

MONTANA

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History

1. When was the student unit-record (SUR) system established?
The Montana University System's SUR data warehouse was developed in 2000.
2. By whom?
The Montana University System's SUR was established at the direction of the Board of Regents.
3. For what purpose?
The primary purpose of the warehouse is to aid institutional research and analysis at both the system and institutional levels.

Coverage

1. What institutions are included in your SUR system.
The affiliated campuses of Montana State University and the University of Montana are included in the warehouse (comprising approximately 95% of student enrollment system-wide). Three community colleges are not included (Flathead Valley Community College, Dawson Community College, and Miles Community College).
2. Are any independent institutions included (number or percentage)? What about proprietary institutions? Are different kinds of data or different schedules for data collection used for any of these institutions?
No.
3. Are there plans to expand the system's coverage in terms of institutions? Please explain.
Yes, there are plans to add the community colleges.
4. When are data of which type collected (e.g. term/quarter/semester census date, annual, end of term, etc.)? Other reporting cycles?
Semester census and end-of-term.
5. Are there plans to collect data more frequently or on a different cycle?
No.
6. Is non-credit enrollment or instructional activity covered? If so, is this in a separate database and what data elements are captured?
No.

Data Management and Manipulation

1. Who has authority over changing data elements and definitions?
[System Administration.](#)
2. Are SSNs used as a key link? If they are not, what is used instead? Are there immediate or long-range plans to discontinue use of the SSN as a key link?
[A system-wide ID based on SSN's is used as a key link. Currently, there are no plans to change.](#)
3. Can campuses access datasets (unit records) themselves -- access in what terms (results, unit record data after it has been cleaned, unit-record data value added). If yes, who has access and how is this managed?
[Campuses have unit record level access to their own information. Individual campus data warehouses are rolled up to comprise the system-wide data warehouse; therefore, access is primarily managed at the institutional level.](#)
4. How do you handle privacy and FERPA issues? Do you have an explicit privacy policy and/or policies governing the use of SUR data by third parties such as institutions and researchers?
[We do not have an explicit privacy policy, however all SUR data is considered protected under FERPA. We don't allow third party access to our data without careful legal review and agreements clarifying that the information is confidential and will only be used for educational research purposes.](#)
5. Have any FERPA or privacy issues come up recently in your state? If so, how have they affected your ability to use student record information?
[No.](#)
6. Do you link SUR data within your state to other databases? If so, please explain the process further. In each case where such a linkage is made, who is responsible for the match and what restrictions apply to using the resulting data?
[SUR data are linked with UI Wage records. SUR data are securely transferred to the MT Department of Labor where the match is performed. Only aggregate data are returned to the university system.](#)
7. Have you cooperated with other state higher education agencies to share data? If so, please explain.
[Yes, see answer to #6.](#)

Reporting and Use of Data

1. What kinds of statistics and reports are generated regularly using SUR data?
[Official enrollment reports, student success measures, and transferability studies.](#)
<http://bor.montana.edu/data/dataindex.asp>

2. If graduation and retention statistics are generated for institutions (or for the state or system as a whole), how are they calculated?

Retention and graduation rate statistics are primarily calculated using the IPEDS methodology.

3. What kinds of research projects have recently been undertaken by the state or system using SUR data resources?

Remediation rates of recent Montana high school graduates.

Transferability and persistence rates of entering freshmen.

<http://bor.montana.edu/data/transfer/transfer.asp>

4. What are the biggest challenges you face with respect to using SUR data resources for analysis and reporting?

Consistent coding and maintaining data quality.

Overview

1. Have there been any significant developments in regards to SUR since 2002?
System-level data has become more readily accessible due to Board of Regents commitment to data driven strategic planning.