PROCEDURE FOR INSTITUTIONAL DATA REQUESTS
Revised April 2025

This procedure applies to data supplied by Institutional Research. The privacy and confidentiality guidelines in this document only apply to IR data use and requests. The work of Institutional Research is subject to SFBU policies regarding privacy and confidentiality

Purpose
Institutional Research (IR) encourages and supports the use of institutional data, analysis, and research for decision making, in keeping with SFBU's educational mission. The primary purpose of this document is to be a useful resource for anyone needing institutional information to support a project, initiative, or presentation. It describes and explains guidelines for the use of institutional data including criteria for fulfilling data requests, limitations, confidentiality, and sensitivity, as well as self‑service options, and availability of other resources.

A "data request" is defined as a request for information about SFBU students, courses, faculty, finances, research, or staff that is going to be used to support the administration of the University. IR has access to a wide variety of data in a range of formats, such as detailed administrative data, survey results in both summary and individual survey responses, and summarized statistics. Much of this data is "owned" by other offices at SFBU and often contains highly confidential and sensitive information. Thus it is important to articulate the procedures and guidelines that affect the use of this information.

Criteria for Data Requests
1. The main criterion for fulfilling a request for data is that the information will be used for University administrative purposes, such as a request from a faculty council, administrative office, or committee. This could be any committee composed of SFBU faculty or administrative staff.
2. In determining what can be provided, IR needs to be mindful of institutional priorities and deadlines. IR also needs to consider the time and effort required to prepare a special request against the usefulness the data will have in support of the education and research missions of the University. Listed below are the highest priority items within IR responsibilities.
   a. **Mandatory Reporting.** Federal, state, and accrediting agency reporting, where compliance is mandatory.

a. **Institutional Priorities.** Requests by members of the Board of Trustees, Deans, senior administrators, faculty representatives of standing committees, or to support institutional planning and exploratory analysis.
b. **Exploratory Analysis and Institutional Planning.** Requests by departments or programs for use in educational assessment or program review.
c. **Classroom and Research Support.** Requests for data to support personal research or classroom usage by individual members of the university community are handled on a case‑by‑case, and a time‑available basis. If the requested data is readily available and the confidentiality requirements are met, IR will then work with the requestor to make the appropriate data available.

Note: **IR encourages the use of data that is already collected and available rather than individual members having to collect it independently.** Please refer to "Other Resources/Self Service" section of this document for the list of resources of available data.

Request Data
1. Please confirm that the data you seek is NOT available on the [IR Fact Book site](#).
2. Submit data request via the [Data Request Portal](#)
   a. Larger data requests should be submitted at least 4 weeks in advance of the desired delivery date (e.g., for accreditation reporting purposes)
3. Receive approval or denial for your request from IR within 2 business days
4. You may receive additional clarification questions from IR, potentially delaying the approve/deny decision

Once the request is submitted. IR staff will review the request for alignment with institutional priorities, clarify any additional definitional questions or ambiguities, and if approved, notify the requester of the estimated timeline for data delivery.

Requesters are encouraged to share their findings or analyses with IR to ensure proper use of the data and support future improvements.

Appropriate Use
1. Unless the data is publicly available, the results of studies using SFBU administrative data **should not** be made public, or published, **without the explicit approval of IR**.
2. To protect privacy, unless there is a clearly demonstrated educational need to have personally identifying information, IR will present information only in summary form; or if it is in unit record form, it will be provided with any personal identifiers stripped from the records. FERPA and other privacy rules pertain, and in some cases, it may be necessary to get Institutional Review Board (IRB) approval before survey data is shared beyond the original purpose.

3. Note that SFBU cannot use confidential survey responses to target individuals for action or intervention.

All IR data requests and reporting procedures are governed by the larger SFBU policies on data.

<u>Limitations and Escalation</u>
IR strives to fulfill all data requests; however, certain limitations apply:

- **Resource Constraints:** Requests requiring extensive customization or conflicting with institutional priorities may be delayed or declined.
- **Escalation Process:** If a request is denied, it may be escalated for review by the IR director or a designated committee on a case-by-case basis.

Contact Information
For questions or assistance, please contact IR at ir@sfbu.edu.

Other Resources/ Self Service:

1. **Training and Resources.** IR staff provides training and tutorials for using self-service tools, such as interpreting dashboards. Please email the IR staff at ir@sfbu.edu to request assistance.

2. **Summary Data.** Summary data is available on the IR website at: https://sfbu.edu/learning-teaching/ir. This includes Fact Books, a collection of commonly requested data about SFBU (such as retention and enrollment data).

3. **Dashboards.** IR is in the process of building dashboards that will contain additional commonly requested data in an easily accessible format.