Implementing the Data Cookbook at UCF

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FAIR 2020
Implementing the Data Cookbook at UCF

1. UCF Needs
2. Data Cookbook
3. Getting Started
4. Maintenance
5. Uses
6. Collaborators
7. Future Plans
UCF Needs: Why did we need help?

Business Needs at UCF

- **Document** data terminology
- **Communicate** business processes
- **Standardize** definitions across campus
- **Link** definitions to reports
- **Share** technical information
- **Self-serve** resource
UCF Needs: Common Questions

Where does that number come from?

What is an FTIC?

How is that defined for PBF?

How is that value calculated?

What metric is this included in?
IData is a leading data management firm for higher education. They provide consulting services as well as a line of innovative data management software products.

Their mission is helping higher education institutions be successful through effective data management and innovative technology.

The Data Cookbook is a collection of shared terminology that has been entered and reviewed via workflows which can be accessed by all employees at UCF.
Benefits of the Data Cookbook

- Part of a data governance plan
- Comprehensive data dictionary
- Terminology standardization across UCF
- Access to externally sourced definitions (IPEDS, CDS, etc.)
- Searchable report specifications
- Links in reporting tools/dashboards
**Data Cookbook Organization**

Collections, Specifications & Definitions

**Collection:** Group of specifications with a similar theme

- **Specification:** Report 1
  - Definition
  - Definition
  - Definition

- **Specification:** Report 2
  - Definition
  - Definition
  - Definition

- **Specification:** Report 3
  - Definition
  - Definition
  - Definition
Data Cookbook User Groups

Data Steward
- Data owner
- First to create definitions
- Writes functional definition
- Makes edits as necessary

Technical Editor
- Department IT
- Adds to the technical definition:
  - Location
  - Related code
  - Nuances of data

Consumer
- Gets a better understanding of specifications and/or definitions
- Learns new terminology
3 Getting Started

STEP 1: collect definitions

STEP 2: training with DC staff

STEP 3: add definitions to DC

STEP 4: start over w/ specifications first
Workflow

Department Definition Approval
Data Cookbook Team
(8 members of IKM staff)

• Meets on Fridays
• Reviews new items
• Updates existing items (new version)
• Plans for future development
5 Uses: Data Glossary

Access it on the IKM website: ikm.ucf.edu

https://ikm.ucf.edu/resources/data-glossary/
## Performance Based Funding Metrics 2018-19

### 1. Percent of bachelor’s graduates employed ($26,000+) and/or continuing their education 1 yr after graduation (2015-16)

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</thead>
<tbody>
<tr>
<td></td>
<td>52.3%</td>
<td>54.6%</td>
<td>59.9%</td>
<td>59.2%</td>
<td>61.4%</td>
<td>63.7%</td>
<td>66.0%</td>
<td>68.3%</td>
<td>70.5%</td>
<td>72.8%</td>
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### 2. Median wages of bachelor’s graduates employed full-time 1 yr after graduation (2015-16)

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<tbody>
<tr>
<td>1</td>
<td>$18,200</td>
<td>$20,700</td>
<td>$23,200</td>
<td>$25,700</td>
<td>$28,200</td>
<td>$30,700</td>
<td>$33,200</td>
<td>$35,700</td>
<td>$38,200</td>
<td>$40,700</td>
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### 3. Net tuition and fees per 120 credit hours (2015-17)

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<tr>
<td>1</td>
<td>$18,000</td>
<td>$17,000</td>
<td>$16,000</td>
<td>$15,000</td>
<td>$14,000</td>
<td>$13,000</td>
<td>$12,000</td>
<td>$11,000</td>
<td>$10,000</td>
<td>$9,000</td>
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### 4. Four year graduation rate (full-time) (2013-17)

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<tbody>
<tr>
<td>1</td>
<td>38.8%</td>
<td>40.0%</td>
<td>41.3%</td>
<td>42.5%</td>
<td>43.8%</td>
<td>45.0%</td>
<td>46.3%</td>
<td>47.5%</td>
<td>48.8%</td>
<td>50.0%</td>
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### 5. Academic progress rate (2nd year retention with GPA above 2.0) (2016-17)

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<tbody>
<tr>
<td>1</td>
<td>78.8%</td>
<td>80.0%</td>
<td>81.3%</td>
<td>82.6%</td>
<td>83.8%</td>
<td>85.6%</td>
<td>86.8%</td>
<td>87.8%</td>
<td>88.8%</td>
<td>90.0%</td>
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**Purpose**

The PBF model for the State University System (SUS) works by awarding funds to Florida universities based on their performance in several predetermined metrics.

**Description**

The 2018-19 PBF model includes 10 metrics that evaluate Florida Institutions on a range of measures. 1. Percent of bachelor’s graduates enrolled or employed ($25,000+). 2. Median wages of bachelor’s graduates employed full-time. 3. Net tuition and fees per 120 credit hours. 4. 4 year graduation rate. 5. Academic progress rate. 6. Bachelor’s degrees awarded in programs of strategic emphasis. 7. University access rate. 8. Graduate degrees awarded in programs of strategic emphasis. 9. Percent of bachelor’s degrees without excess hours. 10. Number of bachelor’s degrees awarded annually.

**Access Details**

5 Uses: Specification & Definitions

https://ikm.ucf.edu/facts/interactive-facts/fetpip/
Collaborators

Targeted UCF offices:
- Financial Aid
- Center for Distributed Learning
- Office of Student Success

Gives them ability to write their own definitions

Training time involved
Collaborators: User Guides
7 Future Plans: Technical Details

Financial Aid Applicant
Created 9 months ago by Scott Fion
Modified 3 months ago by Scott Fion

This term has no approved versions. Showing the latest version.

Functional definition:
A person becomes a financial aid applicant for a particular academic year when Loyola has received an ISIR record and a CSS PROFILE record.
Loyola will use import processes in Colleague to bring these records into the system. A person becomes a financial aid applicant on the earliest date that both of these records have been imported into the system.

This person may or may not be an accepted undergraduate student. They are still counted as a Financial Aid Applicant.

Technical definitions:

Technical definition
Data System: Datatel Colleague Time Context: Financial Aid Year Related

ISIR and PROFILE records are imported into Colleague into the ISIR.FAFSA file regularly. They populate the ISIR.FAFSA file which contains a IFAF.ISIR.TYPE field indicating the type of record imported.

IFAF.ISIR.TYPE = 'ISIR' - this is for actual ISIR records
IFAF.ISIR.TYPE = 'PROFILE' - this is for CSS PROFILE records

There are other types, but to identify an FA Applicant, we only need those two.

To calculate applicants for a given year, you will need to check for:
IFAF.IMPORT.YEAR = (the given year, like 2011).

use the ISIR.FAFSA.ADDDATE to indicate the date Loyola imported this.

So an applicant is one who has BOTH an ISIR and a PROFILE type record for this current FAFSA.IMPORT.YEAR.

Multiple ISIRS or PROFILES can exist for a student for a year, so we will need to determine the earliest date we received each of those, and then take the later of those two dates to determine the date in which they became an applicant.

Technical definition
Data System: ODS Production Time Context: Financial Aid Year Related

The following select will give you a result set showing the student ID, the year, and the date they became an applicant. If they were not an applicant in that year, they will not appear in this result.
So, this select will only show FA applicants and the date and year they became an FA applicant.

ODS_ISIR_FAFSA is a view in ODS of the PREP.ISIR_FAFSA table, which is a target transform of ISIR.FAFSA.

select IFAF.STUDENT_ID, IFAF.IMPORT.YEAR, AppDate
from
  select IFAF.STUDENT_ID, IFAF.IMPORT.YEAR, COUNT(IFAF.ISIR.TYPE) as 'Apps',
  MAX(MIN(AppDate)) as 'AppDate'
  from
    selectolf.IFAP.ISIR.TYPE, min(olf.ISIR.FAFSA.ADDDATE) as 'MINDATE'
    from ODS.ISIR.FAFSA olf
    where olf.ISIR.ISIR_TYPE = 'ISIR'
    group by olf.IFAP.STUDENT_ID, olf.IFAP.IMPORT.YEAR,
    olf.IFAP.ISIR_TYPE
    UNION
    select olf.IFAP.STUDENT_ID, olf.IFAP.IMPORT.YEAR,
    olf.IFAP.ISIR_TYPE, min(olf.ISIR.FAFSA.ADDDATE) as 'MINDATE'
    from ODS.ISIR.FAFSA olf
    where olf.ISIR.ISIR_TYPE = 'PROFILE'
    group by olf.IFAP.STUDENT_ID, olf.IFAP.IMPORT.YEAR,
    olf.IFAP.ISIR_TYPE
  ) min_app
  group by IFAP.STUDENT_ID, IFAP.IMPORT_YEAR
  ) max_date
where Apps = 2

Technical definition
Data System: Universe: Colleague FA Dashboard R1 Time Context: Financial Aid Year Related

Class: FA Applicant
Object: "FA Applicant ID" - the student ID
Object: "FA Applicant Year" - the year they were an applicant
Object: "FA Applicant Date" - the date they became an applicant

The derived table "LST_FA_APPLICANTS" uses the query from the ODS tables (provided in the ODS technical definition) to provide the FA applicants, the year and date they became applicants.
Questions?

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