innovate** with next-generation tooling that keeps campus current with best practice

Oregon Tech Reallocates IT Spend to Student-Centric Technology Initiatives

Dismantling the ERP Pays Dividends for Campus Transformation

Doing More for the Mission

Breakdown of Annual Technology Spend by Institutional Category to FY26

Legend: ▢ SIS ■ HR/Payroll ■ New Student Technology

	Before	Today	Future*
New Student Technology		$115,000	$322,000
HR/Payroll	$400,000	$285,000	$285,000
SIS	$507,000	$507,000	$300,000
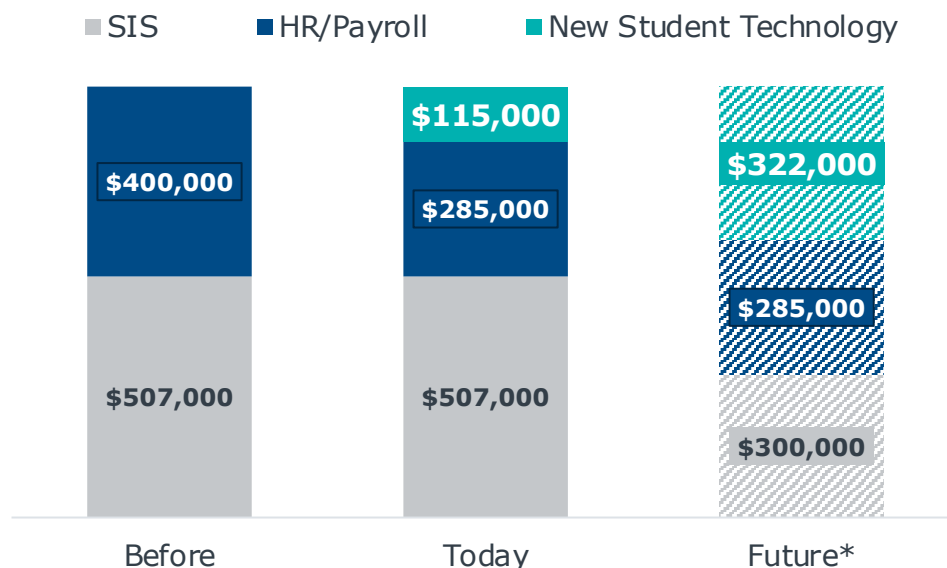
> "Our goal is to reduce the cost of our administrative technology and maintenance. We want to **spend those dollars on software that supports our students** and differentiates the Oregon Tech experience."
>
> -Connie Atchley, CIO

$750K+

Anticipated IT spend reallocations over the next five years of the Edify partnership

* Future costs assume ~$300k annual savings through anticipated Student Information System Migration in FY25.

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How Northampton Community College Simplified Compliance Reporting with Automated Data Prep

Northampton Community College

This case study discusses	🟠	Infrastructure for data agility	⚫	Culture of data confidence

About: Northampton Community College is a public two-year college serving 20,000+ students across three campuses in Pennsylvania. Sixty-five percent of their students are first-generation, and ninety-six percent of recent graduates are employed or continuing their education.

Challenge: Northampton struggled to meet annual compliance reporting requirements due to an ineffective data management process. It took weeks to complete each reporting cycle, and they often missed deadlines and requirements.

Solution: In summer 2022, Northampton partnered with Edify, EAB's education data and analytics solution, to automate their compliance reporting process by creating saved, repeatable workflows that mirrored both IPEDS and state report structures. Northampton's IE staff were then able to easily run their reports, check for errors, and submit them on time.

Impact: With ongoing support from EAB's professional services team, they saved hundreds of hours and expect to save even more in future cycles. With automated, repeatable workflows in place, they will be able to pull future reports, validate the data, and submit both state and federal reports in less than a day. Automating a necessary process like compliance reporting has freed them up to focus on projects supporting their primary data goal: to create a culture of data confidence across the institution.

Impact Highlights

$950K

State funding loss avoided in only one day thanks to Edify and support from the EAB data team

Hundreds

of staff hours saved, now and in future reporting periods, freeing Northampton up to focus on broader data strategy and integration goals

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Northampton's New Process with Edify Saves Valuable Staff Time

Edify Automates Data Preparation, Making It Easy to Hit Reporting Deadlines

Compliance Reporting Before Edify

- ❌ Process involved **multiple departments** pulling complex reports from **disparate systems**

- ❌ 1-2 staff responsible for reporting due to **staffing shortages**

- ❌ Reports were often **PDFs** that **couldn't be combined** and required **labor-intensive** analysis and aggregation

- ❌ Multiple interpretations of requirements created **confusion, redundancies**

After Edify

- ✅ EAB's Edify team brought Northampton's **SIS data** (Workday Student) into Edify in raw form, where it was **transformed, cleansed,** and **validated.**

- ✅ The Edify team partnered with Northampton to create **workflows** that **mirrored federal and state reporting requirements.**

- ✅ Northampton used the workflows to run needed reports, which were **ready for validation within hours.**

- ✅ Northampton's IE team could easily **identify and correct report errors** by using Edify's back-end raw data view.

- ✅ Northampton's reports were **submitted on time.** The **reports were saved** for the next reporting period and will only need to be updated if there are requirement changes.

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Quick and Quantifiable Wins with Edify

Success Is Built on a Strong Data Solution Paired with Ongoing Professional Support

Northampton saw tangible results with Edify in a matter of days—and in some cases as little as one day—saving them hundreds of staff hours and nearly a million dollars in potential state funding loss. But it was more than solid tech that helped them achieve their goals. With support from EAB's professional services team, they were able to expand the capacity of their team and make meaningful progress in the first three months after deployment.

Early Successes with Edify and EAB Professional Services

Hundreds	$950K	On Time	Under Budget	Expanded Capacity
of **staff hours saved,** now and in future reporting periods	State **funding loss avoided** with Edify and support from EAB's professional services team	**Both** state and IPEDS **reports submitted** in the first full reporting period with Edify (Fall 2022)	Edify deliverables provided **ahead of schedule,** saving money	EAB's professional services team helps Northampton staff **work more efficiently** amid staff shortages

What's Next for Northampton with Edify

Northampton Has Time to Think Bigger Now That Compliance Reporting Challenges Are Solved

By automating the time-consuming compliance reporting process, Northampton has freed themselves up to set their sights on more strategic data management goals. They've already completed a data strategy alignment project with their EAB Strategic Leader and will now move into execution of much larger goals, ultimately helping them create an institution-wide culture of data confidence.

Integrate Starfish data into Edify and stand up Retention Scores tool

Purpose: Drive student success strategy and leverage underutilized retention tool

Enable self-service access to data

Purpose: Empower users across campus to pull the data they need by creating customizable dashboards

1 **2** **Create a Culture of Data Confidence** **4** **3**

Incorporate National Student Clearinghouse data into Edify

Purpose: Use data to understand Northampton transfer student trends and inflect change and growth

Bring LMS and CRM data into Edify

Purpose: Unify all student data to better support and track the student experience

> "It's really about the partnership. It's a whole team. A lot of companies have that standard customer success manager model, but EAB does it differently. Our strategic leader and technical project manager are always there asking, *'Are we meeting your goals at a strategic level? Are we meeting what we promised we would do for you?'"*
>
> *Brian Gardner, Chief Information Officer*
> *Northampton Community College*

Democratized Data Access Accelerates Analytics Efforts and Improves IR's Campus Relationships

Utah Tech University

This case study discusses ● Infrastructure for data agility   ● Culture of data confidence

- **About:** Utah Tech University (UTU) is a midsize public open-enrollment university in St. George, Utah, with over 11,000 students, three-quarters of whom are from Utah. At UTU, 84% of students receive scholarships, grants, or other financial aid, and 85% of graduates are employed upon graduation.

- **Challenge:** Before their partnership with EAB, institutional research at UTU was largely compliance-driven. Data management and governance were siloed, leading to inconsistent data accuracy and widespread frustration. UTU set out to become more data-informed, appointing a new cabinet-level Executive Director of Institutional Effectiveness position to build a high-performance analytics organization.

- **Solution:** UTU partnered with EAB to implement Edify, an education data platform that organizes data and facilitates access to reliable information. In addition to implementing the Edify platform on campus, the IE team also implemented data governance best practices with EAB's guidance, building the culture and technical infrastructure to support data-informed decisions.

- **Impact:** UTU's data now flows through Edify, and analysts leverage the Edify data model to build new analyses. By connecting Edify to Tableau and RStudio, the IE team is growing UTU's analytical capacity, shifting from an environment of snapshots and manually updated data to interactive visualizations and analyses that can automatically update as data is refreshed.

Impact Highlight

30x

Faster to build Tableau dashboards from Edify, compared to reliance on underlying Banner system

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Existing Data Efforts Fall Short

Ineffective Processes Lead to Inconsistent Data and Widespread Frustration

✖ Limited Data Access

Data teams encounter difficulties when trying to extract data out of complex campus systems

"What is SFRSTCR?"

✖ Limited Data Governance

Ineffective business processes lead to data of varying quality being entered into systems

"Those aren't my numbers…"

✖ Limited Resources

UTU doesn't have the staff or budget to build new data systems themselves

Data teams' increased responsibilities contribute to a backlog of requests

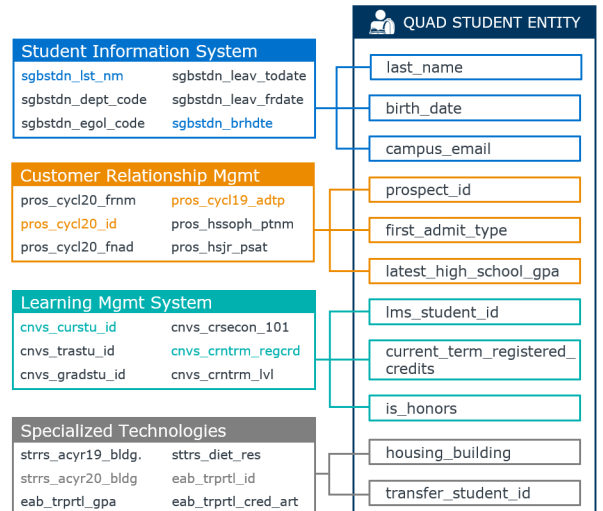*"It took a year to get that report!"*

Pursuing a Better Way

Utah Tech's president created a cabinet-level position for institutional effectiveness to guide the University's transformation into a data-informed organization.

Creating an Accessible and Trusted Data Set

In addition to creating a central data repository, UTU recognized that to truly improve data use across campus, they also needed to make data more accessible to end-users.

Using Edify's data model, UTU aggregates data points from across their siloed environments and translates them into common-language definitions, markedly reducing the need for joins across multiple tables or systems.

Paramount to UTU's data transformation initiative is the ability to visualize, analyze, and act on their data. Edify delivers the data to a cloud-based PostgreSQL database connected to Tableau and RStudio, UTU's tools of choice for statistical modeling and visualization. This allows Institutional Effectiveness to provide easily interpretable visualizations for the broader campus community, as well as tabular data for deeper analysis.

QUAD STUDENT ENTITY

Student Information System

sgbstdn_lst_nm	sgbstdn_leav_todate
sgbstdn_dept_code	sgbstdn_leav_frdate
sgbstdn_egol_code	sgbstdn_brhdte

Customer Relationship Mgmt

pros_cycl20_frnm	pros_cycl19_adtp
pros_cycl20_id	pros_hssoph_ptnm
pros_cycl20_fnad	pros_hsjr_psat

Learning Mgmt System

cnvs_curstu_id	cnvs_crsecon_101
cnvs_trastu_id	cnvs_crntrm_regcrd
cnvs_gradstu_id	cnvs_crntrm_lvl

Specialized Technologies

strrs_acyr19_bldg.	sttrs_diet_res
strrs_acyr20_bldg	eab_trprtl_id
eab_trprtl_gpa	eab_trprtl_cred_art

- last_name
- birth_date
- campus_email
- prospect_id
- first_admit_type
- latest_high_school_gpa
- lms_student_id
- current_term_registered_credits
- is_honors
- housing_building
- transfer_student_id

Powering Flexible Visualization and Analytic Capabilities with Edify

Analysts Deliver Trusted Data and Partner with Decision-Makers Across Campus

By drawing from Edify's model, UTU's Office of Institutional Effectiveness has shifted their time spend away from discovering and validating data and toward partnering with campus leaders to build effective dashboards that communicate key metrics for institutional decision-makers. Rather than being paralyzed by possibility with no clear way to connect the dots across student data, analysts are empowered to iterate on metrics and visualizations directly with campus stakeholders, and dashboard creation timelines have been reduced drastically.

UTU's "Big Three" Dashboards, with Data Verified Through Edify

▶ *Enrollment Trends*   ▶ *Student Success & Retention*   ▶ *Graduation Trends*

30x

Faster to build Tableau dashboards from Edify, compared to reliance on underlying Banner system

"
Our DEI leader saw this dashboard in progress, and she was able to see the value immediately—and when she wanted to add veteran filters, it was the work of a few moments through Edify."

-Joy Baule,
Sr. Strategic Data Analyst

How Utah Tech Uses Edify to Improve the Effectiveness of Student Success Initiatives

Utah Tech University

This case study discusses	⬤	Student success and experience	⬤ Culture of data confidence

ABOUT

Utah Tech University (UT) is an open access public university in St. George, Utah with 12,556 students and a 36% six-year grad rate.

KEY RESULTS

▶ **4 percentage-point increase in fall-to-fall retention** across five years

▶ **63% IPEDS Retention Rate,** increase from 59%

▶ **Saved significant staff time** by centralizing key information and data in one place

▶ **Improved the efficacy** of various student success efforts

OPPORTUNITY

UT wanted to measure the impact of their intervention and student engagement efforts on retention and completion.

UT ran various student success initiatives to improve the first-year experience, including enrollment campaigns in Navigate360, EAB's higher education CRM. UT sought a custom solution to measure the impact of these efforts, consolidate data, and improve processes.

SOLUTION

UT's Institutional Effectiveness and Student Success Teams collaborated using EAB's Edify.

Edify, EAB's higher ed data and analytics solution, provides a central hub for disparate data from across campus. UT used Edify's data model to consolidate data and improve data access and governance. Their Institutional Effectiveness (IE) and Student Success Teams meet weekly, creating an effective feedback loop as they use Edify to evaluate the impacts of student success efforts, analyze changes in outcomes, and adjust future initiatives.

IMPACT

The combined power of Edify and Navigate360 elevates student success work across campus.

Through UT's work with both platforms, they have achieved a fuller picture of the impact of student success initiatives and identified improvement opportunities in several key areas, including enrollment campaigns, first-year engagement, student communications, and holds.
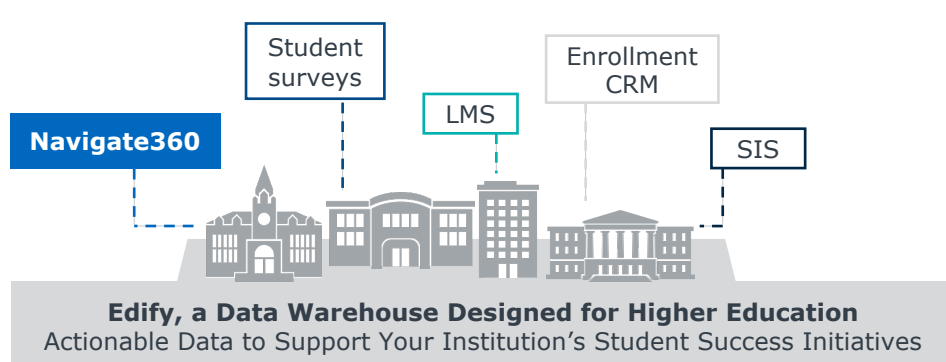
Bringing Data Together to Understand and Serve Students

Edify and Navigate360 Provide an Actionable, Holistic View of the Student Experience

The combined power of Edify and Navigate360 allows UT's Student Success and Institutional Effectiveness Teams to operate more efficiently and impactfully. Data from Navigate360 and other campus systems feed into Edify, providing UT with a holistic picture of student engagement on campus.

Navigate360 · Student surveys · LMS · Enrollment CRM · SIS

Edify, a Data Warehouse Designed for Higher Education
Actionable Data to Support Your Institution's Student Success Initiatives

➡ **Report** with consistent and validated data in **Edify**, aggregated from cross-campus sources

➡ **Intervene** with custom and collaborative workflows in **Navigate360** to support student retention and success

Combining UT's Institutional Effectiveness and Student Success Teams

Four Goals Edify and Navigate360 Support to Improve Student Enrollment and Retention

Measure the impact of enrollment campaigns on registration

NAVIGATE360 | EDIFY

1 IE worked with UT's EAB team to build daily enrollment tables

2 Advisors conducted outreach campaigns encouraging students to re-enroll

3 Student Success leadership monitored daily enrollment tables powered by Edify data

4 Advisors leveraged insights gleaned from the enrollment tables to iterate on their campaign strategy

Outcome: Improved the efficacy of enrollment campaigns

Track attendance and communicate with students

NAVIGATE360 | EDIFY

1 IE identified students from high-need populations, such as athletes and transfers, for outreach

2 Faculty tracked course attendance

3 IE used attendance information and student responses to obtain an accurate headcount before the census date

4 Advisors reached out to students from high-need populations who missed classes

Future Strategy: Build an engagement index based on attendance and activities

Outcome: Guided student experience and ensured students avoid unnecessary coursework

Advise First-Year Students

NAVIGATE360 | EDIFY

1

Outside of Navigate360: Student Success ran intake survey on students' academic goals, history, and preferences

2 IE consolidates intake survey responses, placement test scores, and course requirements

3 *Outside of Edify:* Advisors used consolidated info from Edify to create suggested course schedules for first-year students

4 Advisors communicate with students about their schedules

5 Students schedule advising appointments to finalize schedules before registering

Outcome: Improved retention by 4-5% and saved staff time

Centralize Holds Data

Before: Different users used inconsistent processes to pull holds data from disconnected sources

Now: EAB worked with UT to build a custom Edify Dashboard with all relevant holds information, including type and number across student populations—revealing surprising insights on the pervasiveness of holds

Future Strategy: Leverage the insights provided by the Edify Holds Dashboard to improve transparency for both senior leadership and the students themselves

Outcome: Increased visibility of holds prevalence; working to reduce holds overall

UT's Continuous Data Journey with Edify and Navigate360

UT Shifts From Identifying Problems to Proactively Addressing Them

UT's work with Edify and Navigate360 exemplifies how student success benefits from university-wide buy-in on data access and governance efforts. Going forward, UT is shifting from just reacting to problems to actively preparing for and predicting them by further integrating data, automating processes, and continuing to close the communication loop between their Institutional Effectiveness (IE), Student Success, and Leadership Teams.

Goal	How Edify and Navigate360 Make It Happen	Sample Use Case
Integrate data sources to build predictive models	IE uses Edify to centralize data on LMS usage, campus event attendance, tutoring lab and study room utilization, advisor appointments, early alerts, and more to **inform UT's predictive model and empower data-informed decision making**	IE predicts enrollment numbers for a future course so academic leadership can plan to hire more tutors for the respective tutoring center
Prepare reliable data for AI	IE feeds reliable data from various sources, including Navigate360, into Edify to ensure any **campus AI tools are built on reliable information**	UT provides students with trustworthy AI Bot interactions
Continue to close communication loop with Edify and Navigate360	IE and Student Success Teams analyze collected data, communicate with students, and automate processes using Edify and Navigate360 together. Their data infrastructure serves as a **rich, passive data source for stronger predictive modelling and more informed and timely interventions**	Data-informed Student Success Team communicates seamlessly with students who may be disengaged

" Marrying your data team and your student success team is a fantastic idea. And tying together the technology that those two teams utilize is another great idea. For us, that's Navigate360 and Edify. We've had huge success in tying those two products together.

- Matt Nickodemus, Executive Director of Institutional Effectiveness, Utah Tech University "

Custom Data Workspaces with Edify

Edify's higher education data experts offer a wide variety of data services and custom workspaces focused on each institution's needs. EAB experts worked with UT to build custom Dashboards and reports in Edify tailored to their unique challenges and strategic goals, allowing them to:

➡ Compare the number of student credit hours by full- and part-time faculty with the **Instruction Dashboard**

➡ Compare attempted credit hours of majors and non-majors taking specific courses in the **Department Dashboard**

➡ Compare year-over-year changes in enrollment by major with the **Enrollment Dashboard**

➡ Centralize data related to different types of holds to identify opportunities for process improvement with the **Holds Dashboard**

Customize your institution's insights.
Schedule a demo at https://eab.com/edify.

Embedding Data in Review Process to Improve Resource Allocation

St. Ambrose University

This case study discusses ○ The academy and fiscal resilience ● Culture of data confidence

- **About:** St. Ambrose University (SAU) is a small private university in Davenport, IA, with a total enrollment of 2,916.
- **Challenge:** Department chairs and deans lacked accessible data to inform and measure the impact of resource allocation decisions. Existing reports included disparate data points and required extensive manual analysis.
- **Solution:** SAU used Edify to standardize all required data, then produced reports with custom data and filters for each department chair. Edify enabled SAU to use key department-level metrics to inform resource requests and make allocation decisions. Streamlined, customized reports provided the exact data department chairs needed to see, increasing decision-making efficiency.
- **Impact:** SAU's partnership with Edify has improved transparency in the resource allocation process. With easily accessible data, the labor-intensive and time-consuming process of analyzing different data points has been drastically reduced. Additionally, SAU has identified opportunities to shift resources to high-demand departments.

Impact Highlights

1,000 hours

Time saved by eliminating manual data collection and analysis

$500K

Saved by understanding which positions needed to be replaced after a retirement incentive was offered

Streamlining Department Review Process with Standardized Data

In previous years, SAU's Faculty Finance Committee (FFC) reviewed data for a few select departments. Using Edify, the finance team was able to create department-level reports to measure the health of all departments. With access to operational and financial metrics, department chairs understood how their operational decisions impacted their financial results. The reports analyzed 40 departments and used 18 metrics for a comprehensive but streamlined view of critical metrics.

Edify Analyses Used to Create Departmental Reports

Enrollment Trends

- How many majors are enrolled in my department's courses?
- How have attempted student credit hours changed over time?
- What is the trend in student credit hours over the past five years?
- Are student credit hours taught to majors, or is this primarily a service department?

Section Size and Utilization

- How full are classes?
- Can we offer courses less often?
- What are the median sizes of classes, and how has that changed over the past five years?
- How do median section sizes compare to benchmark schools?

Faculty Mix and Workload

- How many courses are instructors teaching? Has this changed over time?
- What percentage of sections, credit hours, and student credit hours are taught by full-time faculty?
- How do workload levels compare to benchmark institutions?

Costs

- What is the current distribution of costs in my department?
- How does this compare to my peers?

Class Size

- How many sections are under ten students?
- Is there a need to have small class sizes?
- Are there sections with low fill rates? Can these courses be offered less often?

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Surfacing Resource Reallocation Opportunities Across Departments

Leveraging the reports generated for each department, the FFC was able to engage in data-supported conversations with deans, chairs, and faculty. Together, they reviewed the reports to identify insights and opportunities.

Faculty Finance Committee Meetings

Reviewed reports with academic stakeholders

- Used departmental reports to facilitate discussions about current use of resources
- Asked targeted questions to illuminate existing efficiencies and potential opportunities

✓ Improved transparency and standardized process

Department Chair Buy-In and Agreement

Used reports to understand departmental performance and resource use

- Achieved consensus about which departments to prioritize for resources

Opportunities Illuminated Through Updated Review Process

Maximum Capacity
Accurately document maximum capacity to correctly measure fill rates and instructional capacity

Intercurricular Dependency
Align distinct course offerings with student enrollment trends, such as in departments teaching large share of non-majors

Faculty Course Loads
Balance course loads – particularly for full-time, tenured faculty who currently teach most courses

Bottleneck Courses
Consolidate low-fill sections and reallocate resources to bottleneck courses

Impact of Engraining Data into Decision-Making

Making Data-Informed Decisions with Edify

Administrative Impact

1,000 Hours
saved by using standard reports rather than the FFC creating reports from scratch

Academic Planning Outcome

$500,000
in reallocated faculty lines saved after Edify assisted management in understanding which positions needed to be replaced

Departments Served

100%
of departments reviewed, instead of select handful of departments

Making LMS and SIS Data Accessible and User-Friendly in Record Time

El Camino College

This case study discusses ● Enrollment and revenue growth ● Infrastructure for data agility

- **About:** El Camino College (ECC) is a large public community college in Torrance, CA, with 20,400 students.

- **Challenge:** ECC wanted to create an integrated data source for Learning Management System (Canvas) and Student Information System (Colleague) data. Neither platform offered access to data in a digestible format. Conflicting and confusing coding systems in the LMS and SIS made it challenging for leaders to use data for strategic enrollment management and diversity, equity, inclusion, and access (DEIA) initiatives.

- **Solution:** ECC used Edify's automated higher education data model to combine and standardize data from Canvas and Colleague in only two months. Edify matches fields automatically, even if they are coded differently within and between systems and platforms. EAB's data experts used ECC's standardized data to produce dashboards that allow decision-makers to view and act quickly on trustworthy SIS and LMS data to examine enrollment and registration metrics.

- **Impact:** ECC now has access to a unified student record based on clean, reliable data. With standardized, governed data from Colleague and Canvas available in a single location, decision-makers can consult rich dashboards to investigate registration trends, credits, and LMS usage metrics.

- **Future Impact:** ECC plans to integrate data from their CRM and their Starfish Student Success Platform, creating a more holistic and accessible data model.

> ### Impact Highlights
>
> ## 2
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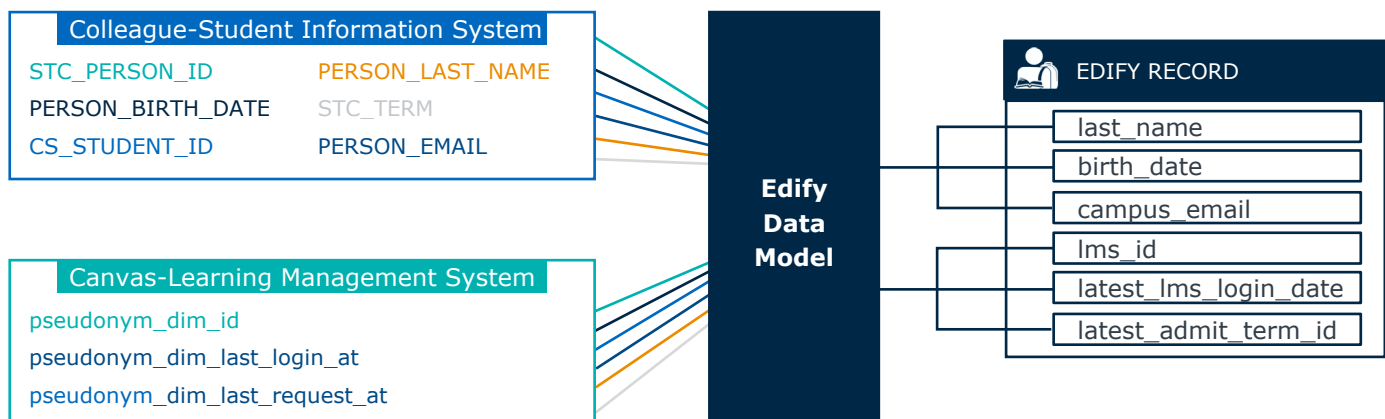> Months from project initiation to implementation
>
> "
>
> Edify is transforming how we look at data and will provide us with the Strategic Enrollment Management and DEIA dashboards we need to **solve our biggest challenges.**"
>
> —*Loic Audusseau, Chief Technology Officer*

Using EAB's Edify to Merge SIS and LMS Data Automatically

Edify Standardizes Confusing, Duplicative Codes to Create a Unified, Useful Student Record

Colleague-Student Information System

STC_PERSON_ID   PERSON_LAST_NAME
PERSON_BIRTH_DATE   STC_TERM
CS_STUDENT_ID   PERSON_EMAIL

Canvas-Learning Management System

pseudonym_dim_id
pseudonym_dim_last_login_at
pseudonym_dim_last_request_at

Edify Data Model

EDIFY RECORD

last_name
birth_date
campus_email
lms_id
latest_lms_login_date
latest_admit_term_id

eab.com

Making LMS and SIS Data Accessible to Key Decision-Makers

Extract and Standardize Canvas and Colleague Data to Examine Enrollment and Registration Metrics

ECC's integrated LMS and SIS data source allows leaders to access and apply validated data for innovative decision-making. Specifically, leadership monitors LMS utilization and course performance, point-in-time summaries of course registrations, and enrollment trends.
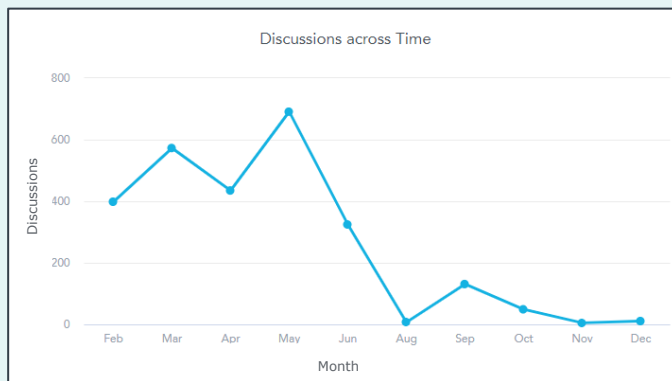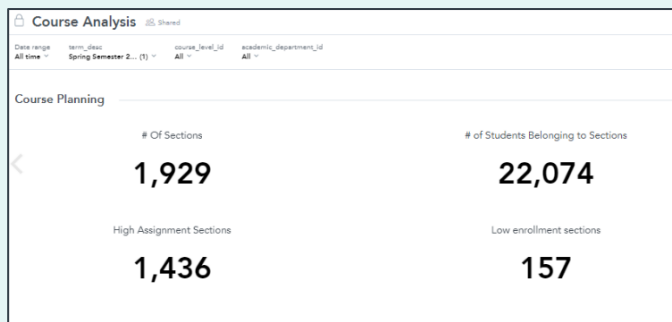
| Canvas LMS	Colleague SIS
• Course data • Activity data • Assignment grades	• Demographic data • Registration data • GPA data

EDIFY ANALYTICS

LMS Analysis Dashboards

SIS Dashboards

Key metrics available for LMS usage analytics and section consolidation decisions

○ Evaluate utilization metrics (logins, discussion entries, and student participation)

○ Track low- and high-enrollment sections

○ Track assignments by section
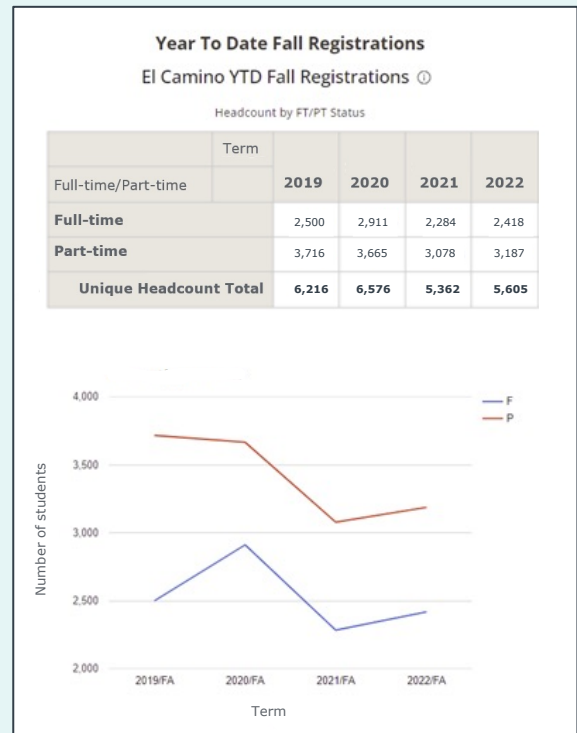
Historical SIS data unlocked for course needs analysis and registration support preparation

○ Point-in-time summary of historical course registration data

○ Registrations around key periods in the academic year

○ Current registration patterns for the upcoming term as compared to previous fall terms

EAB Offers Incredible Time to Value And Strong Competitive Advantage

EAB's team of experts assisted ECC in producing a functional, comprehensive solution in only two months. Edify dashboards equipped ECC to make fast progress on key initiatives instead of spending additional months building and testing a homegrown solution or working with a vendor that lacks EAB's industry expertise.

	ECC's partnership timeline with EAB's Edify	Typical build and buy timelines with alternative vendors or homegrown solutions

Month 1	✓ ECC met with EAB experts to determine needs and develop an implementation plan
	✓ ECC had insight into the model's design throughout a fully transparent integration process
		• Assemble an internal committee or meet with the vendor team
		  - Vendors may (or may not) have experience in higher ed, and may offer minimal insight into the development process
		  - Internal team may lack necessary expertise in data modeling

Month 2	✓ Edify used pre-built data maps to join and validate ECC's Canvas and Colleague data sources automatically
	✓ EAB created custom dashboards for ECC's stakeholders
	✓ Project completed and implemented in two months
		• Identify data needs and compile data
		  - Vendors typically lack pre-built maps to higher ed tech systems, causing long delays
		  - Internal teams often lack a data dictionary to guide the process

Month 3
 	
Month 4
	Competitive Advantage: Automated Updates Free Time for Strategic Progress
	
	While other schools await project completion and implementation, ECC can make progress on important institutional priorities and data-informed innovation.
		• Data compilation complete; tool testing and data validation begins
		  - Vendors' testing and validation process may require significant staff time and involvement
		  - Internal team may struggle to balance tool development with other priorities

Month 5+	Additionally, ECC's IR and IT teams no longer spend time monitoring dashboards that come from the Edify model. Edify's data model refreshes nightly to provide automated dashboard updates.	• If tool suits need: reports developed and distributed
		  - Vendors' reports may not meet exact needs or offer transparency
		  - Internal team must still manage dashboards for reporting, creating no relief on departmental resources
		• Otherwise, additional testing and development

> " EAB is a premier, responsive team, and we are leveraging EAB's expertise and Edify's capabilities for our LMS Dashboards and DEIA initiatives. We wouldn't have any data warehouse environment today if it wasn't for EAB. "
>
> —*Loic Audusseau, Chief Technology Officer*

To learn more about Edify or speak to an expert, visit **eab.com/edify.**

Campaign to 'Free the Data' Transforms IR's Work—and Supports Enrollment Growth

University of Montana

This case study discusses • Enrollment and revenue growth • Culture of data confidence

- **About:** University of Montana (UM) is the flagship institution of the Montana University System. Located in Missoula, MT, UM is a large public research university that enrolls 11,000 students.

- **Challenge:** The University of Montana has suffered from enrollment declines over the past decade. Poor governance hampered attempts to remedy the decline. Data was stored in separate systems that only experts could access, reports were hard to compile, and different teams often produced different answers to the same question. Data-informed recommendations were sometimes ignored because leaders received conflicting figures.

- **Solution:** UM partnered with EAB's education data platform, Edify, to improve data governance and increase access. Edify aggregates and organizes all campus data into one environment with a single point of access. With newly centralized data, UM's team of developers can easily export data to over 50 dashboards they've built in Tableau, making validated data available for analysis and decision support across campus.

- **Impact:** UM's Institutional Research (IR) team regained hours previously spent manually updating dashboards. The IR team is using this new time for higher-order analyses, for example, developing KPIs for the five initiatives in the UM strategic plan and analyzing historical student accounts data to create an interactive dashboard that will help maximize the impact of tuition waivers on enrollment.

Impact Highlight

> "Without the infrastructure of Edify, strategic analyses are too labor-intensive. You're saving us having to hire a lot more staff."
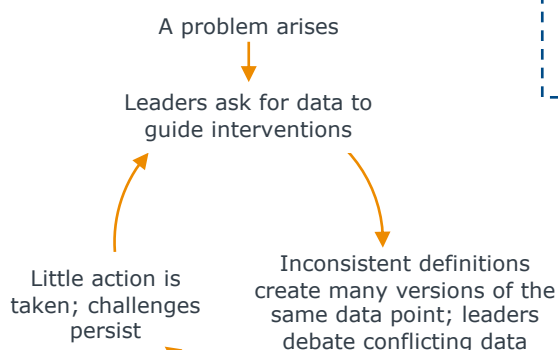>
> *-Dawn Ressel, Associate Vice President of Strategic Planning and Analysis*
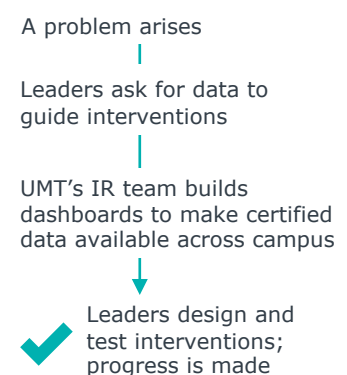
Breaking the Cycle of Indecision

UM's "Free the Data" Campaign Moves Data Users from Debate to Action

Since 2016, UM's Associate Vice President of Strategic Planning and Analysis, Dawn Ressel, has led a campaign to "free the data," to move UM's campus data from a matrix of siloed and hard-to-access systems to an environment in which users across the university can easily access reliable information. In 2020, UM partnered with Edify to further this work. With Edify, UM will have a centralized hub of certified data that can be exported to Tableau dashboards for reference and analysis. Before these improvements, disagreements about data accuracy frequently stalled progress on strategic initiatives.

The problem: Inconsistent data creates early stumbling blocks

A problem arises
↓
Leaders ask for data to guide interventions
↓
Inconsistent definitions create many versions of the same data point; leaders debate conflicting data
↓
Little action is taken; challenges persist
↺

+ Better university-wide data governance

+ Wider access to data

"Free the Data" Campaign and Edify Partnership

The goal: Leaders across campus make data-informed decisions

A problem arises
|
Leaders ask for data to guide interventions
|
UMT's IR team builds dashboards to make certified data available across campus
↓
✓ Leaders design and test interventions; progress is made

Enabling Strategic Analytics

Edify Partnership Will Help Move IR from Data Gathering to Analysis

Before partnering with Edify, UM's IR team spent most of their time completing ad hoc analyses and manually updating dashboards. As data starts flowing through Edify, they will regain significant time:

- UM's Associate Vice President of Strategic Planning and Analysis estimates **Edify will save her team one month's work every year** given the 5 to 10 hours they spend regularly updating each of 30 dashboards.

- Recently, **an EAB data expert was able to understand and decode UM's student accounts data in a one-hour call, something the UM IR team had struggled with for years** due to limitations in the SIS.

With more time available, the IR team and data experts across campus will be able to refocus their energy on strategic analytics. This includes developing KPIs to measure progress on the five priorities of the UM strategic plan.

Data to Operationalize Strategic Goals

Strategic priority: "Place student success at the center of all we do"

Goal: Improve retention and graduation

Action: Allocate resources where need is greatest

Accountability: Track progress

With better data governance and access, IR can more easily:

- Provide easy-to-use dashboards that illustrate data beyond institution-level trends (e.g., retention rates in individual colleges and departments)

- Use historical data to develop leading indicators for potential retention risks

- Develop KPIs to track the institution's progress on its goal of improving retention and graduation

"We've been bean counters for years. **I don't need to know how many; I need to know *why*.**"

*Dawn Ressel,
Associate Vice President of
Strategic Planning
and Analysis*

Source: "Strategic Initiatives," UM Office of the President.

Maximizing Tuition Assistance to Increase Enrollment

Dashboard Will Track Waivers to Monitor Net Tuition Amounts and Student Enrollments

Over the last eight years, enrollment at UM continued to decline despite their low tuition price compared to other state flagship institutions. In response, UM offered tuition waivers to encourage enrollment. Recognizing that the University can't increase the amount of tuition waivers indefinitely, the IR team is using Edify to build a dashboard that will track and analyze years of tuition waiver data to determine which enrollment strategies work. The specific goals of the dashboard are to:

- Find the band of tuition waiver amounts that lead to enrollment so UM can then make the most of their resources.

- Develop leading indicators to create earlier visibility into whether UM has more money to offer (currently, this data is not available until the fall).

Dashboard Plans in Detail

Metrics
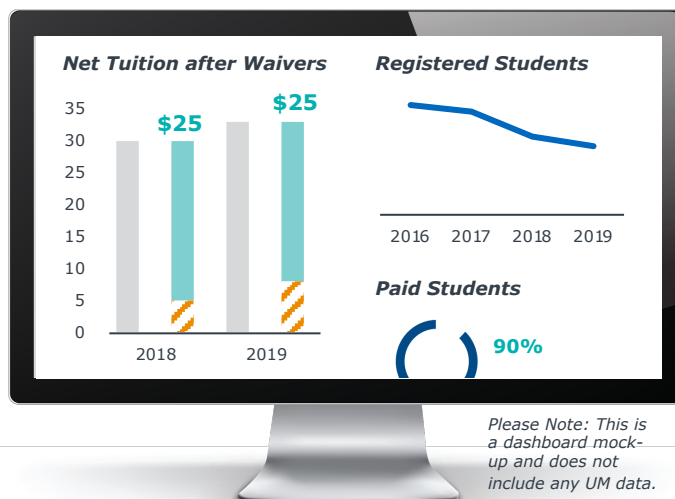- Waiver amounts granted
- Enrollment
- Net tuition revenue

Users
- Operations and Finance
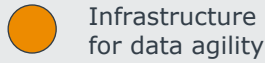- Enrollment Management
- President's Cabinet

Users will be able to **toggle between historical and live data**

Net Tuition after Waivers

Registered Students

Paid Students 90%

Please Note: This is a dashboard mock-up and does not include any UM data.

An Integration Command Center Expands Access to Reliable Data Across Campus

John Carroll University

This case study discusses   ● Infrastructure for data agility

- **About:** John Carroll University (JCU) is a small private Jesuit liberal arts university outside Cleveland, Ohio, with more than 3,600 students, consistently ranked one of the Midwest's top regional universities.

- **Challenge:** JCU's technology ecosystem ballooned in recent years, leading to siloed data accessible only through a complex web of integrations. Running multiple technology systems, each with its own data management path, meant basic figures weren't consistent across systems. Changes to a system, integration, or analysis required significant time and effort from JCU's IT team.

- **Solution:** JCU partnered with EAB to implement EAB's education data platform, Edify, as a comprehensive integration command center. Data communicating between systems now flows through Edify, which automates data validations and serves as the single control point for all cross-system integrations.

- **Impact:** JCU's IT team can easily change data definitions across systems, since data is aggregated in one comprehensive model. With the time saved by Edify, they also have time to support strategic initiatives as the institution develops more sophisticated uses for data and analytics. Beyond IT, users across campus can easily access data without source system expertise and be confident in the data's quality.

Impact Highlights

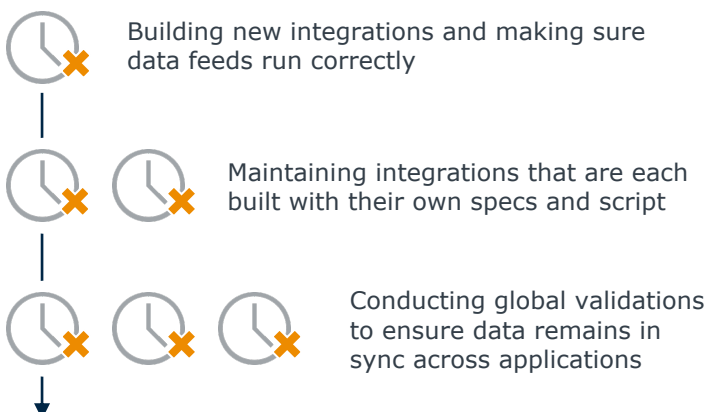**75%**

Reduction in time to make a data change across all systems

Minutes, not days

Required to defend data to campus stakeholders now that all systems use consistent data elements

---

Lowering the Burden of Integration Maintenance Scales IT's Impact

JCU's IT Team Regains Valuable Time to Work on Strategic Initiatives

Complex System Creates a Pile-Up of Time-Intensive Work

Building new integrations and making sure data feeds run correctly

Maintaining integrations that are each built with their own specs and script

Conducting global validations to ensure data remains in sync across applications

*With each new integration, the maintenance burden grows*

> "We are setting up a consistent and repeatable integration environment where changing an integration is easy. **The ability to extend the value of my team is priceless**."
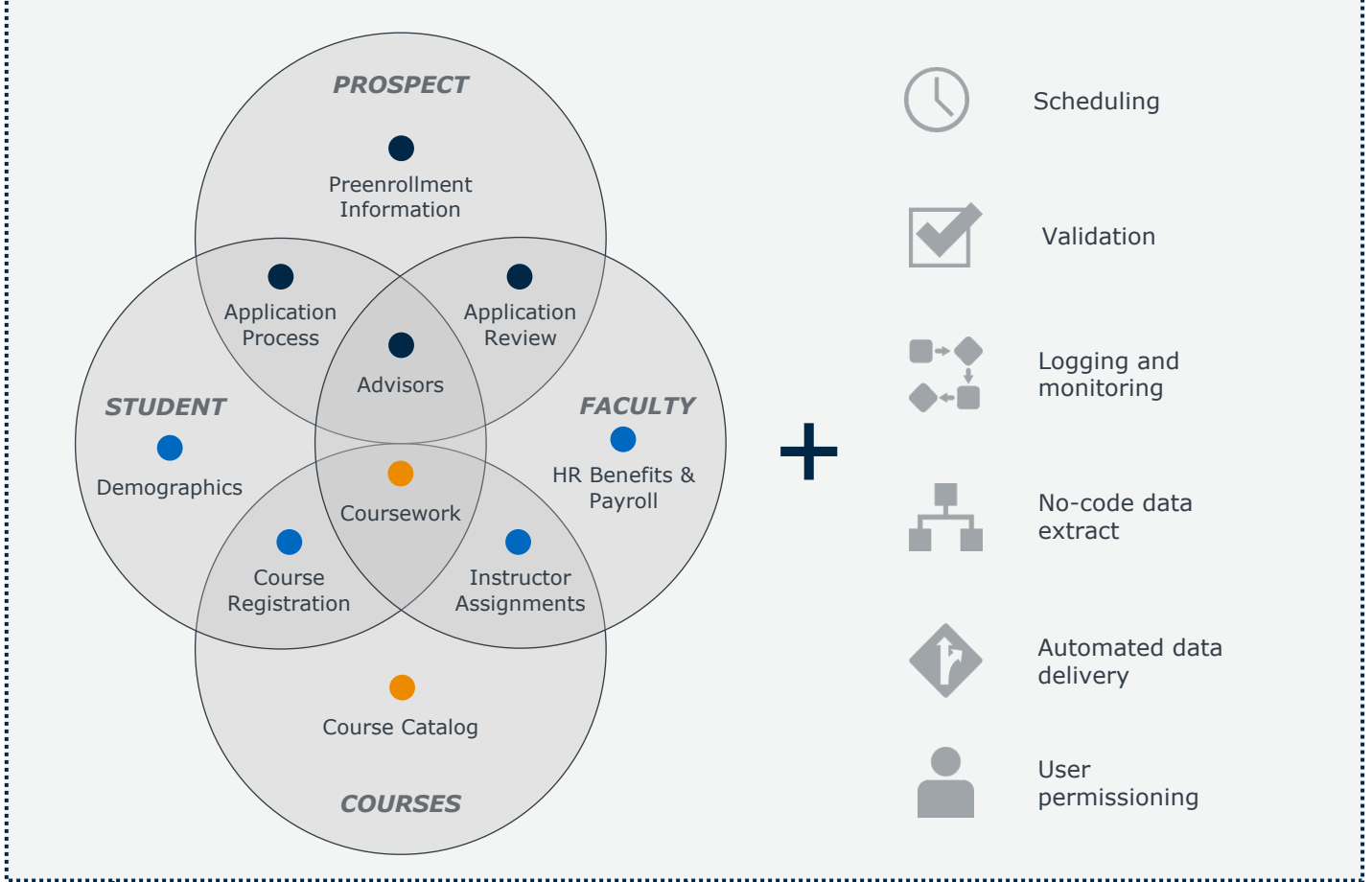>
> Jim Burke,
> Chief Information Officer

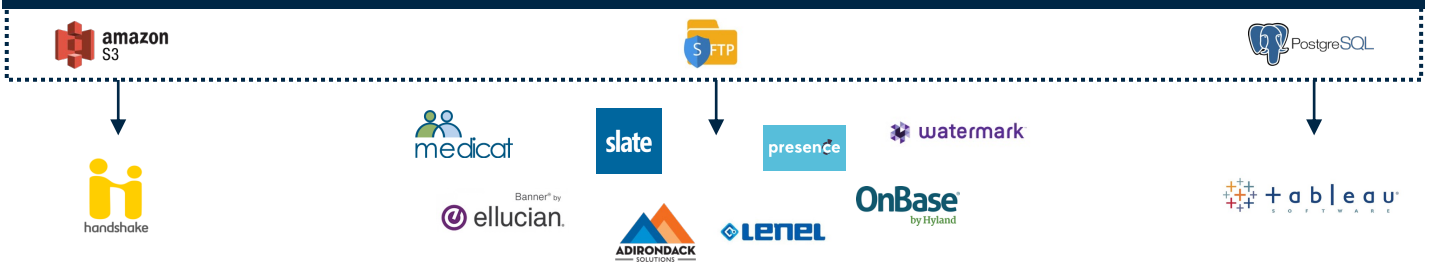# Orchestrating Integrations in an Easy-to-Manage Platform

Largest and most critical source systems provide data

Banner by ellucian ●●●   slate ●●●   canvas ●●●
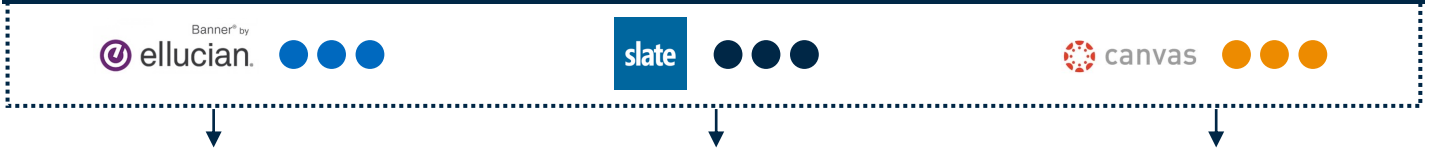
Edify's data model organizes disparate data, while additional features facilitate access and validation

PROSPECT
- Preenrollment Information

STUDENT
- Demographics
- Application Process
- Application Review
- Advisors
- Coursework
- Course Registration
- Instructor Assignments

FACULTY
- HR Benefits & Payroll

COURSES
- Course Catalog

+

- 🕐 Scheduling
- ☑ Validation
- Logging and monitoring
- No-code data extract
- Automated data delivery
- User permissioning

Consistent and reliable integrations actualize data governance efforts across existing technologies

amazon S3   SFTP   PostgreSQL

handshake   medicat   slate   Banner by ellucian   ADIRONDACK SOLUTIONS   Lenel   presence   OnBase by Hyland   watermark   tableau SOFTWARE

The Impact

Edify lets JCU use data and technology to serve students and staff more efficiently, dramatically reducing the manual time spent on integration and validation. As JCU seeks to develop more sophisticated uses for data, Edify promotes consistency and reliability by delivering a single representation of campus data.

75%
Reduction in time to make a data change across all systems

Standardizing Faculty Line Requests to Build Institutional Trust and Fund Strategic Priorities

Middle Tennessee State University

This case study discusses	⚪ The academy and fiscal resilience	🟠 Infrastructure for data agility

- **About:** Middle Tennessee State University (MTSU) is a large public research university with a total enrollment of 21,913.

- **Challenge:** MTSU lacked a standardized process for evaluating faculty line requests. Deans and department chairs did not have clear submission guidelines or evaluation criteria, and the provost faced a barrage of sporadic requests containing different data points, making objective evaluation difficult. Additionally, deans and chairs felt that, without a standardized process, subjectivity could play a role in evaluation.

- **Solution:** The provost and key stakeholders developed objectives, deadlines, and a formal process for faculty line requests. EAB partnered with MTSU to surface and consolidate the necessary data. MTSU initially created an Excel sheet to provide chairs and deans with required data, and while the Excel sheet facilitated the process, it was not immediately comprehensible to everyone who needed to use it. Using EAB's Edify, MTSU automatically standardized required data and made it easily accessible with intuitive and filterable dashboards.

- **Impact:** Deans and chairs can find and understand required data and complete faculty line requests efficiently using the new faculty line request process and Edify dashboards. The provost can review and assess requests using standardized, objective criteria, creating a transparent and trusted process for all involved.

Impact Highlights

252 positions
Efficiently evaluated by the provost during the first fall and spring review

Improved trust
And transparency in the faculty line evaluation process

Compiling Standardized Data for Each Department

Dashboards compile like data points for each department, enabling objective comparison

MTSU partnered with EAB to organize required data into reports accessible to chairs and deans. This ensured that each department submitted the same data points for evaluation. For ease of access, MTSU used Edify to structure the reports into dashboards that provided relevant data to each chair and dean. Examples of data points in the dashboards include:

Enrollment
- Department enrollments
- Majors
- 3-year trends

Faculty Workload
- Student credit hours taught per instructor
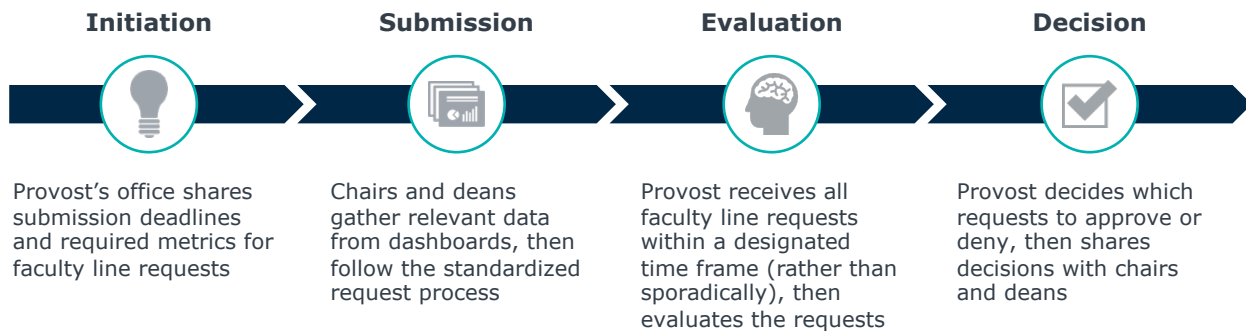- Course release hours

Capacity
- Class sizes
- Fill rates

Formalizing the Faculty Line Request Evaluation Process

MTSU developed a timeline for faculty line requests, then created a standard submission process for each chair and dean to complete when submitting requests. The submission materials included boxes for each required data point, as well as space for comments and context.

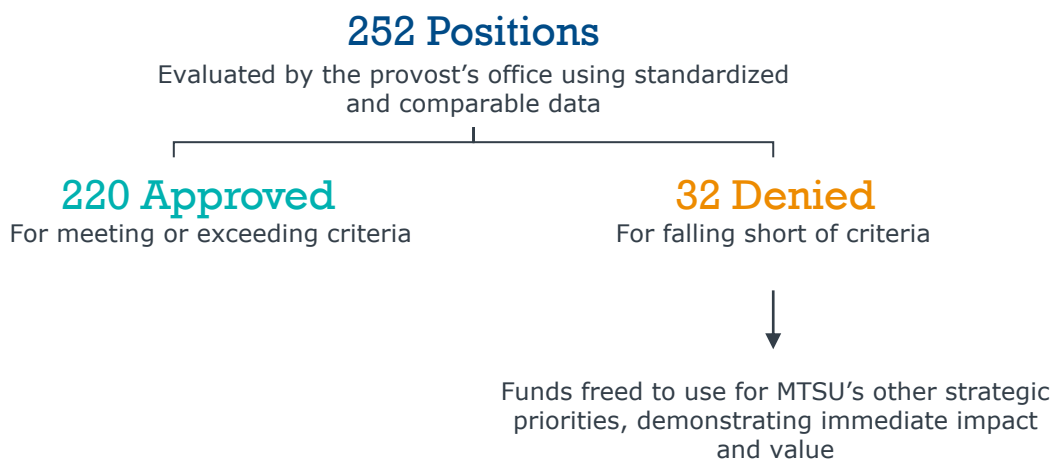| Initiation	Submission	Evaluation	Decision
Provost's office shares submission deadlines and required metrics for faculty line requests	Chairs and deans gather relevant data from dashboards, then follow the standardized request process	Provost receives all faculty line requests within a designated time frame (rather than sporadically), then evaluates the requests	Provost decides which requests to approve or deny, then shares decisions with chairs and deans

Edify Enables Objective, Multifaceted Request Evaluation

Streamlined access to reliable data and a templated request submission process equipped the provost to make data-informed decisions about which faculty line requests to approve. The provost evaluated each request using departmental and instructor-level metrics, assessing each request against multiple criteria.

Example Criteria

Key Consideration	Substandard	Mixed	Ideal
Total Student Credit Hours (SCH) per department	Declining SCH	Some growth in SCH	Growing SCH
Course Fill Levels	Many low-fill courses	Blend of high- and low-fill courses	Many high-fill courses
Consolidation Opportunities	Many opportunities	Some opportunities	Few opportunities
Median Student Credit Hours (SCH) per instructor	Low SCH per instructor	Some instructors with high SCH, some with low	High SCH per instructor

Standardized Request Process Brings Direct Fiscal Benefit to the Institution

252 Positions
Evaluated by the provost's office using standardized and comparable data

220 Approved
For meeting or exceeding criteria

32 Denied
For falling short of criteria

Funds freed to use for MTSU's other strategic priorities, demonstrating immediate impact and value

Inside A Community College's Streamlined, Custom Enrollment Data Warehouse Implementation

Northern Iowa Area Community College

This case study discusses	🔵 Enrollment and revenue growth	🟠 Infrastructure for data agility

BACKGROUND

North Iowa Area Community College (NIACC) is a public community college in Mason City, Iowa with 2,500 students, about half of whom attend full-time.

🔍 KEY RESULTS

▶ **Automated accuracy auditing** of enrollment data from Canvas and Colleague

▶ **Extensive CIO input** during implementation and setup

▶ **Decreased demand on IR** since enrollment dashboards now update automatically

▶ **Data from multiple sources** can now be cross-referenced in one user-friendly space**:**
  - Canvas
  - National Student Clearinghouse
  - Colleague ERP
  - Navigate CRM

OPPORTUNITY

NIACC had limited insight into its enrollment funnel and needed a way to make data visible and actionable

Greg Bailey, NIACC's CIO, knew that to improve access to enrollment data, his institution needed to modernize its approach to data infrastructure in a cost-effective, customized fashion. NIACC sought a cloud-based data management platform that would enable deep data exploration. Bailey wanted to be hands-on with the implementation process and apply his institutional knowledge and technical expertise to ensure the platform was tailored to NIACC's needs.

SOLUTION

NIACC partnered with EAB to create a customized Strategic Enrollment Management (SEM) dashboard

NIACC implemented EAB's Edify to centralize and synthesize Canvas, Colleague, Navigate, and National Student Clearinghouse data. During implementation, Bailey was in direct communication with EAB's engineers, vetting design and offering input on code.

IMPACT

NIACC's SEM Dashboard offers more accurate insight and puts less demand on the IR team

The SEM dashboard allows NIACC to understand and strategize around trustworthy data. Bailey participates in weekly conversations with his designated Strategic Leader at EAB, uncovering potential future projects and exploring additional areas of interest for improving NIACC's data infrastructure.

> " It was important to me to have a level of connection with EAB's software development team. With EAB, there was no disconnect where I had to work through someone else—I was able to work directly with the team and share feedback on the code. **We spoke the same language.** "
>
> Greg Bailey, Chief Information Officer
> *North Iowa Area Community College*

NIACC

Enrollment Visibility for Enhanced Strategy and Decisions

HOW NIACC GAINED INSIGHT INTO THEIR ENROLLMENT FUNNEL

NIACC's Strategic Enrollment dashboard blends data from Colleague and the National Student Clearinghouse to offer deep enrollment insight segmented by subpopulations of students. The dashboard is tailored to NIACC's needs and offers nuanced data exploration through varied macro- and micro-level workspaces, including:

- Overall class outcomes
- Market expansion opportunities
- Pipeline snapshots
- Enrollment overview metrics
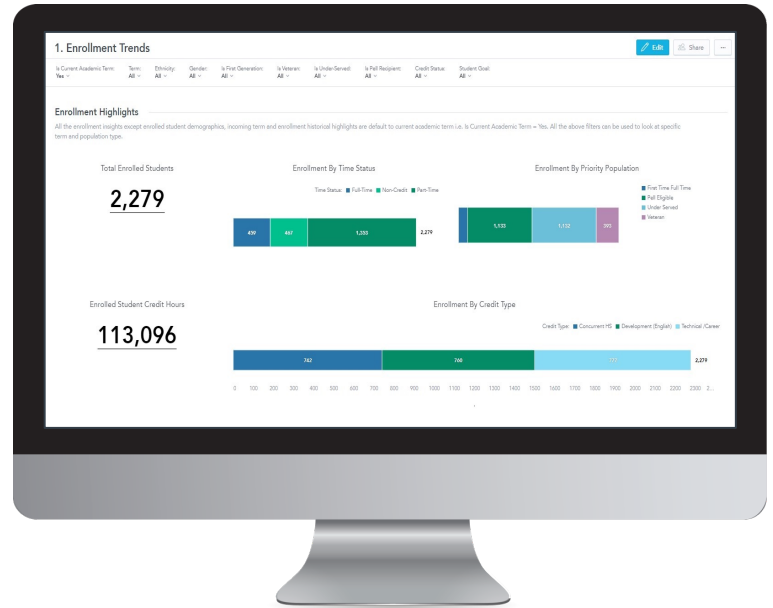
EDIFY PARTNERSHIPS ARE TAILORED TO YOUR INSTITUTION'S UNIQUE NEEDS

Creating a trusted single source of truth for data on your campus is only the first step in your Edify partnership. The Edify team works directly with your institution to execute on your campus's most pressing data needs, whether they fall under Enrollment, Retention, Advancement, Finance, or elsewhere. During the implementation process and beyond, EAB will work to identify and deliver on improvements across the entire campus.

Identify your institution's data goals and priorities

- Through a data strategy audit and meetings with the Edify team, determine your institution's first project
- EAB will synthesize necessary data sources into Edify's data warehouse

Complete an initial project

- Choose your level of involvement during implementation—the process and platform are both fully transparent
- Initial project delivered within two months to one year, depending on complexity

Plan and execute additional improvements and projects

- Continue working with your designated Strategic Leader to plan and execute projects
- Expand efforts beyond your initial focus area into other departments and offices

Bringing a Multi-Dimensional Approach to Student Support and Attrition Analysis

The Community College of Allegheny County

This case study discusses ● Student success and experience ● Infrastructure for data agility

- **About**: The Community College of Allegheny County (CCAC) is a multi-campus public community college in Pittsburgh, PA with 20,336 credit-earning students.

- **Challenge:** CCAC wanted to deliver a proactive, holistic, and tailored support approach across their Student Success Services team. CCAC encountered several limitations with their Ellucian Advise student success platform, including its lack of appointment scheduling functionality. CCAC sought an improved system but hoped to preserve all Advise data for reference. Additionally, CCAC wanted to investigate which factors made students most likely to stop out.

- **Solution:** CCAC implemented Navigate360 and Edify (EAB's CRM and Data & Analytics Solution, respectively). Edify allowed CCAC to conduct a historical review of Advise data, including alerts, flags, student GPA, and Pell eligibility. CCAC also incorporated student records (broken down into subsets) from an institution-developed platform, facilitating a comprehensive review. Navigate360 equipped CCAC to communicate with students, receive alerts regarding early academic needs of students, and track appointments.

- **Next Steps:** With data stored securely in Edify, CCAC plans to build a predictive model to improve their enrollment strategies. CCAC will also use Edify and Navigate360 to identify student issues or concerns, track which resources students are referred to, and measure which intervention and outreach strategies and resources have the greatest impact on student success and retention.

Impact Highlights

✓ Edify attrition dashboards equip CCAC for an in-depth historical review of support activities

✓ Navigate360 allows CCAC to deliver case management-style student support

Seamless Data Archiving in EAB's Edify

Edify Facilitates a Smooth Transition Between Student Success Technologies

Advise CRM data for extraction included:	Edify model archived data automatically:		New capabilities:
• Alerts • Flags • Transactional data • Notes associated with each student	• Pre-built workflows connect with Advise data codes • Advise data archived securely with no data loss or corruption • Outputs have readable, useful labels rather than confusing codes	• Has inputs for data from additional systems, such as CCAC's LMS and SIS, opening the door to future integrations	• Historical review • Stopout analytics dashboards • Data governance • Automated dashboard updates • Ongoing service partnership with Edify data experts for future projects

Edify and Navigate360 Enable a Multi-Faceted Student Support Strategy
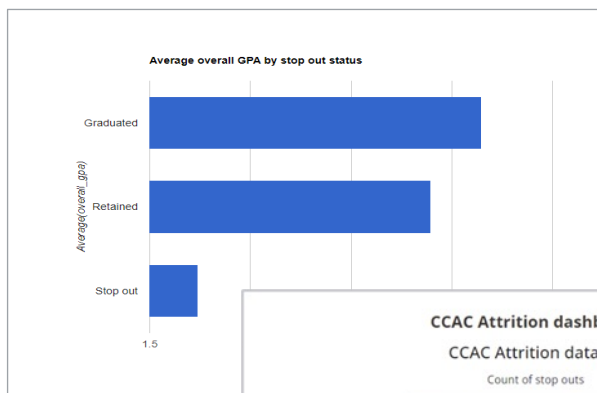
CCAC Can Take Informed Action to Address Factors that Lead Students to Stop Out

3 components of CCAC's support strategy

1

Strategic Historical Review

With an abundance of data stored in Edify, CCAC can conduct a rich historical review of alerts, flags, and transactional data to identify support activities that made a difference for students.

2

Segmented Stopout Analysis

CCAC's decision-makers can investigate attrition data at a high level to understand trends. Additionally, advisors and Student Success Services staff can drill down to see which subsets of their student population tend to stop out at higher rates, then build support systems to address factors that lead these students to stopout.
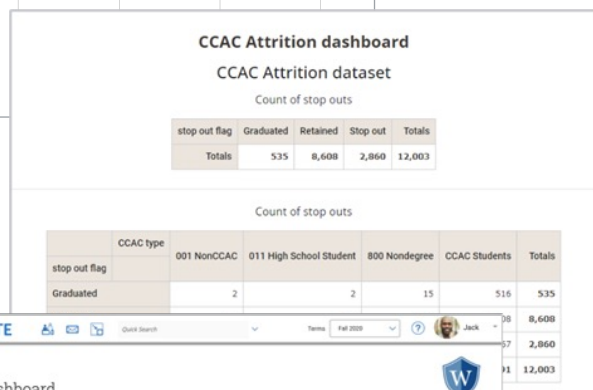
3

Tailored Student Support

Navigate360 equips advisors and Student Success Services staff to communicate directly with students, send automated messages based on alerts, and schedule appointments inside the app. Advisors and Student Success Services staff also have a continually refreshed record for each student, enabling ongoing tailored support.
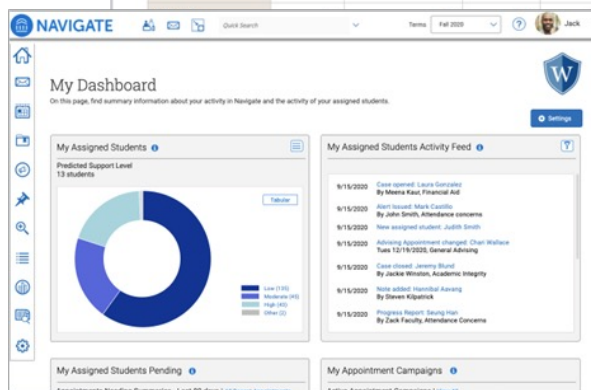
Taking Student Support Further with Navigate360

Moving from Advise to Navigate360 equips CCAC to Support Students Holistically

	Ellucian Advise	EAB Navigate360
Features	Did not offer adequate appointment scheduling	Offers in-app appointment scheduling, student communications, and direct support
Coordination	Did not provide coordinated care features	Allows staff to coordinate outreach and follow-up care for students
Design	Assembled from Ellucian's CRM, SIS, and analytics platforms	Built from the ground up as a standalone student CRM
Strategy	Did not lend to CCAC's case management approach to support	A suite of features facilitates a case management support system, treating each student's individual needs

Creating a Customized Strategic Enrollment Management (SEM) Dashboard

Elmira College

This case study discusses	🔵 Enrollment and revenue growth	🟠 Infrastructure for data agility

- **About**: Elmira College is a private college with a total enrollment of 673 students, a 76% retention rate, and a 56% six-year graduation rate.

- **Challenge:** Elmira had difficultly accessing data from their Enterprise Resource System (ERP), making detailed enrollment analysis and strategy challenging. Exacerbating the problem, Elmira saw several key IT staff resign in 2021. Facing a staff shortage and inadequate data access, Elmira needed a sustainable, user-friendly enrollment reporting system to facilitate strategic conversations before their enrollment census date.

- **Solution:** Elmira implemented EAB's Edify, unifying their ERP, SIS, and admissions CRM into one standardized source of truth. Their first output was a Strategic Enrollment Dashboard, which gives Elmira a trustworthy, clear picture of its enrollment forecast. The dashboards allow end users to segment their student population by specific criteria, such as major, enrollment cohort, and special populations. The data refreshes daily, equipping administrators to craft enrollment strategies based on reliable data. During IT staff turnover, the dashboards continue to refresh automatically and provide useful data to board members.

- **Impact:** Before Edify, Elmira's annual census report meeting required administrators to huddle over spreadsheets debating the report's accuracy. With Edify, senior leadership at Elmira can focus on strategically planning for the upcoming term rather than validating their data. Edify's automated data warehouse also equipped Elmira College to use predictive analytics to identify enrollment and retention opportunities going forward.

Impact Highlights

75%
reduction in time required to review census data

3
systems (admissions, enrollment SIS, and financial aid) combined for visualizations

7
board members served by the Strategic Enrollment Management dashboard

Creating an Integrated Reporting Solution for Enrollment Data

*Uniting Disparate Sources of Data into a Single Source of Truth*

Elmira brought three distinct systems together into Edify's data warehouse, which uses an automated data model to cleanse and map data into unified records. The end result was a standardized source for Elmira's enrollment data, which Elmira then used to create their SEM dashboard.

Human Resources Data (ERP)

Admissions Customer Retention Management Data

Edify synthesizes and standardizes all data with an automated data model

The result is a trusted single source of truth for standardized, accessible data

SIS Data

Financial Aid Data (ERP)

SEM Dashboard Facilitates In-Depth, User-Friendly Data Explorations

Users Gain Nuanced, Intuitive Insight into Enrollment and Retention at Multiple Levels

With data unified in Edify, Elmira's SEM dashboard provides a comprehensive understanding of enrollment trends, market expansion opportunities, and class outcomes. Individual users can ask and answer detailed questions by filtering and drilling down into the data through visual, digestible layouts.
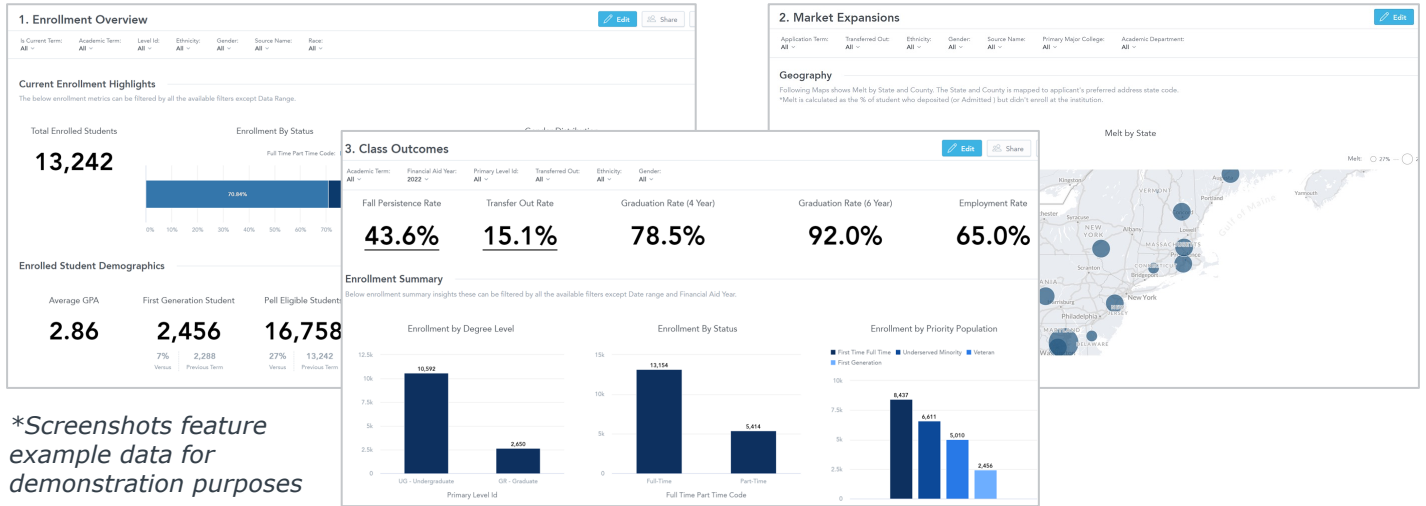
Screenshots feature example data for demonstration purposes

> **"** With Edify, we have a clear sense of momentum around reporting. We are able to get much more granular data and understand what influences enrollment and persistence. We can **dive deeper into the data** and understand which messaging and initiatives generate enrollment."
>
> *-Eric Sykes, Vice President of Enrollment Management at Elmira College*

Edify Offers a Range of Data Culture and Infrastructure Improvements

Standardized, Accessible Data Creates Opportunities for Data Investigation and Collaboration

Through its use of the SEM dashboard, Elmira discovered numerous benefits to its work with data beyond the direct impact on enrollment management strategy.

Improving Data Quality and Accuracy	Initiating Data Governance Steps	Sparking Further Questions and Discussions
SEM dashboard flags data discrepancies so they can be fixed prior to reporting deadlines	Data warehouse will be expanded to include data from other departments	User-friendly dashboard allows users to explore data on their own, generating new ideas
Investigations into data discrepancies prompt improvements to entry and storage protocols	Dashboard uses role-based permissions to display relevant data and keep data secure	Users approach IR and IT with questions and ideas based on their data investigations
End users develop greater trust in the data	Users share a feeling of responsibility for data	New projects and priorities develop

To learn more or schedule a demo, visit **eab.com/Edify**.

Building Responsive COVID-19 Data Dashboards

Fairfield University

This case study discusses	🔵	Student success and experience	🟠	Infrastructure for data agility

- **About:** Fairfield University is a midsize private Jesuit college in Fairfield, CT, with 5,500 students, a 90% average retention rate, and an 84% six-year graduation rate.

- **Challenge:** Like most colleges, Fairfield was forced to make rapid, significant changes to every facet of its operations when COVID-19 struck. Seeking to provide a safe on-campus education experience for students in the Fall 2020 semester, administrators created a task force of staff and health professionals. The task force required accessible, up-to-date data that could help them respond to the evolving situation.

- **Solution:** Fairfield's Institutional Research department used Rapid Insight's self-service analytics technology to organize reams of live data from several sources (both internal and external), then output the data to Excel for distribution to the COVID-19 task force and for public consumption. Using the dashboard, the task force could make data-driven decisions to contain infections, predict positivity rates, estimate the number of tests required, and prepare isolation beds.

- **Impact:** Fairfield's Rapid Insight dashboard allowed the task force to make timely, informed decisions and provide students with a safe on-campus experience. As the challenges presented by the pandemic continue to evolve, Fairfield's response is adapting as well, shifting from contact tracing to testing availability to vaccination rates. With Rapid Insight's intuitive, repeatable data workflows, Fairfield's IR team easily expands the dashboard to answer new questions.

Impact Highlights

20
Data points per student included in the dashboard

30
Task force members receive daily status updates

40
Available data visualizations and tables

❝ We built a very strong reporting infrastructure in a matter of days."

*—Daniel Grazynski,
Assistant Director of IR*

Initial Dashboard Predicted Positivity Rate to Enable a Safe Reopening

COVID-19 Task Force Prepared Tests and Facilities to Prevent Transmission

Rapid Insight Dashboard Data Inputs

Student's personal profile

Student's state of origin

COVID-19 positivity rates by state
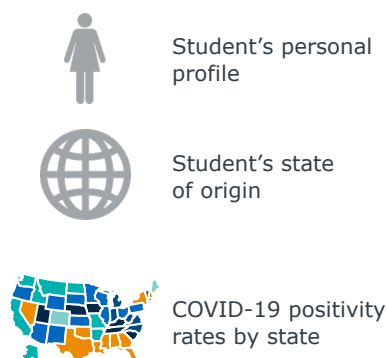
Potential Positivity Prediction

Fairfield Predicted the Need For:

✔ Test quantity

✔ Isolation beds

✔ Staffing for testing centers

Adapting the Dashboard as Needs Evolve

As the COVID-19 pandemic evolved, Fairfield's dashboard incorporated new data and answered emerging questions. Rapid Insight makes it easy to add new data to the existing workflow, allowing Fairfield's task force to receive relevant daily updates and address new challenges as needs change.

Timeline	Key Question	Data Added to Dashboard	Outcomes for Fairfield
COVID pandemic begins	Can we reopen safely?	• State-level infection rates • State of student origin • Student demographic data	✓ Understood potential positivity rate ✓ Prepared facilities for student safety
Fall semester (2020)	How do we keep students safe?	• Infection rates by dorm • Daily and weekly infection trends	✓ Stocked testing facilities to the appropriate levels ✓ Isolated infected students
Uptick in COVID-19 cases	How do we minimize spread on campus?	• Employee and vendor data • Predicted infection recovery dates	✓ Shifted to delivery dining ✓ Contracted with hotels for isolation beds
Vaccine distributed widely	How do we get the vaccine to students?	• Overall vaccination numbers • Vaccination rates by dorm	✓ Hosted on-campus vaccination clinics ✓ Encouraged students to get vaccinated
Booster available to general population (2021)	How can we ensure the booster is available?	• Overall booster rates • Booster rates by dorm	✓ Measured impact of booster on transmission and institutional operations ✓ Reviewed and decreased potential clusters of unvaccinated or unboosted campus members

2022

In addition to the information above, the most recent iteration of Fairfield's dashboard tracks daily and weekly cases, trends, and case counts by variables such as dorm of residence and athlete status. Fairfield's dashboard will continue to change and serve the task force's needs.

Rapid Insight's Analyst Support Team Played a Critical Role

Fairfield's Institutional Research department worked with Rapid Insight's team of support analysts to implement the dashboard and create the automated data workflows. As the pandemic evolves and the report changes along with it, Fairfield IR always has a team of experts to consult on the workflow before implementation.

> " The Rapid Insight Support Team are the greatest superheroes of our time....They are eager to listen and genuinely interested in our work."
>
> -Daniel Grazynski, Assistant Director of Institutional Research, Fairfield University

Rapid Insight is now part of Edify, EAB's data and analytics solution designed for higher ed. Learn how you can leverage your institution's data for success at **eab.com/edify**.

Targeted Academic Support Outreach Generates $18 Million in Retention Revenue

Lipscomb University

This case study discusses

⬤ Enrollment and revenue growth

⬤ Student success and experience

- **About:** Lipscomb University is a small private Christian university in Nashville, TN, with 4,884 students, an 86% retention rate, and a 69% six-year graduation rate.

- **Challenge:** Facing a dip in retention, Lipscomb sought to create an efficient, impactful data strategy to course-correct. Lipscomb wanted to identify students struggling with coursework, contact those students, and invite them to the Academic Support Center. However, compliance reporting took two months for their one-person Institutional Research team to complete, limiting time to focus on this initiative. Disorganized data and a lack of up-to-date outreach lists posed additional obstacles.

- **Solution:** Lipscomb implemented Rapid Insight's data analytics tools (Construct, Predict, and Bridge) to organize student data, flag students at risk of attrition, and structure Academic Support outreach lists using live data. Lipscomb also used Construct to automate the time-consuming accreditation reporting process.

- **Impact:** A 15 percentage-point retention rate improvement over nine years generated $18 million in tuition and fee revenue. Additionally, Lipscomb now completes its accreditation reporting in two days rather than two months—a 95% reduction in required staff time.

Impact Highlights

15 **percentage-point**
Retention increase across nine years

$18M
Additional tuition and fee revenue from improved retention rate

95%
Faster accreditation reporting process due to Rapid automation

Rapid Insight Tools Enable Data-Informed Retention Strategies

Lipscomb Lacked the Clean, Actionable Data Required for Tailored Outreach

| Disorganized data stored in multiple formats made efficient analysis difficult	Academic support staff did not have a method for identifying students in need of guidance	Outreach lists could not be prioritized with live, easily accessed information

Organize data from across campus to create trustworthy data sets
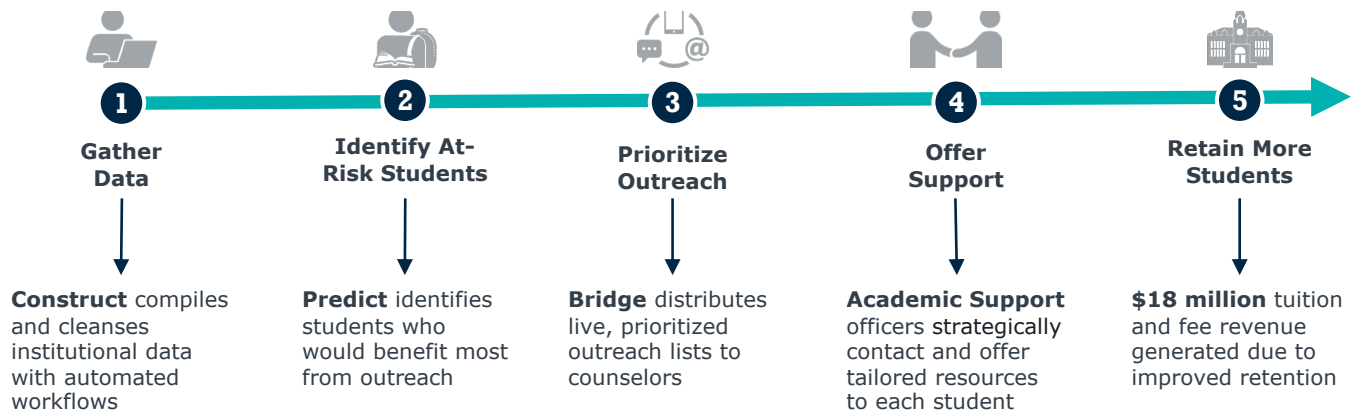
Use predictive models to flag students in need of help

Equip Academic Support counselors with up-to-date retention probabilities
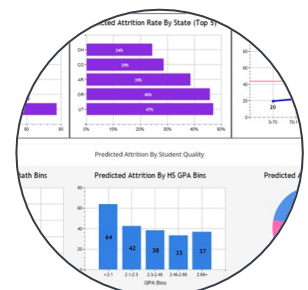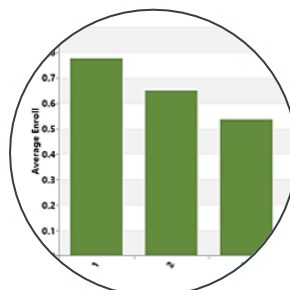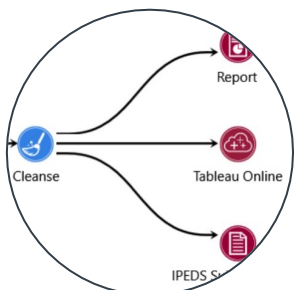
Rapid Insight Improves Every Stage of Lipscomb's Retention Effort

Improved Strategic Outreach Process Provides Support to the Students Who Need It Most

1 Gather Data	**2** Identify At-Risk Students	**3** Prioritize Outreach	**4** Offer Support	**5** Retain More Students
Construct compiles and cleanses institutional data with automated workflows	**Predict** identifies students who would benefit most from outreach	**Bridge** distributes live, prioritized outreach lists to counselors	**Academic Support** officers strategically contact and offer tailored resources to each student	**$18 million** tuition and fee revenue generated due to improved retention

Report Automation Results in Huge Time Savings

Lipscomb drastically reduced time to completion for its annual accreditation reporting
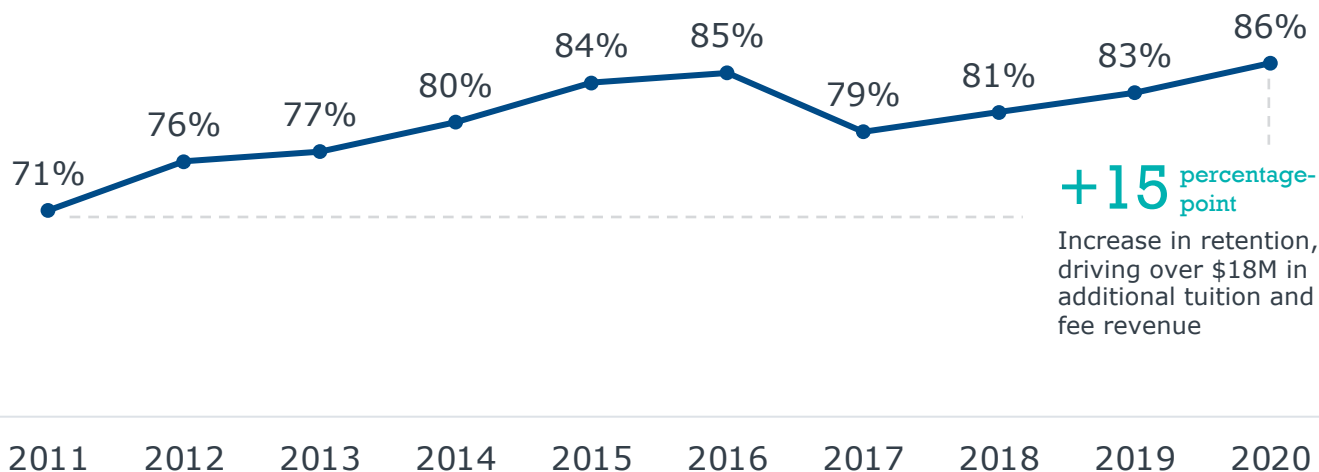
BEFORE
Complex credit-hour reports took **two months** of staff time to compile and submit

AFTER
Rapid Insight's automated workflows reduced completion time to **two days**

Retention Rate Climbing as Data Becomes More Accessible

Full-Time Freshman Retention Rate Since Launching Rapid Insight in 2012

71% (2011), 76% (2012), 77% (2013), 80% (2014), 84% (2015), 85% (2016), 79% (2017), 81% (2018), 83% (2019), 86% (2020)

+15 percentage-point

Increase in retention, driving over $18M in additional tuition and fee revenue

> "Rapid Insight expanded my ability to say yes to projects—and even gave me the confidence to be proactive and take on new responsibilities… . We went from **the stone age to the space age** in a matter of days with Rapid Insight."
>
> *Matt Rehbein, Director of Institutional Research*

Automating Report Delivery for Enrollment, Retention, Finance, and Compliance

Loras College

This case study discusses ● Infrastructure for data agility

- **About:** Loras College is a private Catholic college with 1,300 undergraduate students.

- **Challenge:** Faced with a dip in retention, Loras College's CFO and VP of Enrollment Management needed a fast, centralized enrollment and revenue report. However, the report required data from several platforms and offices, and obtaining that data required a cumbersome sequence of SQL queries, conversations, and manual updates. Additionally, the report was available only in a one-size-fits-all format, restricting its utility for each individual decision-maker. Compounding the problem, the department was short two of its usual five FTEs.

- **Solution:** Loras built workflows in Rapid Insight that automatically gather data from the student information system and other campus sources. The workflows include a predictive model that forecasts enrollment and revenue for coming terms. The data exports to an intuitive, customizable dashboard, equipping the CFO, VPEM, and other stakeholders to view the data in whichever format best enables them to make decisions.

- **Impact:** The weekly enrollment report, which formerly required 4 hours of convoluted SQL queries, now takes only fifteen minutes to create. Based on the success Loras had using Rapid Insight for its weekly enrollment reports, Loras expanded its use of Rapid Insight to IPEDS (which now takes less than three hours per submission cycle) and more than fifty other reports.

Impact Highlights

3
staff able to handle workload of 5 FTEs

10
days of staff time saved annually on prep for weekly enrollment report

50+
reports (internal and external) automated in Rapid Insight

Rapid Insight Eliminates Confusing and Cumbersome SQL Queries

Data workflows create a faster, more comprehensible process

Former Process

- Consult three databases, several hold tables, and numerous Excel sheets to gather the required data
- Run 28 SQL queries and 11 VBA modules
- Triage and repair any broken queries
- Send emails requesting missing data
- Wait for tables and data to load and validate
- Report Ready

Weekly time commitment: **3-4 hours**

New Rapid Insight Process

- Rapid Insight automatically pulls processes and exports data
- Make occasional updates to refresh workflows
- Report Ready

Weekly time commitment: **15 minutes**

Advanced Report Equips Administrative Council to Act

Multifaceted report facilitates strategic decisions in multiple departments

Enrollment

VP of Enrollment Management can forecast financial aid outlay

Class Size

Registrar can project overall class size for the upcoming term

Finance

CFO can view retention estimates by cohort and net tuition and fees revenue

Course Planning

Academic Affairs can predict enrollments for general education sections based on course type and student class level
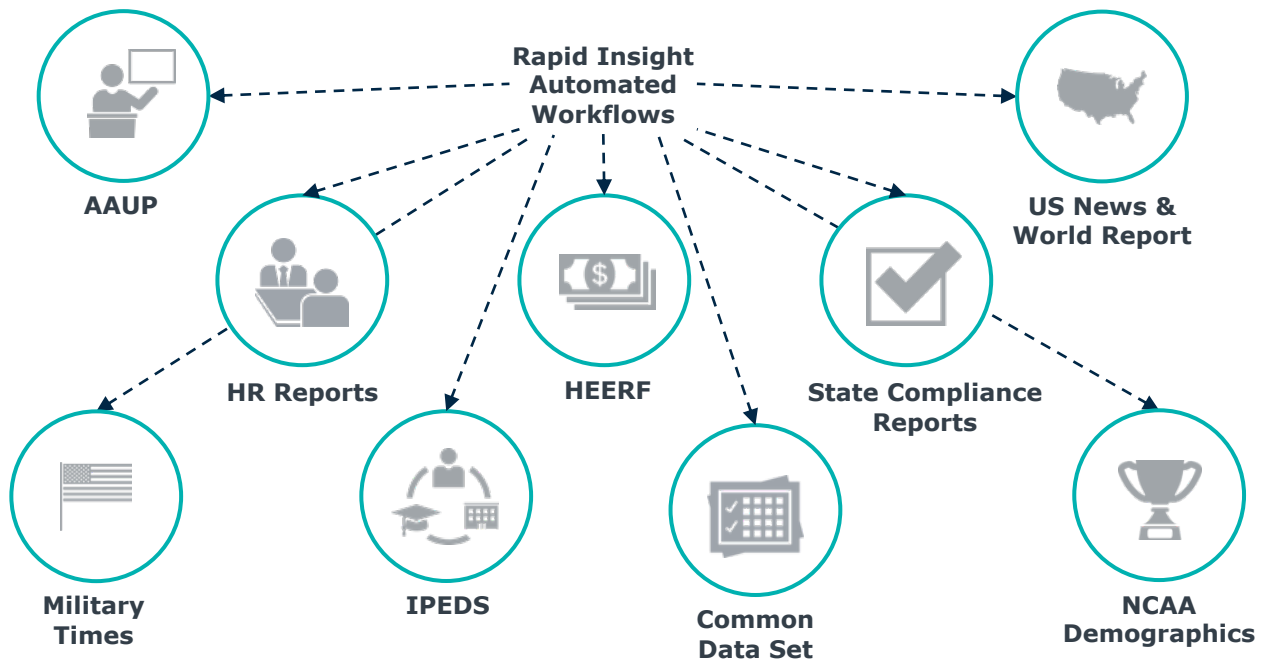
> " My supervisor was shocked at how many reports we complete. We've programmed every report we can. On the weekly enrollment report alone, we'll save ten days of staff time every year.
>
> *-Christopher Feit, Registrar and Director of Institutional Research, Loras College*

Automating a Broad Range of Institutional Reports

Loras created data cleansing workflows for more than fifty of its compliance reports

In twenty minutes each morning, Loras refreshes workflows for all of its daily and weekly reports, as well as larger reports with upcoming deadlines. Previously, it took between two and forty hours to prepare data for each report.
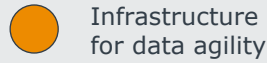
Rapid Insight Automated Workflows

AAUP

US News & World Report

HR Reports

HEERF

State Compliance Reports

Military Times

IPEDS

Common Data Set

NCAA Demographics

IPEDS Completion Is 75% Faster with Automated Data Preparation and File Formatting

Mount Saint Mary's University

This case study discusses ● Infrastructure for data agility

- **About:** Mount Saint Mary's University (MSMU) is a private college in Los Angeles, CA, with 3,000 students, a 72% retention rate, and a 63% six-year graduation rate.

- **Challenge:** Like every American university that receives federal financial aid funding, MSMU is required to submit a large amount of data to the National Center for Education Statistics (NCES)'s Integrated Post-Secondary Education Data System (IPEDS). MSMU's existing process for gathering, organizing, and submitting data consumed 40 tedious hours of staff time across multiple research analysts. It required manual data input and a time-consuming verification process to ensure accuracy prior to submission.

- **Solution:** MSMU used Rapid Insight to develop workflows for the IPEDS Completions Survey, one of three major reporting periods each year. The workflows gather data from all relevant sources and compile a clean, accurate file for automated upload to the NCES. The saved, repeatable workflows can be reused each IPEDS cycle with minimal updates to match new IPEDS submission guidelines.

- **Impact:** Rapid Insight reduced the time required to finish the Completions Survey by 75%, from 40 hours to 10. This freed up two staff members to work on other institutional priorities. MSMU currently uses Rapid Insight for the IPEDS Completions Survey and plans to develop workflows for the remaining IPEDS surveys.

Impact Highlights

75%
Reduction in time required to submit IPEDS surveys
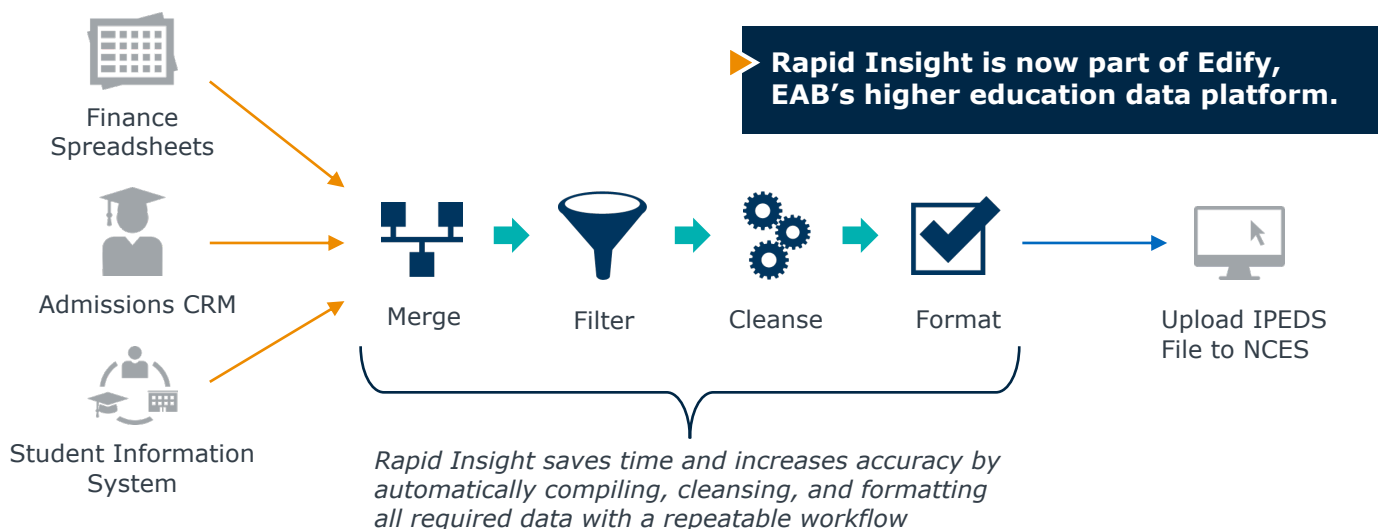
2
Staff members with added capacity for other projects
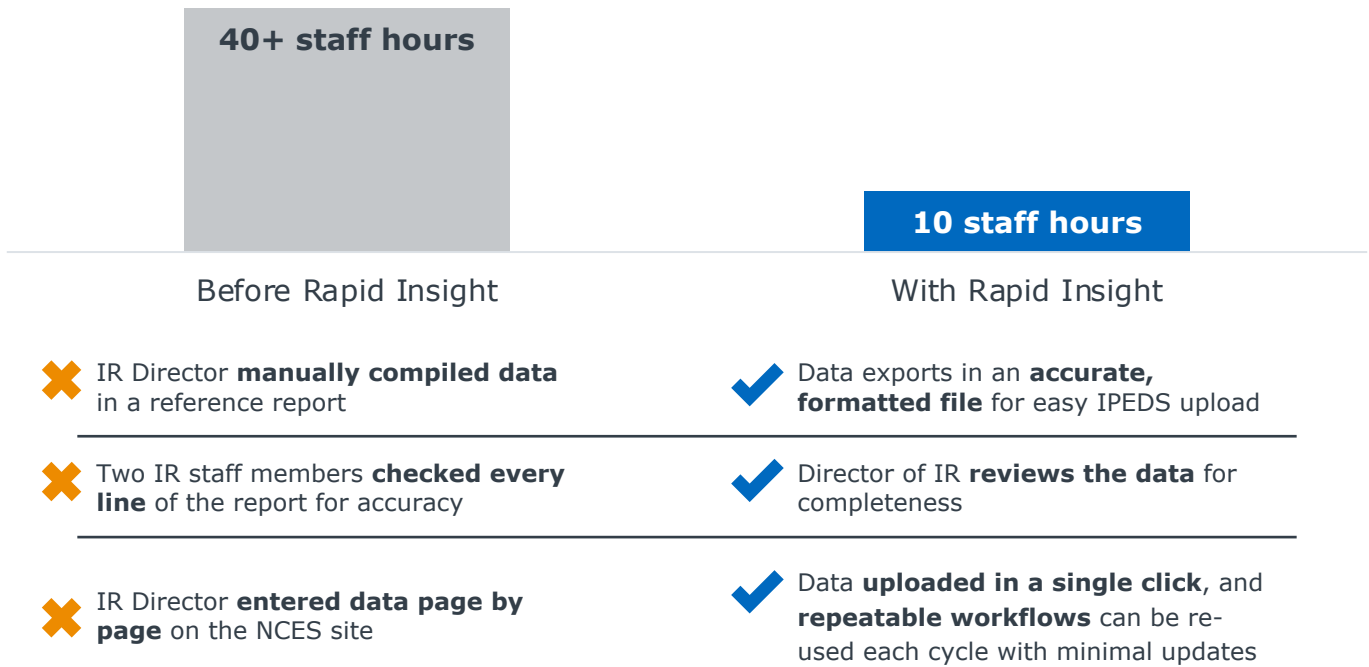
30
Hours saved on data entry and validation

Automated Workflows Accelerate IPEDS Data Gathering and Formatting

Rapid Insight Compiles Campus Data and Outputs a Formatted File for Upload

Finance Spreadsheets

Admissions CRM

Student Information System

Merge → Filter → Cleanse → Format → Upload IPEDS File to NCES

Rapid Insight is now part of Edify, EAB's higher education data platform.

Rapid Insight saves time and increases accuracy by automatically compiling, cleansing, and formatting all required data with a repeatable workflow

IPEDS Reporting at MSMU: Before and After Rapid Insight

Staff Hours Required for IPEDS Completion Report

40+ staff hours

Before Rapid Insight

10 staff hours

With Rapid Insight

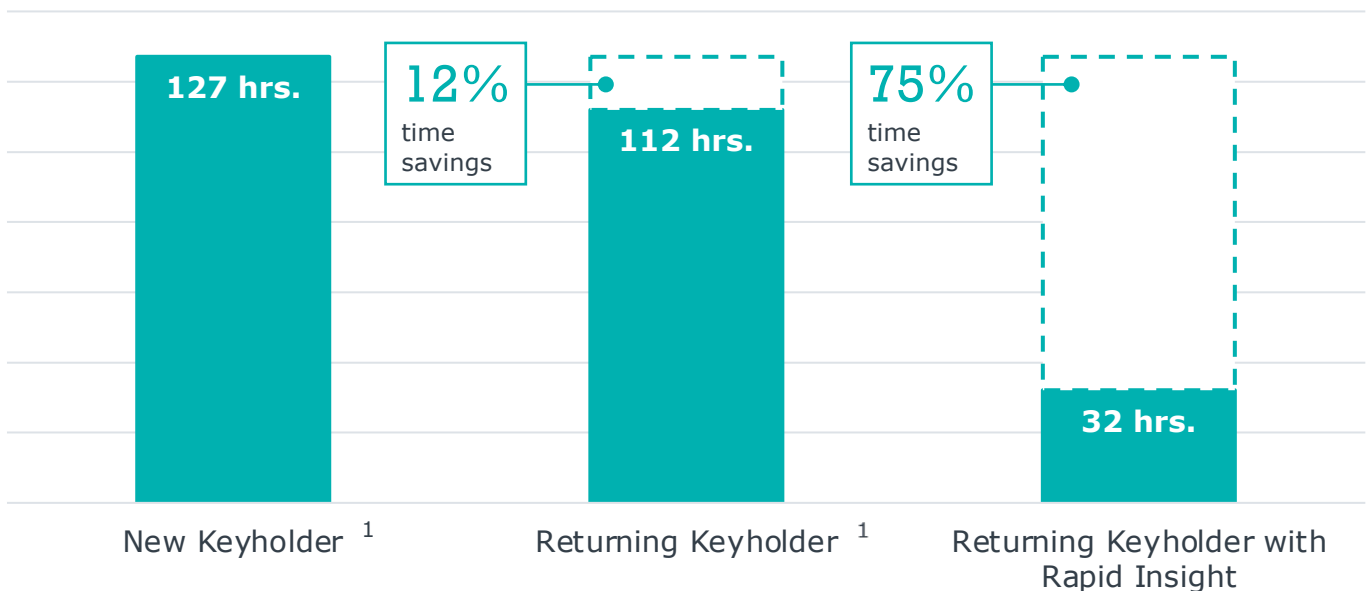|	
❌ IR Director **manually compiled data** in a reference report	✅ Data exports in an **accurate, formatted file** for easy IPEDS upload
❌ Two IR staff members **checked every line** of the report for accuracy	✅ Director of IR **reviews the data** for completeness
❌ IR Director **entered data page by page** on the NCES site	✅ Data **uploaded in a single click**, and **repeatable workflows** can be re-used each cycle with minimal updates

> "Rapid Insight significantly reduced the time for manual entry and verification."
>
> *Maria Narvaez, Director of Institutional Research & Planning*

Rapid Insight Drives Significant IPEDS Submission Time Reduction

Experience Quickens the IPEDS Process, but Pairing Experience with Rapid Insight Drastically Reduces Burden

Total Annual Keyholder Time Commitment for IPEDS Reporting

127 hrs. New Keyholder [1]

12% time savings

112 hrs. Returning Keyholder [1]

75% time savings

32 hrs. Returning Keyholder with Rapid Insight

[1]Source: *National Center for Education Statistics*

Activating Institutional Data Across a Community College System with Rapid Insight

The Community College System of New Hampshire

This case study discusses ● Enrollment and revenue growth   ● Student success and experience

- **About:** The Community College System of New Hampshire (CCSNH) is a network of seven community colleges serving 26,000 students.

- **Challenge:** CCSNH sought to foster efficiency in several departments, including the Registrar, Advising, and Admissions offices, by improving access to pivotal decision-informing data. Data reports were manual and static, costing valuable Institutional Research (IR) staff time to generate and distribute. With a small IR team across the System, hundreds of employees to serve, and varying levels of user expertise, CCSNH needed an intuitive tool that would grant employees direct access to actionable data.

- **Solution:** CCSNH implemented Rapid Insight's cloud-based dashboards in 2019, granting easy data access to employees across the system. Personalized dashboards allow users to prioritize work and make informed decisions. As a result, Institutional Researchers at the colleges can reclaim time for important strategic priorities.

- **Impact:** CCSNH can make informed decisions at all levels of the organization, from strategic planning to individual student assistance. Live, up-to-date dashboards provide academic counselors with lists of students who need assistance, enabling responsive and impactful support. Administrators use Rapid Insight to identify programs with strong term-to-term persistence, sharing out best practices to improve retention in other programs. The resulting improvements in graduation rates and equity contributed to the selection of White Mountains Community College (a CCSNH campus) as a semifinalist for a 2023 Aspen Award for Community College Excellence.

Impact Highlights

+5%
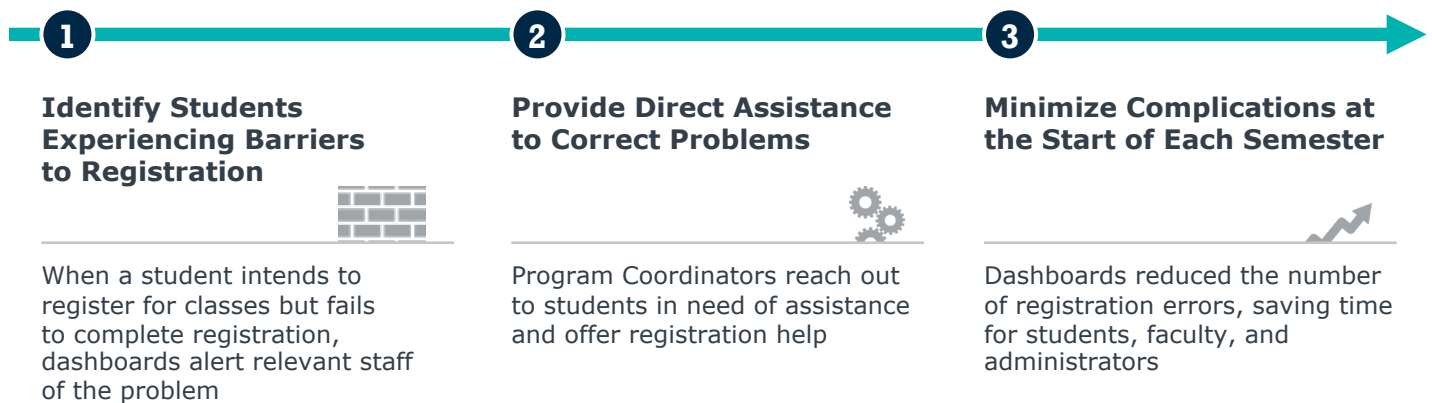Increase in fall-to-spring persistence at one campus

"
The more people we empower to delve into the data, the better we're going to be as an organization."

—Scott Fields, Chief Operating Officer

Identifying and Correcting Registration Errors

Dashboards Enable High-Touch Assistance

1 **Identify Students Experiencing Barriers to Registration**

When a student intends to register for classes but fails to complete registration, dashboards alert relevant staff of the problem

2 **Provide Direct Assistance to Correct Problems**

Program Coordinators reach out to students in need of assistance and offer registration help

3 **Minimize Complications at the Start of Each Semester**

Dashboards reduced the number of registration errors, saving time for students, faculty, and administrators

eab.com

Data Dashboards Increase IR Capacity at White Mountains Community College

BEFORE

Staff Request New Data

Ongoing report request cycle is time-consuming and repetitive

Staff Conduct Outreach

Staff connect with students based on the most recent version of a persistence and registration report, then request a new report when the data becomes dated
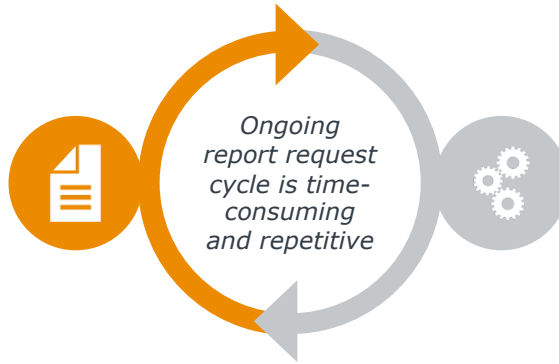
IR Generates Report

Institutional Researchers generate a static registration and persistence report reflecting the most recent data

IR Delivers Report

AFTER

Staff Request Data

Staff request persistence and registration information from IR

Dashboard Updates Automatically

Dashboards refresh to provide users with live, up-to-date information

+5%
Increase in fall-to-spring retention at WMCC

IR Generates Dashboard

IR creates a personalized Rapid Insight dashboard displaying program-level persistence and registration status on each student

Results Improve

Staff have live lists displaying which students need help, enabling faster and more impactful interventions

Combining EAB's Navigate and Rapid Insight

Extending the Impact of Both Tools for Increased Student Success

▶ EAB acquired Rapid Insight in 2021. As users of Rapid Insight and Navigate, EAB's Student Success Management System, CCSNH is excited to coordinate their use of both platforms to further their student success initiatives.

Rapid Insight

Democratized Data Access

- Customized data dashboards
- Institution-wide insight sharing
- Actionable, trustworthy information

CCSNH

Navigate

Student Success Management

- Integrated student success analytics
- Student-centric communications
- Coordinated, holistic student support

> " We really have the ability to leverage [Navigate and Rapid Insight] across the two platforms to make some impressive changes in the future… . We're going to be able to tap into metrics that we haven't been able to get our arms around in the past.''
>
> -Scott Fields, Chief Operating Officer, CCSNH

Data Management for Higher Ed

Your Path to a Data-Informed Campus

Today's complex decisions require increasingly nuanced data and analysis. Mounting pressures highlight the need for data and technology to deliver value and drive change. But too often, data is stored in disparate systems, and questions pile up faster than you can answer them. How could you accelerate progress on your most important initiatives if your data was ready to answer questions as they arose?

OUR SOLUTION

Edify pairs powerful data warehousing technology with direct-to-user analytics tools in one single solution to activate your data for the decisions that matter.

Bring your **data together**

Build a culture of **data confidence**

Empower your school with **insight**

Access, Warehousing, and Integration	*Data Governance*	*Reporting and Analytics*
Cloud-native, secure, infinitely scalable data lake and warehouse to support critical initiatives	Higher ed best-practice rules and validations to ensure a single source of truth	Self-service, custom, and pre-built analytics to drive efficiency and support decision-making

Extend Your Team's Capacity

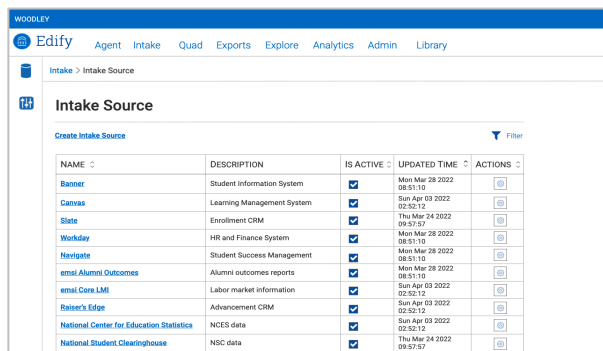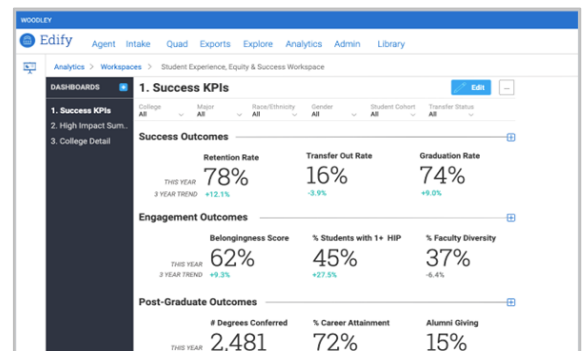| *NEW:* AI	Professional Services
Interact with Edify in plain language to find, access, and report on trusted data in minutes	Work with experienced higher education data experts who understand your environment and goals

Accelerate progress on your most important priorities.

Edify includes a cloud-native, secure, infinitely scalable data lake and data warehouse to support critical institutional data initiatives.

Edify's self-service, custom, and pre-built analytics drive efficiency and support your institution's decision-making.
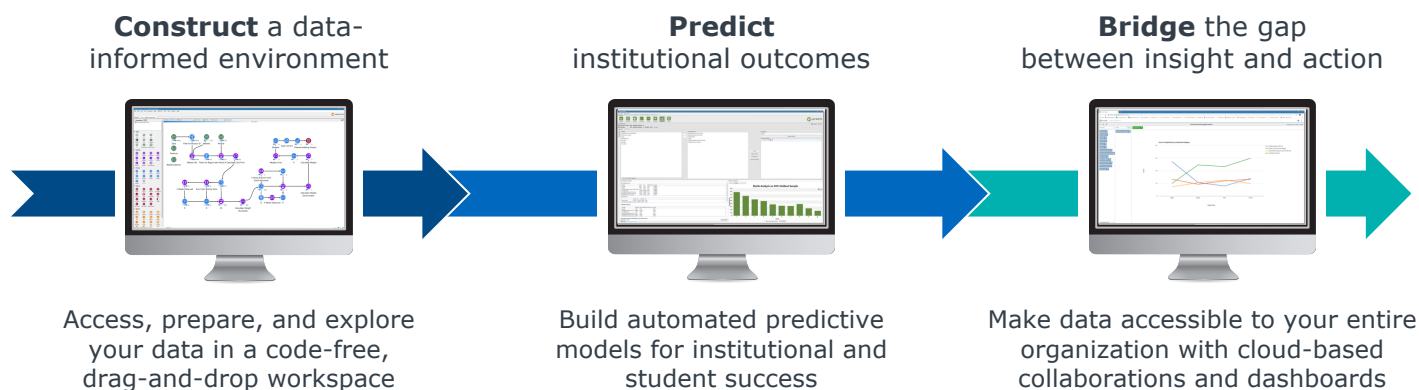
Learn more and request a demo at **eab.com/Edify**.

Data in Decision-Makers' Hands

Self-service Analytics to Move from Data to Action

Too often, access and capacity issues keep staff from using data to make fast and effective decisions. Rapid Insight puts reliable data in decision-makers' hands with simplified predictive modeling, a code-free data workspace, and cloud-based dashboards. Empower users across your institution—from IR teams to advisors to the registrar's office—to analyze and quickly act on campus data with Rapid Insight.

Rapid Insight functionality now embedded in Edify

Construct a data-informed environment

Predict institutional outcomes

Bridge the gap between insight and action

Access, prepare, and explore your data in a code-free, drag-and-drop workspace

Build automated predictive models for institutional and student success

Make data accessible to your entire organization with cloud-based collaborations and dashboards

COMPILE & ANALYZE DATA FROM:

- SIS, CRM, LMS
- Databases and data warehouses
- Text files and spreadsheets

BUILD MODELS FOR:

- Admission and enrollment
- Student success
- Institutional research
- Advancement
- And more

EXPORT DATA TO:

- Tableau
- Excel and text files
- Rapid Insight Bridge
- Databases
- Reports

Achieve Institutional Goals with Confidence and Speed

Admissions and Enrollment
- Forecast class size
- Predict likelihood to apply and enroll

Student Support
Predict retention likelihood and on-time completion

Institutional Research
Speed up operational reporting (e.g., IPEDS, regional accreditation)

Human Resources
Perform a compensation equity analysis

Registrar's Office
Automate census audit and end-of-term grade reports

Advancement
- Predict annual fund participation
- Analyze lapsed donors

Learn more and request a demo at **eab.com/RapidInsight**.

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.