



# Institutional Unit Annual Review (AUR)

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*Integrated Planning Template - Fall 2025*

**Note:** This process is completed annually by KCCD Office Units. A full review (all sections) is submitted in odd years (e.g., 2025), and an abbreviated update (Sections I, II, III, and VI only) is submitted in even years (e.g., 2026).

**Unit/Department Name:**

Institutional Research and Reporting

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**Review Period:**

2025-2026

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**Prepared By:**

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**Date Submitted:**

November 4, 2025

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## I. Executive Summary & Mission Alignment

**Executive Summary:**

The Institutional Research & Reporting (IRR) department leads districtwide data governance, analytics, and reporting to ensure every decision across Kern CCD is informed by accurate, timely, and equitable information. IRR provides trusted data, actionable insights, and research capacity that strengthen institutional effectiveness, student success, and fiscal accountability.

Over the past year, IRR strengthened Kern CCD's data infrastructure and governance through significant investments in the Invoke Data Warehouse, Argos reporting system, and districtwide data literacy. These initiatives have improved data accuracy, transparency, and accessibility across all colleges. The implementation of governance standards and validation protocols ensures that information used for decision-making is consistent, vetted, and auditable. These

improvements directly supported the on-time submission of all MIS and 320 reports with clean data, maximizing Student-Centered Funding Formula (SCFF) outcomes and reinforcing district compliance with fiscal accountability requirements.

Current priorities focus on finalizing and releasing the districtwide Enrollment Dashboard, deploying and validating 13 new data warehouse tables as a single source of truth, and completing the Employee Wellness Research analysis to inform planning and staff development initiatives. IRR is also leading the transition from Cognos to Argos reporting by June 2026, ensuring that validated data flows seamlessly from the warehouse into reporting tools and dashboards. Concurrently, IRR is advancing a major redesign of the Program Review Dashboard, which will engage faculty and deans through a Joint Application Development (JAD) process to create a user-centered, interactive tool for program assessment.

The scope and complexity of IRR's responsibilities continue to expand, with an average of 5–10 major research projects and 5–10 short-turnaround data requests per month. These workloads, combined with system transitions and governance demands, stretch existing capacity. To sustain performance and prevent burnout in a single-administrator structure, IRR is strategically leveraging consultant support and prioritizing the recruitment of key roles, including an Assistant Director and a Research Analyst III (Program Manager). These positions will stabilize operations, distribute leadership, and ensure timely delivery of critical districtwide projects.

Looking ahead, IRR will focus on completing the Argos implementation, connecting the Invoke Data Warehouse to all Tableau assets, and institutionalizing a districtwide data audit framework to ensure transparency and trust in reporting. Continued investments in governance, staffing, and consultant capacity will ensure that IRR can deliver reliable, validated, and accessible data tools for every college. As the district transitions to a modern, integrated data ecosystem, IRR will continue to lead with a focus on data integrity, equity, and strategic impact — ensuring that Kern CCD remains accountable, innovative, and fiscally sustainable.

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### **Unit Mission Statement:**

The Institutional Research & Reporting (IRR) department transforms data into action by building a culture of evidence, accountability, and equity across Kern CCD. IRR empowers data-informed decision-making through trusted analytics, strong data governance, and applied research that advance student success, institutional effectiveness, and fiscal integrity.

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### **Scope of Services and Key Functions:**

The Institutional Research & Reporting department serves as the district's central hub for data governance, analytics, and institutional effectiveness. IRR provides leadership, coordination, and technical expertise to ensure that data across the district is accurate, accessible, auditable, and actionable.

### **Core Functions:**

**Data Governance and Validation** – Establish and maintain consistent data standards, definitions, and reporting practices across colleges. Validate and maintain data within the Invoke Data Warehouse to ensure a single source of truth for all district reporting and analysis.

**Research, Analytics, and Reporting** – Produce reports and dashboards that support enrollment management, program review, student success, and fiscal accountability.

**Compliance and State Reporting** – Manage the preparation, validation, and submission of state and federal reports (e.g., MIS, 320), ensuring accuracy and timely submission to maximize SCFF outcomes.

**System Integration and Technology Alignment** – Lead the district’s transition from Cognos to Argos reporting by June 2026, and oversee the integration of warehouse tables into Tableau dashboards for unified reporting.

**Strategic Decision Support** – Provide analytic and research support for accreditation, planning, and institutional effectiveness initiatives.

**Capacity Building** – Lead districtwide data literacy initiatives, provide training in Tableau and Argos, and support the professional development of research staff across the district.

**Equity and Organizational Research** – Conduct research projects, such as the Employee Wellness Study and equity analyses, that inform inclusive planning and institutional improvement.

**Primary Service Recipients/Customers:**

The IRR department supports a broad range of internal and external stakeholders across the Kern Community College District.

**Primary Service Recipients:**

**District Leadership and Chancellor’s Cabinet** – Uses IRR data, dashboards, and reports to guide planning, fiscal accountability, and strategic decision-making.

College Presidents, Vice Presidents, and Deans – Access dashboards, validated data, and research support for program review, enrollment management, and accreditation.

College Institutional Research Offices – Collaborate with District IRR on governance standards, shared data definitions, and coordinated reporting processes.

Faculty and Academic Senates – Engage with dashboards and data tools for program evaluation, student learning outcomes, and curriculum planning.

Adult Education Consortium and Regional Partners – Use IRR-developed dashboards to monitor student outcomes and regional performance metrics.

State and Federal Reporting Agencies – Receive validated and compliant submissions of MIS, 320, and other accountability reports.

Indirect Beneficiaries:

Students – Benefit from more effective planning, resource allocation, and interventions that improve access, equity, and success outcomes.

Employees – Benefit from organizational research and data-informed strategies that strengthen workplace culture, wellness, and professional development.

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### **How the Unit Supports Student Success and Equity:**

The Institutional Research & Reporting department advances student success and equity by ensuring that every decision at the district and college level is grounded in accurate, timely, and disaggregated data.

Key Contributions to Student Success and Equity:

**Equitable Data Access:** Develops dashboards such as the Enrollment Dashboard and Adult Education Dashboard that allow colleges to disaggregate and analyze outcomes by race, gender, age, and other demographics.

**Data Integrity and Governance:** Maintains consistent and validated data definitions across the district, ensuring equity metrics are comparable and actionable.

**Evidence-Based Planning:** Supports college equity and student success plans by providing accurate data for goal setting, program review, and resource allocation.

**Capacity Building:** Delivers data literacy training to faculty, staff, and administrators, empowering them to use data responsibly and with an equity lens.

**Accountability and Transparency:** Ensures that MIS and 320 submissions are accurate and reflect the true work of the colleges, protecting funding tied to student success and equity outcomes.

**Research on Institutional Well-Being:** Conducts studies such as the Employee Wellness Research project, which informs initiatives that improve the employee experience and, in turn, the student learning environment.

Through these services, IRR ensures that equity is not an afterthought, but a core design principle in how data is collected, validated, reported, and used to drive continuous improvement districtwide.

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## II. Staffing Profile & Changes

**Current Organizational Chart or Staffing List:**

[IRR Org Chart.pdf](#)

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**Review of Organizational Structure:**

The Institutional Research & Reporting (IRR) department operates as a districtwide service and leadership unit, coordinating research, reporting, and data governance across all three colleges and the District Office. The department's work underpins institutional planning, accountability, and compliance at every level of Kern CCD.

IRR's current structure reflects a collaborative network model rather than a traditional supervisory hierarchy. The Associate Vice Chancellor for Institutional Research & Reporting (AVC IRR) provides strategic leadership and direction for districtwide research priorities, data governance, reporting accuracy, and analytics alignment.

The AVC collaborates closely with the Directors of Institutional Research at each college to coordinate shared data definitions, reporting methodologies, and districtwide dashboards. While the AVC does not directly supervise the college research offices, there is a clear expectation to set the districtwide data strategy, chart the analytic direction, and ensure that governance standards are implemented consistently across the colleges.

This collaborative structure has increased alignment and transparency between the colleges and the District Office, but it also places an unusually broad scope of operational responsibility on a single administrator. As IRR continues to lead system modernization—including the Invoke Data Warehouse, Argos implementation, and Tableau ecosystem integration—this structure has reached capacity. Daily project management, data validation, and development tasks cannot be sustained effectively without mid-level leadership and technical staff support.

### **Notable Staffing Changes:**

To address capacity gaps and ensure long-term sustainability, IRR is proposing to fill two critical positions that have been previously approved but unfilled:

#### **1. Assistant Director of Institutional Research & Reporting**

**Purpose:** The Assistant Director will provide daily supervision of IRR staff, oversee project timelines, and coordinate districtwide governance and reporting activities.

**Function:** This position will serve as the operational lead for day-to-day workflow management, ensuring timely completion of districtwide deliverables and direct support to the AVC on strategic initiatives.

**Impact:** The addition of this role will stabilize operations, enhance accountability, and relieve the single-administrator bottleneck that currently limits efficiency and project throughput.

#### **2. Research Analyst III (Program Manager)**

**Purpose:** This senior analytical role will manage complex projects, such as the redesign of the

Program Review Dashboard, Argos reporting integration, and continued development of the Invoke Data Warehouse.

Function: Serves as project lead and mentor to IR analysts, bridging technical and leadership functions while coordinating cross-college collaboration on shared dashboards and metrics.

Impact: The position creates a professional growth pathway within IRR (Analyst → Program Manager → Assistant Director → AVC) that supports retention and succession planning, while ensuring the timely completion of high-priority districtwide projects.

Both positions are essential for operational sustainability, daily supervision, and the timely completion of high-impact initiatives. They are not duplicative of college roles but fill critical coordination and leadership gaps at the district level.

IRR also requests dedicated workspace for these two hybrid staff members or authorization to hire in a fully remote capacity, maintaining consistency with the district's hybrid operations framework.

## Context and Rationale

Currently, IRR manages more than 20 active districtwide projects in varying stages of development—from “Not Started” to “Near Completion.” These include data validation cycles, dashboard redesigns, governance implementation, and system integrations. Simultaneously, IRR responds to a steady stream of ongoing research requests, averaging 5–10 large projects per month and 5–10 short-turnaround requests (24–48 hours).

As the district transitions from Cognos to Argos by June 2026, and as all existing Tableau dashboards are connected to the Invoke Data Warehouse, the complexity of IRR's workload will continue to grow. These efforts require specialized technical expertise, ongoing collaboration with IT, and clarity regarding ownership and accountability for reporting systems.

Currently, reporting responsibilities are distributed between IT (system infrastructure) and IRR (data integrity, definitions, and analytics). As the district modernizes its reporting tools, a joint governance discussion is needed to clearly define the roles and accountability of IT and IRR. Sustained consultant support and the addition of key IRR positions are critical to ensure project continuity and timely delivery of reliable data tools for the colleges.

## Summary

The IRR department's structure has evolved to meet the increasing complexity of data governance and reporting within Kern CCD. However, the current one-administrator model is unsustainable in the long term. Filling the Assistant Director and Research Analyst III positions will provide the leadership, technical, and operational stability required to maintain districtwide accountability, meet compliance deadlines, and deliver reliable data systems.

These staffing investments, combined with consultant support, will ensure IRR's capacity to continue leading the district's modernization efforts while preserving accuracy, efficiency, and transparency in all reporting functions.

## III. Look Back: Assessment and Gap Analysis

### **Narrative Summary of Major Projects/Initiatives:**

The Institutional Research & Reporting (IRR) department continues to play a critical leadership role in advancing Kern CCD's data governance, institutional accountability, and analytic capacity. The past year marked significant progress in the development of the Invoke Data Warehouse, expansion of data governance standards, and the modernization of districtwide reporting systems, while also revealing critical capacity and resource gaps that must be addressed to complete these foundational projects.

### **Major Projects and Initiatives:**

#### **Invoke Data Warehouse Development (In Progress):**

The Invoke Data Warehouse remains the cornerstone of IRR's work to establish a single, validated source of truth for all district data. Two of the thirteen primary warehouse tables have been fully developed and validated, providing a model for standardized, auditable data structures. The remaining eleven tables are currently in development, pending completion and full validation.

Continued progress on this work depends on consultant funding and dedicated technical support, which are required to accelerate table development, build integration between warehouse data and Tableau dashboards, and connect Argos reports directly to validated data sources. Completion of this project is essential to improving data accuracy, transparency, and trust districtwide.

#### **Transition from Cognos to Argos Reporting (Target: June 2026):**

IRR is coordinating with IT to manage the districtwide transition to Argos reporting, which will replace Cognos as the enterprise reporting tool. While IT maintains system infrastructure, IRR ensures that all Argos reports are sourced from validated data and aligned with governance standards. This transition will allow for cleaner, auditable, and more accessible reporting for all colleges.

#### Program Review Dashboard Redesign:

IRR is preparing to launch a complete redesign of the Program Review Dashboard, which will integrate validated warehouse data and improve interactivity and usability for faculty, deans, and administrators. This project will employ a Joint Application Development (JAD) approach, engaging end users directly in design and testing. Consultant assistance and funding are necessary to ensure timely completion and alignment with the warehouse and Argos infrastructure.

#### Data Governance and Literacy:

IRR has continued to implement a districtwide data governance framework to standardize definitions, improve validation processes, and align data stewardship between colleges, IRR, and IT. Governance efforts are building shared accountability for data integrity and are being paired with data literacy training to strengthen analytic capacity across the district.

#### MIS and 320 Reporting Accuracy:

Despite system transitions and workload challenges, IRR successfully submitted all MIS and 320 reports on time and error-free, ensuring continued compliance and maximizing Student-Centered Funding Formula (SCFF) outcomes.

#### Adult Education Dashboards:

Continued collaboration with regional partners has produced expanded dashboards tracking adult education enrollment, transitions, and outcomes—enhancing transparency and accountability across the consortium.

#### Employee Wellness Research:

IRR completed districtwide analysis of employee wellness data, identifying actionable insights to inform retention and engagement strategies across the district.

These accomplishments highlight IRR's pivotal role in maintaining data reliability, fiscal integrity, and institutional alignment. However, full realization of these gains depends on completing the

Invoke Data Warehouse tables, finalizing Argos implementation, and securing consultant and staffing resources to ensure project continuity.

## Service Area Outcomes (SAOs) & KPIs

Outcome or Indicator	SAO/KPI Description	Assessment Method(s)	Target	Prior Year Result
Data Governance Implementation	Implement and operationalize a districtwide data governance framework aligning definitions, data sources, and reporting standards across all colleges.	Track participation in governance meetings; audit adoption of definitions and validation standards.	Governance charter finalized and 80% definition alignment by FY26.	Governance charter drafted; 50% definition alignment (FY25).
Data Warehouse Table Development	Complete and validate all 13 primary data warehouse tables to serve as the district's single source of truth.	Track number of tables developed, validated, and integrated with Tableau and Argos.	13 tables validated and connected by FY27.	2 tables completed and validated; 11 in progress (FY25).
MIS & 320 Reporting Accuracy	Ensure all state-mandated reports are submitted on time and validated to maximize SCFF outcomes.	Review submission timelines, validation reports, and audit logs.	100% on-time submission; zero validation errors.	100% on-time; zero validation errors (FY25).
Argos Implementation and Audit Readiness	Transition from Cognos to Argos reporting, ensuring Argos outputs are traceable to validated data sources.	Conduct cross-system audits between Argos and warehouse tables.	100% Argos reports validated by June 2026.	Transition in progress; validation phase pending (FY25).
Program Review Dashboard Redesign	Redesign and relaunch dashboard using a Joint Application Development (JAD) process.	Track milestones, user feedback, and launch timeline.	Launch new dashboard by Summer 2026; 90% user satisfaction.	Design phase initiated; funding for consultant support pending (FY25).
Data Literacy and Training	Redesign and relaunch dashboard	Track participation and	≥6 sessions per year;	4 sessions; 90%

Outcome or Indicator	SAO/KPI Description	Assessment Method(s)	Target	Prior Year Result
Expansion	using a Joint Application Development (JAD) process.	post-training satisfaction surveys.	≥90% satisfaction.	satisfaction (FY25).
Project Completion Timeliness	Redesign and relaunch dashboard using a Joint Application Development (JAD) process.	Monitor IRR project tracker milestones quarterly.	≥80% of projects completed on schedule.	70% completion rate (FY25).
Equity-Focused Data Access	Expand dashboards to include disaggregated equity metrics for all student outcomes.	Audit dashboards for disaggregated data inclusion.	100% dashboards with equity metrics by FY27.	60% dashboards with equity fields (FY25).
Stakeholder Satisfaction	Measure satisfaction with IRR data tools, responsiveness, and reliability.	Annual stakeholder survey and usage analytics.	≥90% satisfaction.	87% satisfaction (FY25).

### Gap Analysis Narrative:

The 2025–26 cycle revealed meaningful progress in data quality, reporting accuracy, and system modernization while identifying critical gaps in infrastructure, staffing, and project capacity that must be addressed to sustain and complete IRR’s strategic objectives.

### Strengths:

**Reporting Accuracy:** IRR achieved 100% on-time, error-free MIS and 320 submissions.

**Governance Progress:** Definition alignment and governance practices are being formalized across colleges, improving data credibility.

**Transparency and Collaboration:** Enhanced coordination with IT and college research offices has improved system integration and consistency in reporting.

## Gaps and Needs:

**Incomplete Data Warehouse Tables:** Only 2 of 13 tables are fully complete. The remaining tables are in active development but require consultant funding and technical resources to complete and validate. This is now IRR's highest operational priority.

**Argos Implementation and Accountability:** While IT manages Argos infrastructure, IRR is accountable for ensuring data integrity. Clearer delineation of responsibility between IRR and IT is needed to maintain system consistency and audit readiness.

**Consultant and Human Resource Capacity:** Current staffing and consultant support are insufficient to meet project demand, manage transitions, and complete development work on schedule.

**Governance Maturity:** Governance practices are established but not yet institutionalized across all data owners and systems.

**Equity and Disaggregation:** Dashboards increasingly include equity fields, but further standardization and expansion are needed.

## Lessons Learned and Next Steps:

The year's progress demonstrates that IRR's governance and system modernization efforts are effective, but success is constrained by capacity and resourcing. To close identified gaps and sustain progress, IRR will:

Secure consultant funding to complete and validate all remaining data warehouse tables and ensure Argos and Tableau integration.

Clarify IRR-IT reporting accountability for Argos system ownership, maintenance, and data validation.

Fill critical staffing positions (Assistant Director and Research Analyst III) to strengthen daily operations and project throughput.

Finalize and implement the Data Audit Framework to ensure data traceability and transparency.

Fully disaggregate dashboards to support equity and institutional effectiveness goals.

Completion of the Invoke Data Warehouse and Argos integration will transform IRR's reporting ecosystem—making it fully auditable, accessible, and aligned with districtwide governance standards. These advancements are essential to ensure data reliability, maximize SCFF funding, and uphold Kern CCD's commitment to student success, equity, and fiscal accountability.

## IV. Look Forward: Two-Year Strategic Plan

### Goal 1

#### Goal Title:

Strengthen Organizational Capacity and Leadership Continuity

#### Strategies & Action Items:

By FY 2027, fill the Assistant Director and Research Analyst III (Program Manager) positions, implement a project management framework, and achieve at least 90% on-time completion of IRR projects through distributed leadership and workload balance.

#### Strategies and Action Items:

Recruit and onboard the Assistant Director and Research Analyst III positions by Fall 2025.

Launch a districtwide IRR project tracker to monitor milestones, resource allocation, and completion rates.

Define supervisory and mentoring structures to ensure daily oversight and leadership continuity.

Develop and formalize a professional pathway for IRR staff from Analyst to AVC.

Conduct quarterly project reviews and progress reports to monitor performance metrics.

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**Timeline:**

Year 1 (FY 2025–26): Hire staff, implement project tracker, begin mentorship and leadership structure.

Year 2 (FY 2026–27): Evaluate completion rates, refine workload balance, and institutionalize professional pathways.

**Strategic Goal Alignment:**

Employee Culture – Builds career advancement, retention, and leadership sustainability.

Employee Technology – Introduces digital project tracking tools for greater accountability.

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**KCCD Strategic Goal Alignment:**

Employee Culture, Employee Technology

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**Goal 2**

**Goal Title:**

Complete Invoke Data Warehouse and Integrate Reporting Systems

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**Strategies & Action Items:**

By FY 2027, complete and validate all 13 Invoke Data Warehouse tables, fully integrate them with Tableau and Argos, and ensure all district reports are sourced from validated, auditable data.

**Strategies and Action Items:**

Secure consultant funding to complete development and validation of the remaining 11 data warehouse tables.

Conduct table-by-table validation and publish documentation to the district Data Governance site.

Connect validated tables to existing Tableau dashboards and Argos reports for live, auditable data access.

Establish a schedule for quarterly warehouse validation and audit cycles.

Coordinate with IT to align system infrastructure, security, and data pipelines for Argos integration.

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**Timeline:**

Year 1 (FY 2025–26): Complete 6 additional tables; begin Argos-Invoke integration.

Year 2 (FY 2026–27): Complete all 13 tables, implement audit validation cycle, and finalize integration with Tableau dashboards.

**Strategic Goal Alignment:**

Employee Technology – Strengthens backend data systems and reporting infrastructure.

Student Technology – Ensures data reliability for planning, success metrics, and equity initiatives.

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**KCCD Strategic Goal Alignment:**

Student Technology, Employee Technology

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**Goal 3**

**Goal Title:**

Advance Data Governance, Literacy, and Accountability

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**Strategies & Action Items:**

By FY 2027, fully implement the district Data Governance Framework, standardize core definitions across colleges, and deliver six or more districtwide data literacy trainings annually with at least 90% satisfaction.

**Strategies and Action Items:**

Finalize and distribute the KCCD Data Governance Handbook.

Establish data ownership roles and cross-college validation workflows.

Conduct six governance and literacy training sessions each year focused on Argos, Tableau, and warehouse data validation.

Monitor definition adoption through governance committee minutes and data validation reports.

Implement quarterly governance meetings to maintain consistency and accountability.

**Timeline:**

Year 1 (FY 2025–26): Publish handbook, host three trainings, finalize core data definitions.

Year 2 (FY 2026–27): Conduct quarterly governance audits, complete six trainings, evaluate framework effectiveness.

**KCCD Strategic Goal Alignment:**

Student Technology, Employee Culture

**Goal 4**

**Goal Title:**

Integrate Equity Analytics and Expand Dashboard Access

**Strategies & Action Items:**

By FY 2027, ensure 100% of district dashboards and data tools include disaggregated equity metrics and increase dashboard utilization across the district by 25%.

**Strategies and Action Items:**

Embed disaggregated equity metrics (race/ethnicity, gender, first-generation status, etc.) into all dashboards and reports.

Collaborate with DEI committees to align metrics with state and district equity frameworks.

Conduct user training for faculty, deans, and administrators on interpreting and applying disaggregated data.

Track dashboard usage and user analytics to measure adoption and satisfaction.

Host an annual “Data Summit” to showcase equity analytics and best practices across the colleges.

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**Timeline:**

Year 1 (FY 2025–26): Integrate equity fields into 50% of dashboards; launch initial Data Summit.

Year 2 (FY 2026–27): Achieve full equity integration and increase active dashboard users by 25%.

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**KCCD Strategic Goal Alignment:**

Student Culture, Employee Culture

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**Goal 5**

**Goal Title:**

## Establish Districtwide Data Audit and Reporting Framework

### **Strategies & Action Items:**

By FY 2027, implement a districtwide Data Audit Framework using the Invoke Data Warehouse and Argos reporting systems to ensure that 100% of official reports and dashboards are traceable to validated, auditable data sources.

### Strategies and Action Items:

Develop and approve a district Data Audit Framework outlining validation standards and procedures.

Conduct semi-annual data audits to confirm Argos and Tableau reports align with warehouse data.

Develop audit dashboards to visualize data lineage and quality metrics.

Train district and college researchers on audit and data verification practices.

Publish an Annual Data Integrity Report documenting audit results and system improvements.

### **Timeline:**

Year 1 (FY 2025–26): Draft and pilot Data Audit Framework; conduct first audit cycle.

Year 2 (FY 2026–27): Institutionalize audit cycles; publish first Data Integrity Report and expand Argos validation documentation.

### **KCCD Strategic Goal Alignment:**

Student Technology, Employee Culture, Employee Technology

## **Goal 6**

### **Goal Title:**

Improve Project Management, Efficiency, and Communication

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### **Strategies & Action Items:**

Over the next two years, IRR will complete the Invoke Data Warehouse, implement Argos reporting and data audit systems, and solidify data governance as the backbone of district operations. Staffing expansion, consultant support, and governance maturity are critical to ensuring these initiatives reach completion.

When fully realized, these goals will:

Provide colleges and district leadership with validated, auditable, and equitable data.

Improve transparency and accountability across all reporting systems.

Strengthen IRR's leadership as the central data governance and analytics hub for Kern CCD.

By FY 2027, achieve 80% on-time project completion and implement quarterly progress reports to the Chancellor's Cabinet and College Leadership using a transparent project tracking dashboard.

### **Strategies and Action Items:**

Launch the IRR project tracking system with real-time status categories (Not Started, In Progress, Off Track, Completed).

Standardize project initiation, documentation, and closure templates.

Deliver quarterly progress reports to district and college leadership.

Conduct annual efficiency assessments using project tracker analytics.

Align project prioritization matrix with KCCD Strategic Plan goals.

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**Timeline:**

Year 1 (FY 2025–26): Implement tracker, deliver two progress reports.

Year 2 (FY 2026–27): Institutionalize quarterly updates, evaluate metrics, and refine prioritization processes.

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**KCCD Strategic Goal Alignment:**

Employee Culture, Employee Technology

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**Goal 7**

**Goal Title:**

Strengthen Districtwide Trust and Organizational Climate Through Transparent, Responsive Research

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**Strategies & Action Items:**

Publish an annual Employee Climate & Wellness Insights Brief that translates survey findings into accessible summaries for all employees.

Partner with HR and leadership to track progress on climate-related action items (e.g., flexible work policies, workload equity, professional growth pathways).

Develop a public-facing dashboard tracking progress on key climate indicators (retention, engagement, participation).

Facilitate structured dialogue sessions with colleges to interpret climate data locally and co-create improvement strategies.

Measure improvement in stakeholder satisfaction related to transparency and communication.

Create micro-pulse surveys to monitor emerging concerns between major survey cycles.

Develop a “You Said / We Did” reporting model in partnership with HR and Cabinet to demonstrate responsiveness.

Partner with HR to evaluate the impact of flexible work policies using retention and engagement data.

Analyze workload distribution patterns where possible (e.g., research request volume trends).

Develop leading indicators of burnout risk (response times, project backlog trends).

Provide annual climate trend analyses to Cabinet to inform staffing and operational decisions.

Model sustainable project management within IRR and share best practices districtwide.

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**Timeline:**

By FY 2027, Institutional Research & Reporting will actively contribute to a positive district climate by increasing transparency, closing feedback loops from employee climate research, and ensuring that institutional data is used to support inclusive, responsive decision-making.

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**KCCD Strategic Goal Alignment:**

Employee Culture

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## V. Resource Requests & Prioritization

### Staffing Requests:

The Institutional Research & Reporting (IRR) department continues to operate at maximum capacity under a single-administrator model while supporting districtwide reporting, analytics, and data governance. The department currently manages more than 20 active projects, including the Invoke Data Warehouse build-out, Argos transition, and Tableau system integration, while simultaneously responding to an average of 5–10 major research requests and 5–10 short-turnaround data requests each month.

To sustain project delivery and compliance, IRR requests the addition of two critical positions:

#### Assistant Director of Institutional Research & Reporting

This position will provide daily supervision, project management, and operational leadership for IRR. The Assistant Director will ensure timely completion of projects, manage workload distribution, and serve as the primary point of coordination with college IR offices and IT. This role is essential to alleviate the administrative bottleneck that currently limits efficiency and progress, allowing the AVC to focus on strategic planning and districtwide governance.

#### Research Analyst III (Program Manager)

This senior analytical position will lead complex projects including completion of the remaining 11 data warehouse tables, Argos integration, and major dashboard redesigns such as the Program Review Dashboard. The Research Analyst III will also mentor junior analysts and strengthen the professional pathway within IRR (Analyst → Program Manager → Assistant Director → AVC), ensuring retention and leadership continuity.

Without these roles, IRR cannot meet project deadlines, maintain governance cycles, or support the Argos transition on schedule. These positions directly support compliance, accuracy in SCFF funding, and sustainability of districtwide data systems.

#### REVISED:

The Institutional Research & Reporting (IRR) department continues to operate at maximum capacity while managing districtwide compliance reporting, data governance implementation, warehouse development, and reporting modernization. As system complexity increases—particularly with Argos implementation and warehouse validation cycles—IRR’s most immediate need is dedicated support for compliance and data governance implementation, development, and ongoing support.

To sustain reporting accuracy, audit readiness, and governance maturity, IRR requests the following positions:

## 1. Project Coordinator – Data Governance & Compliance

### Purpose:

This position will coordinate districtwide data governance activities and support compliance reporting workflows, ensuring alignment between data validation, documentation, and state/federal reporting timelines.

### Primary Responsibilities:

Facilitate Data Governance Committee meetings and documentation.

Track adoption of standardized data definitions across colleges.

Coordinate MIS and 320 reporting calendars and validation workflows.

Maintain governance documentation, audit logs, and data lineage records.

Serve as liaison between IRR, IT, and college research offices on reporting deadlines and data standards.

Support Argos report validation and warehouse audit cycles.

### Impact:

This role shifts IRR from reactive compliance management to structured, coordinated governance execution. It ensures that reporting processes are transparent, documented, and audit-ready while relieving senior staff from administrative coordination burdens.

This position directly supports:

SCFF funding protection

Audit readiness

Data integrity

Cross-college accountability

## 2. Research Analyst I – Compliance & Reporting

### Purpose:

This entry-level analyst will provide dedicated technical support for state-mandated compliance reporting, including MIS, 320, and related accountability submissions.

### Primary Responsibilities:

Assist in preparation, validation, and submission of MIS and 320 reports.

Conduct data validation checks against warehouse tables.

Support disaggregation and equity reporting requirements.

Produce recurring compliance dashboards.

Monitor reporting changes from the Chancellor's Office and update documentation accordingly.

Provide backup capacity during peak reporting cycles.

Impact:

Currently, compliance reporting responsibilities are concentrated within limited staff capacity. This position stabilizes high-risk, deadline-driven functions and creates redundancy in critical compliance workflows.

It also builds a structured analyst pathway within IRR while ensuring continuity of operations during system transitions.

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### **Professional Development Requests:**

IRR requests to maintain its current professional development and travel budget to support a team of 10 staff members. Professional development is essential for keeping the team aligned with evolving state and national data standards, SCFF methodologies, and emerging data governance practices.

Funding supports attendance at statewide and national conferences such as the RP Group Conference, AIR Forum, Data Governance Summits, and Tableau/Argos training sessions. These opportunities provide critical professional learning and networking that strengthen IRR's capacity to:

Stay current with CCCC reporting changes and audit requirements;

Deepen technical skills in Tableau, Argos, and SQL for warehouse integration;

Implement best practices in governance and equity-focused analytics; and

Maintain institutional compliance and data integrity districtwide.

Maintaining the existing professional development budget ensures Kern CCD's IRR team remains at the forefront of statewide innovation and compliance in institutional research.

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## **Facilities, Equipment & Space Requests:**

To accommodate new leadership and technical capacity needs, IRR requests:

Two dedicated workspaces—one for the Assistant Director and one for the Research Analyst III (Program Manager)—at the District Office, equipped for hybrid operations and confidential data discussions.

Authorization for remote or hybrid work if physical space is unavailable, consistent with districtwide flexible work policies.

Computer and technology setups for two new staff members, including secure workstations, monitors, and VPN access configured for Argos and warehouse data work.

These positions are essential for daily operations, project oversight, and data development. If sufficient workspace is unavailable, remote authorization is critical to enable timely recruitment and retention of skilled data professionals in a competitive market.

## **Technology Requests:**

IRR's technology needs are driven by the district's transition to an integrated data environment centered around the Invoke Data Warehouse and Argos reporting system. The following investments are required to sustain progress, maintain compliance, and ensure project completion:

### **a. Invoke Data Warehouse Completion and Consultant Support**

Only two of the thirteen data warehouse tables are complete. Continued consultant funding is essential to complete the remaining eleven tables, validate data, and connect them to Tableau and Argos systems. Without this support, project completion will be delayed, compromising data accuracy, accessibility, and fiscal reporting integrity. Consultant services will also support validation documentation and governance alignment as part of the Data Audit Framework implementation.

### **b. Program Review Dashboard Redesign**

IRR requests consultant funds to support a full redesign of the Program Review Dashboard. The redesign will follow a Joint Application Development (JAD) process, engaging faculty, deans, and administrators in building user-friendly, equity-focused visualizations. Consultant support ensures timely delivery and integration with the warehouse and Argos.

### c. Argos Implementation Support

As the district transitions from Cognos to Argos by June 2026, IRR requests funding for consultant and training support to ensure Argos reports are validated, auditable, and fully aligned with governance and data warehouse standards.

### d. Software and Licensing

Several data tools previously supported by grant funding (including Tableau Server, Argos, and data validation software) are now institutionalized under IRR's budget. IRR requests funding adjustments to cover increased annual licensing costs, as these systems are used districtwide and directly support compliance reporting and planning.

### e. Hardware and Equipment

Funding is also requested for two full workstation setups (laptops, monitors, docking stations, and peripherals) for new hires, ensuring compliance with cybersecurity and governance protocols for secure data access.

These technology investments are not optional—they are foundational to completing the warehouse, maintaining reporting accuracy, and ensuring districtwide audit readiness. Together, they will allow IRR to deliver validated, accessible, and transparent data tools that strengthen decision-making, compliance, and equity outcomes across Kern CCD.

## VI. Follow-Up on Prior Requests

### Resource Request Follow-Up:

Data Warehouse Developer (Previously Requested – On Hold)

In prior AUR cycles, IRR requested a dedicated Data Warehouse Developer to support the continued build-out and maintenance of the Invoke Data Warehouse. The request was postponed to evaluate the long-term need and scope of work required to justify a full-time developer, given ongoing collaboration with IT and external consultants.

After review, IRR recommends keeping this position on hold for the current planning cycle. While the work to complete and validate the warehouse tables remains substantial, the department will continue to rely on consultant support to complete the remaining eleven tables, sustain validation processes, and advance major dashboard redesigns. This approach balances fiscal responsibility with the need to maintain progress while assessing the overall volume of IRR-specific technical development.

At present, IRR has two of the thirteen data warehouse tables fully completed and validated. Consultant assistance is essential to finish the remaining tables, complete validation cycles, and connect the warehouse to Tableau and Argos reporting assets. Until that work is completed, it is premature to commit to a full-time developer position.

## Future Considerations

As Kern CCD continues its transition from Cognos to Argos by June 2026, IRR must balance daily operational demands, project completion timelines, and system modernization. While IT manages Argos infrastructure, IRR carries the responsibility for data validation, governance, and ensuring all reports are sourced from accurate, auditable data. This division of labor requires ongoing coordination between IRR and IT to ensure clarity of accountability for data reporting and system ownership.

Additionally, IRR is responsible for connecting Invoke Data Warehouse tables to all existing Tableau dashboards—a significant technical effort requiring sustained human resource and consultant support. These integrations are necessary to create a unified, validated, and auditable data environment across the district.

IRR continues to manage a heavy research and reporting workload, averaging 5–10 major requests each month (multi-day projects) and 5–10 smaller requests requiring 24–48-hour turnaround times. Improving automation and usability within the Tableau and Argos ecosystems will help reduce these daily demands, but until that transition is complete, IRR must rely on consultant and staffing support to maintain service quality and timeliness.

If the current level of technical and consultant support is not sustained, the district will continue to face inefficiencies in data retrieval, fragmented reporting processes, and inconsistent access to validated information.

IRR recommends reassessing the need for a dedicated Data Warehouse Developer in FY 2026–27, once the Argos implementation is complete, Tableau-warehouse integration is fully functional, and system workloads can be more accurately evaluated. At that time, workload analysis and governance maturity will determine whether transitioning from consultant-supported development to a permanent technical position is warranted.

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## VII. College Feedback

**Incorporation of College Input:**

Revised staffing plan to move greater supports into compliance reporting team.

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**Department Response to Feedback:**

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