



Managed Data Checklist

Getting started with advanced analytics that use AI and machine learning and moving your institutional data culture to the next level, doesn't have to be hard. Most likely, you have the information and resources already on campus; it's just knowing where to begin.

Othot has put together a checklist that will help you start your data journey.

You will need:

○ **Clearly defined institutional goals and desire to:**

- Understand students better
- Make more informed decisions about:
 - Engaging students or prospective students with the right interaction/ intervention at the right time
 - Optimizing allocation of financial aid
 - Increasing diversity and access to your institution
 - Improving student retention, persistence, and graduation rates
 - Supporting students with manageable debt
 - Enabling students for post-graduate success

○ **Individuals within the college or university assigned to transform analysis into actions**

While this group may change over time to include advisors, faculty, committee members, etc., it's important to have internal champions that can use the findings to affect positive change

○ **A robust CRM and other rich data sources**

Any data is a great starting point. Ideally you would have:

- Demographic (location, FAFSA information, etc.)
- Academic (high school or existing college/university transcripts)
- Behavioral (extracurricular participation, meal plan participation, etc.)
- Engagement (recruitment participation, counselor interaction, etc.)



- **2 to 3 years of historical data**

- Should have consistent variables and data definitions year-over-year
- Should include both positive and negative outcomes (e.g., enrolled, retained, graduated; did not enroll, did not retain, did not graduate)

- **A point person or persons to serve as contact(s) for data flow, automation, and validation**

The point person varies depending on the data being collected, institutional resources, and budget. Enrollment data might be handled by a data analyst in Admissions. If you're looking at retention, and have focused on housing as a variable, your data person might be part of the Residence Life team. Think through the problem you're trying to solve and identify an appropriate point of contact.

- **A plan to share the analysis with your team which includes secure access and permission levels for each individual**

Additional Resources:

Read more about starting and trusting your data journey at:
<https://www.othot.com/blog/data-trust-journey-covid-19>.

To learn more about how to use the data you have to increase enrollment, improve student success, and leverage financial aid more efficiently, contact Othot at: othotteam@othot.com

ABOUT OTHOT

Othot, a Liaison company, is the leader in artificial intelligence and prescriptive analytics solutions for higher education institutions across the United States. Together, Othot and its partner schools focus on each institution's specific enrollment, student success, and advancement goals. Othot's cloud-based solution provides continuous intelligence in real time and empowers schools to engage each prospective, current, and former student with the right tactic at the right time.

Othot is higher intelligence for higher education.