



IR / IE WORKLOAD IMPACT CHECKLIST

To be completed for any contract involving data, reporting, or analytics.

- Site: _____ Bakersfield College
 _____ Cerro Coso Community College
 _____ Porterville College
 _____ District Office
 _____ District-Wide

Department: _____

Requester: _____

Vendor: _____

Description of Service: _____

Date: _____

A. Does This Contract Impact IR/IE?

- Yes No

If **No**, stop here.

If **Yes**, complete all sections below.

B. Reporting Requirements FROM the New System

(IR/IE extracting or designing reports from vendor software)

- IR/IE will be required to run, design, or extract reports
 Reports are ad hoc
 Reports are recurring

Expected report frequency:

- One-time
 Monthly
 Term-based
 Annual
 Other: _____

Will IR/IE staff require training on the new system to generate reports?

- Yes No

Training provided by vendor:

- Yes
 No

- Limited
 - Ongoing
-

C. Reporting Requirements TO the New System

(IR/IE submitting data from Banner or other district systems)

- IR/IE will be required to submit data to the system
- One-time submission
- Recurring submissions

Submission frequency:

- Daily
- Weekly
- Monthly
- Term-based
- Annual

Source system(s):

- Banner – Student
 - Banner – Employee
 - Other: _____
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D. Data Elements, Metrics, & Definitions

(Required for either direction: data extracted from or submitted to the system)

- Vendor has provided a complete list of required data elements
- Metrics and measures are clearly defined
- Definitions align with district standards
- Derived or calculated fields are documented

Data level required:

- Aggregate
 - Student-level
 - Employee-level
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E. Data Extraction Details

(If Banner or other district systems are used)

- Specific data fields to be extracted are identified

Data format required:

- CSV
- Excel
- API
- Flat file
- Other: _____

- Historical data required
- Ongoing incremental updates required

Estimated data volume (if known):

F. IR/IE Effort & Capacity Considerations

(For internal IR/IE assessment)

- New report development required
- Ongoing report maintenance required
- Data validation or reconciliation required
- Documentation required
- Ongoing vendor coordination required

Estimated level of effort:

- Low
- Moderate
- High

G. Dependencies & Risks

- Definitions not aligned with district standards
- Reporting expectations unclear
- Frequency creates ongoing workload
- Tool complexity exceeds current IR/IE capacity

H. IR/IE Review & Sign-Off

- IR/IE has reviewed and approved workload impact
- Adjustments required before contract approval

Reviewed by:

Date:
