



POSITION DESCRIPTION

Department: Institutional Planning & Analysis
Working Title: Institutional Research Associate
Job Code: 5680
Time Base: 0.5
Position Number: 00005091
Union / Unit (if applicable): CSUEU/9

Position Reports To: Senior Director
Classification: Research Technician III
Range Code: 1
Exempt or Non-Exempt: Exempt
Last Update: 4/30/24
Worksite Options: Hybrid (onsite/remote)

PURPOSE OF POSITION:

The Institutional Research Associate will facilitate data collection, assessment, and evaluation for assigned programs and initiatives (including but not limited to the *Alliance to Accelerate Excellence in Education* and *Pathways to Careers*). The incumbent works closely with colleagues and stakeholders to conduct extensive inquiry and analysis, provide expert recommendations, and produce timely reports on program and university impact. This includes the design and development of detailed study plans, collection and synthesis of quantitative and qualitative data, and presentation of findings to inform institutional planning, evaluation, and decision-making. In addition to knowledge of institutional data (application, enrollment, retention, etc.) the Institutional Research Associate is expected to develop and maintain specialized expertise in the collection, analysis, and application of career readiness, labor market, and economic impact data as relevant to assigned project areas.

MAJOR RESPONSIBILITIES:

| | <u>% of Time</u> |
|--------------------------------------|------------------|
| 1. Assessment & evaluation | 40% |
| 2. Institutional research & analysis | 50% |
| 3. Campus & department service | 10% |

LIST OF TASKS FOR EACH MAJOR RESPONSIBILITY:

1. Assessment & evaluation
 - a. Facilitate assessment planning sessions with program staff to document goals and articulate outcomes to be tracked for program impact.
 - b. Collaborate with program staff to develop logic models, assessment plans, and standard operating procedures to support program assessment and evaluation.
 - c. Develop and document data collection methods to track program participation, milestones, and metrics.
 - d. Design, administer, and report on the results of student surveys relevant to assigned project areas.
 - e. Identify opportunities for process improvement in the collection, analysis, and use of program data.
 - f. Coordinate with other campus departments and functional areas to collect and share relevant institutional data.

2. Institutional research & analysis
 - a. Extract information from national, state, CSU system, and campus databases and systems to inform program strategy and operations, grants and funding opportunities, program assessment and evaluation, etc.
 - b. Apply standard quantitative research methodologies and statistical analysis techniques (e.g., frequencies, crosstabulation, hypothesis testing) as appropriate.
 - c. Design and maintain dashboards to curate, visualize, and share relevant data with internal and external audiences.
 - d. Proactively consult with stakeholders to clarify reporting needs and requirements, advise on available data resources and limitations, and provide customer service.
 - e. Provides narrative reports and graphical representations of data for consumption by university leadership, faculty and staff, community and philanthropic partners.
 - f. Manage, secure, and provide data in accordance with applicable information security, privacy, and data governance policies and regulations.

3. Campus and department service
 - a. Maintain awareness of campus and systemwide initiatives, policies, and practices, as well as relevant national and local issues as they relate to the IP&A mission.
 - b. Actively participate in staff meetings and events, contribute to departmental strategic planning, and follow applicable department and university procedures.

- c. Represent departmental interests and provide assessment and analytic expertise on campus and/or community committees, work groups, and meetings as appropriate to assigned project areas.
- d. Engage in relevant professional development opportunities to maintain knowledge and skills in institutional research and assessment in higher education.

PROVIDES LEAD DIRECTION OF OTHERS

Undergraduate and graduate student assistants on specific projects

REQUIREMENTS OF POSITION:

1. List education and experience required

- Bachelor's degree in social and behavioral sciences, economics, education, mathematics, statistics, public or business administration or related field plus at least three years of years of progressively responsible experience in educational research, institutional research, educational assessment, program evaluation, or similar; or an equivalent combination of education and experience.
- Graduate study in social and behavioral sciences, economics, education, mathematics, statistics, or related field may be substituted for up to one year of required experience.
- Preferences:
 - *Master's degree in related field preferred.*
 - *Professional experience in higher education preferred.*

2. List knowledge, skills, and abilities required for this position.

- Awareness and appreciation of the cultural diversity of the university community, and ability to establish and maintain cooperative and effective relations with university employees, students and the public
- Significant professional experience managing complex data collection, validation and analysis projects
- Thorough knowledge of descriptive and inferential statistics, including correlation, trend analysis, frequency distribution analysis, sampling techniques, hypothesis and significance testing
- Experience working with sensitive data including personally identifiable information, and ability to maintain strict confidentiality
- Thorough knowledge of both qualitative and quantitative research methods and the ability to conduct rigorous, replicable investigations with independent planning, organizing, and coordinating
- Ability to maintain strict confidentiality and adhere to campus and systemwide policy when working with personally identifiable information.
- Experience using Qualtrics, SurveyGizmo, or equivalent software to design online questionnaires and other survey instruments in order to gather and analyze data about human behavior, perceptions, and knowledge
- General knowledge of relational database principles
- Proficiency in using Excel, Tableau, Power BI or equivalent software applications to manage, analyze, and prepare data for inclusion in reports and presentations
- Proficiency in SPSS, R, or other similar statistical programming packages
- Familiarity with data visualization techniques to create graphs, charts, infographics, and dashboards
- Strong oral communication skills to present data to internal and external stakeholders
- Strong interpersonal communication skills in order to manage projects and establish and maintain collaborative working relationships with colleagues in other campus offices and departments
- Ability to write clearly and concisely to prepare reports for non-technical audiences
- Ability to reason logically, think creatively, and exercise sound judgment and decision-making in finding solutions to business problems
- Ability to work independently, exercise initiative, and establish priorities
- Ability to work effectively as a member of a work team
- Significant experience working with and communicating data to stakeholders with varying levels of data and research understanding/experience
- Familiarity with the principles of personnel management and effective supervision and ability to direct the work of others on assigned projects
- Ability to anticipate, identify and manage appropriate human and technological resources

Preferred:

- *Knowledge of theory and methods related to institutional effectiveness, assessment, program evaluation, and performance measurement in institutions of higher education*
- *Experience with student information systems (e.g., PeopleSoft campus solutions)*

- *Experience working with labor market and economic impact data*
- *Experience with grant-funded program evaluation and reporting*

3. List machines, tools, equipment, and motor vehicles used in the performance of the duties

- Standard office and telecommunications equipment (computer, mouse, keyboard, copier, phone, headset)

4. Unique working conditions

- This position is expected to work a hybrid schedule, with some work performed at the San Marcos campus and some work performed remotely/from a home office. Fully remote work will be considered, but ability to attend occasional in-person meetings and events may be required.
- The position is part-time (20 hours per week) and work hours are expected to fall between 7:30am and 5:30pm Pacific Standard Time, Monday through Friday.
- Evening and weekend hours may be required and will be specified only by the supervisor to meet operational needs. Occasional overnight travel to meetings, conferences, or other events may be required.

5. Other Employment Requirements

- This position is subject to a background check including, but not limited to, employment verification, education verification, reference checks and criminal record checks. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for the position.
- Must participate in required campus trainings including, but not limited to, Data Security and FERPA (Level 1), Information Security Awareness Training, and Sexual Violence Prevention (Title IX) training.

PURPOSE AND NATURE OF WORK RELATIONSHIPS:

Define working relationships with people on and off campus (other than supervisor or people supervised) with whom this employee interacts on a continuing basis, and how often this interaction occurs.

| Name/Title | Frequency | Purpose |
|--|----------------------|--|
| IP&A Staff | Daily | Coordinate departmental efforts; plan and carry out research and data projects |
| IP&A Student Assistants | As needed | Supervise work in support of data collection and reporting efforts |
| Enrollment Management Staff | Monthly or as needed | Support ongoing planning, assessment, and reporting for Alliance to Accelerate Excellence in Education |
| Accelerated Pathways to Careers Grant Team | Monthly or as needed | Support ongoing planning, assessment, and reporting for Accelerated Pathways to Careers initiative |
| Other Faculty, Staff, and Administration | As needed | Collaborate and consult on the collection, interpretation, and use of data for assigned projects |

PHYSICAL EFFORT:

Check the appropriate box for each of the following items which most accurately describes the extent of the specific activity performed by this employee on a daily basis.

PHYSICAL EFFORT

Number of hours/day
N/A 1-2 3-4 5-6 7+

- 1. Sitting
- 2. Standing
- 3. Walking
- 4. Bending (neck)
- 4. Bending (waist)
- 6. Twisting (neck)
- 7. Twisting (waist)
- 8. Crawling
- 9. Climbing
- 10. Reaching (above shoulder)
- 11. Reaching (below shoulder)
- 12. Walking on uneven ground
- 13. Crouching
- 14. Kneeling
- 15. Balancing
- 16. Pushing or pulling

| | N/A | 1-2 | 3-4 | 5-6 | 7+ |
|---|-----|-----|-----|-----|----|
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Number of hours/day
N/A 1-2 3-4 5-6 7+

- 17. Fine manipulation
- 18. Simple grasping
- 19. Power grasping
- 20. Lifting or carrying
 - A. 10 lbs or less
 - B. 11 to 25 lbs
 - C. 26 to 50 lbs
 - D. 51 to 75 lbs
 - E. 76 to 100 lbs
 - F. Over 100 lbs
- 21. Keyboard use
- 22. Mouse use
- 23. Repetitive use of hands/arms
- 24. Repetitive use of legs/feet
- 25. Eye/hand coordination

| | N/A | 1-2 | 3-4 | 5-6 | 7+ |
|---|-----|-----|-----|-----|----|
| X | | | | | |
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| X | | | | | |

- 26. Driving cars, trucks, forklifts and other equipment
- 27. Being around scientific equipment and machinery

| Yes | No |
|-----|----|
| | X |
| | X |

MENTAL EFFORT

Number of hours/day
N/A 1-2 3-4 5-6 7+

- 1. Directing others
- 2. Writing
- 3. Using math/calculations
- 4. Talking
- 5. Working at various tempos
- 6. Concentrating amid distractions
- 7. Remembering names
- 8. Remembering details
- 9. Making decisions
- 10. Working rapidly
- 11. Examining/observing details
- 12. Discriminating colors

| | N/A | 1-2 | 3-4 | 5-6 | 7+ |
|--|-----|-----|-----|-----|----|
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ENVIRONMENTAL FACTORS

Number of hours/day
N/A 1-2 3-4 5-6 7+

- 1. Inside
- 2. Outside
- 3. Humid
- 4. Hazards
- 5. High places
- 6. Hot
- 7. Cold
- 8. Dry
- 9. Wet
- 10. Extreme change of temp
- 11. Dirty/dusty
- 12. Exposure to gas, fumes or chemicals
- 13. Odors
- 14. Noisy
- 15. Working w/others
- 16. Working around others
- 17. Working alone

| | N/A | 1-2 | 3-4 | 5-6 | 7+ |
|---|-----|-----|-----|-----|----|
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SIGNATURES

The last sheet for any staff position description should contain the signature sheet. Signatures will include the incumbent's signature (if applicable) or new employee; the supervisor's signature and all pertinent administrative personnel.

Employee

Print Name: _____

Signature: _____

Date: _____

Appropriate Administrator (MPP)

Print Name: _____

Signature: _____

Date: _____

Dean/Department Head/Director/AVP (optional)

Print Name: _____

Signature: _____

Date: _____