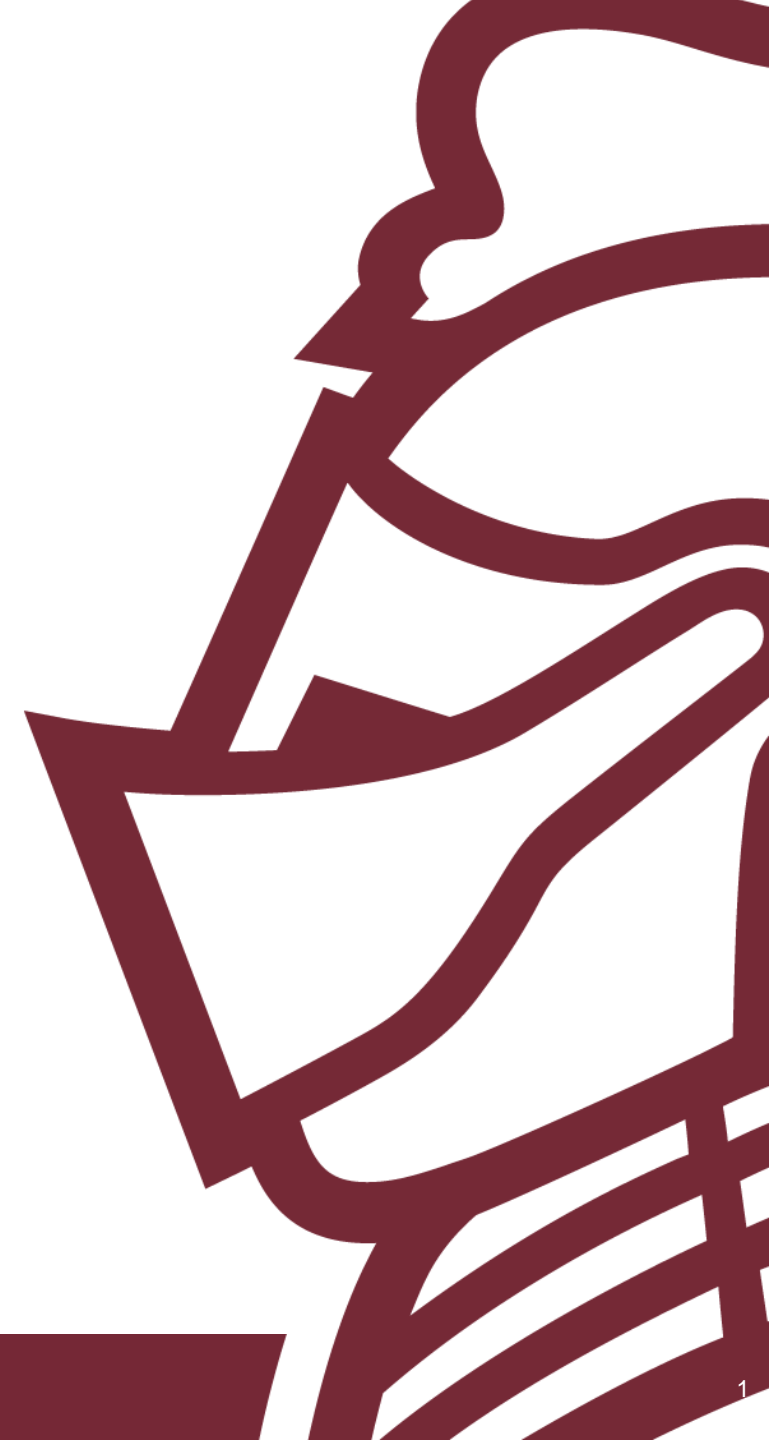# *BlueX as a Cornerstone for a University-wide Survey Policy*

Safeguarding data and protecting respondent privacy while promoting a culture of data-informed decision making

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Office of Assessment, Accreditation, and Institutional Effectiveness
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BlueX as a Cornerstone for a University-wide Survey Policy

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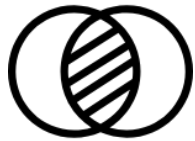
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BELLARMINE UNIVERSITY

Located in Louisville, Kentucky, USA

Founded in 1950 as a Catholic liberal arts college

Merged with Ursuline College in 1968 (coeducational)

Renamed Bellarmine University in 2000

2020-2021:

6 schools with 55+ undergrad majors

20 graduate programs

3,200+ FTE students

275+ FTE faculty

Bellarmine University
Ancestral Land Acknowledgement

We would like to acknowledge that Bellarmine University sits on the ancestral and unceded traditional land of the Osage, Cherokee, Shawnee, Adena, and Hopewell Tribes.

Let this acknowledgement serve as a reminder of the work that needs to be done to recognize, honor and reconcile with the Native peoples whose land we benefit from today.

Learning Objectives & Agenda

Learning Objectives

- Strategies for identifying deficiencies in current practices

- Approaches for policy development that address these deficiencies

- Methods for operationalizing the policy that gain campus support

Agenda

How Bellarmine went about:

- Defining the problem

- Developing the policy

- Operationalizing the policy

- Deploying BlueX as a cornerstone of the policy

Defining the Problem

Defining the Problem

- Lack of a cohesive data collection strategy for survey data

- Multiple offices paying for professional survey accounts

- Multiple offices running redundant surveys in silos

- Lack of oversight re: use of data for assessment/effectiveness

Challenges

- Use of competing survey tools

- Small school, limited resources

- Survey form non-compliance

- Decentralization

- Ensuring community buy-in

Resources

- Building on our existing partnership with Explorance

- Eliminating redundancy / effective stewardship of resources

- Reinforcing survey request form process

- Promoting a cohesive approach to survey data

- Leveraging community skills with web-based survey tools

Challenges + Resources = Solutions

- University policy on survey administration

- BlueX adoption

Developing the Policy

Goals of the Survey Policy

- Prevent survey fatigue

- Prevent overlapping or redundant surveys to the same population

- Promote effective survey design and methodology while offering training opportunities

- Safeguard data and protect respondent privacy

- Support data-informed decision making

Survey Administration Policy

The **Office of Institutional Research and Effectiveness** shall coordinate all surveys of Bellarmine community members. IR&E shall have primary responsibility for administering surveys or evaluations where the purpose is academic or operational assessment, accreditation, compliance, program evaluation, or other research connected to the University's institutional effectiveness efforts. Survey sponsors shall be responsible for demonstrating the extent to which collected feedback leads to meaningful and quality continuous improvement practices.

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Operationalizing the Policy

Survey Request Form

What question or questions are you trying to answer?

Who do you need to survey to answer these question(s)?

What information do you need to get from this survey?

Will you need this to be a recurring survey?

No ⌄

What time period should be surveyed? Please list the specific term(s), date range, calendar or academic year(s).

How do you want the results grouped and sorted? *

Who will see and/or use the survey results? *

When does the survey need to go live? *

____ / ____ / ____

MM   **DD**   **YYYY**

Community Survey Calendar

Survey Policy S.O.P.

Exempt from IR&E administration

Eligible for expedited IR&E administration

Requires full IR&E administration

Survey Policy S.O.P.

Exempt from IR&E administration

Type 1 – Notifying IR&E is **not required:**

- Data collection for administrative purposes

    → Nominations, elections, sign-up forms, event registration, meeting scheduling

- IRB-approved protocol requires confidentiality and PI doesn't need datasources

- One-time feedback on a class, program, or workshop

- Class projects surveying students only within the class

Survey Policy S.O.P.

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Exempt from IR&E administration

</div>

Type 2 – Notifying IR&E is **recommended but not required:**

• Class projects involving deidentified (no PII) data for statistical exercises

• IRB-approved protocol requires confidentiality but the PI needs datasources

• Faculty and Staff Council administrative surveys

Survey Policy S.O.P.

Eligible for **expedited** IR&E administration

Notifying IR&E is **always required.**

At least one initial consultation with IR&E must take place to establish sample, date range, verbiage, etc. Later iterations may not require IR&E involvement.

Examples:
- Alumni surveys
- Health Services surveys
- Strategic Planning

Survey Policy S.O.P.

Requires full IR&E administration

Notifying IR&E is **always required.**

End-to-end involvement by IR&E for each iteration

Accountability for institutional effectiveness protocols/best practices

Examples:
• SETs, including field placement & clinical evaluations
• Student internship 360-degree evals
• Campus climate, satisfaction, or utilization surveys

Why BlueX?

Remember: We identified both **Challenges** and **Resources**

Challenges

- Use of competing survey tools

- Small school, limited resources

- Survey form non-compliance

- Decentralization

- Ensuring community buy-in

Resources

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Why BlueX?

- IR&E doesn't have to administer every survey

- Everybody on campus can have their own creator account

- Familiar interface using web-based, Microsoft Word-esque editor

- Better administrator control and project management on back end

🔥 blueX 🚨

Recap

- Defining the problem

- Developing the policy

- Operationalizing the policy → procuring and deploying BlueX

Questions? Answers!

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