Partnership for a Data-Rich Organization:

HOW HELIOCAMPUS HELPED ST. EDWARD'S UNIVERSITY PROVIDE DATA-INFORMED INSIGHTS TO USERS IN A SCALABLE WAY

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St. Edward's University wanted to up their data game. Becoming a data-driven organization capable of making informed decisions around student outcomes, campus resources, financial aid, and returns on education meant moving beyond a once-a-year snapshot of their student population. To make their vision a reality, they needed a way to make data from multiple sources usable and meaningful to a variety of users with different needs, and they needed their solution to be scalable.

Justin Sloan, Chief Data Officer and Vice President of Institutional Effectiveness and Planning for St. Edward's University (SEU), doesn't mince words.

"Any institution that doesn't know how many students they have on campus at the start of the spring semester, or that needs more than 24 hours to answer that question, is in a tough spot."

And that, he says, is exactly where St. Edward's was in the spring of 2016.

The Search for a Human-Centered Solution

Before you can find an answer, you need to know exactly was is wrong. To find out, Sloan and his team surveyed faculty and staff and identified two primary barriers relating to accessing and using institutional data:

› **NTMA ("Nobody Tells Me Anything")** – Faculty had an expectation around receiving information and wanted a self-service way to access data.

› **IDKWTA ("I Don't Know Who To Ask")** – Information had become very siloed and compartmentalized, with no one knowing how or where to access it.

Interestingly, Sloan realized, neither of these obstacles related to the quality of the data itself; it appeared that access, usability, and human networking mattered as much as the technology product itself. Using this new knowledge, Sloan and his team created what they called the three Ps to describe the characteristics of SEU's ideal tech solution: people, process, and product. The perfect vendor would be able to address all three needs.

Using the "3-P" framework, his team then built out an RFI explaining their specific vendor requirements, including:

› Enterprise reporting & visualization capabilities

› An enterprise data repository to collect information from multiple sources

› Self-service capability for a diverse group of users

› The ability to scale with the institution, to help St. Edward's increase capacity and competency as needed

Sloan sent out the RFI to more than 20 business intelligence and data technology providers and began to evaluate the responses.

The Fourth P: Partnership

According to Sloan, "Every vendor said they could do it all." Months of review, however, revealed otherwise. "There were plenty of pure tech providers that could easily handle the first two bullets [in the list]," he says, "but it was a mixed bag with the third: a self-service solution that could be used by anyone, not just data scientists."

The final item, scalability, proved even more problematic. After a long review process, including campus visits and demonstrations by multiple vendors, St. Edward's found their solution. The answer to their data dilemma was not, it turned out, that third P, product. It was a fourth P: partnership.

With Tableau as its visualization solution, HelioCampus easily met the reporting, visualization, data repository and platform needs of St. Edwards, as well as their usability standards. But beyond product use, HelioCampus also offered a unique partnership built on their deep expertise in higher education. "It was," says Sloan, "a partnership much deeper and more valuable than just a product and a model."

Notable benefits of this partnership have included sets of dashboards that serve as samples of how SEU might use data, as well as education on how they might best use those extracts. "It was a jump start that helped us make a quick progression," Sloan says.

"From the beginning, HelioCampus worked closely with our institutional effectiveness and planning team to ensure that the implementation of the data platform supported our existing data structure. They met us where we were, instead of forcing us into a new or cookie-cutter structure."

Even better, HelioCampus' partnership has augmented the university's internal data science and dashboard development team so that no additional resources were needed. "Our institutional effectiveness and planning budget has not increased," Sloan notes. "In fact, it has gone the other way while increasing our capacity."

The Four Ps

HelioCampus helped St. Edwards satisfy more than just product alone:

1 **People** – Understanding what would be needed by users to move everyone towards an information-driven culture.

2 **Process** – Determining what processes would be needed to support the users.

3 **Product** – The tool(s) necessary to build out their informational needs. The kind of product would be defined by the first two Ps.

4 **Partnership** – Expertise that augments internal resources, helping implement, educate, train, and deliver.

"We are able to put resources into classrooms and into the infrastructure that support student experiences, not into the database administrator [staff] we would have needed without the help of HelioCampus," Sloan says. "Our resources are now focused on delivering on our mission: the education of the whole person, both the heart and the mind. And that is the most important benefit to this partnership."

Actionable Data – and More Resources

Thanks to their partnership with HelioCampus, SEU has gone from a once-a-year snapshot to knowing exactly where they are going. "We have reduced the number of tools in use and the burden on our people, while improving data quality and focus," says Sloan. He notes that other institutions' data solutions are often fragmented, with disparate systems for HR, finance, learning management, and academics. With HelioCampus, he says, SEU is able to offer actionable, visualized data across all functional areas of the university.

Connect your data dots.
If you would like more information on HelioCampus solutions, **email info@heliocampus.com.**