**Interactive Regional Dashboard Webinar Training Guide**

**Host:** Texas Higher Education Coordinating Board

**Virtual Event:** August 11, 2020

**Time:** 12:00 PM – 2:30 PM

**Event Recording:** <https://youtu.be/WJpdq-LTKZk>

# Tableau Resources

Tableau Workbook  with activities: <https://public.tableau.com/profile/thecb.data#!/vizhome/RegionalDashboardTraining_Aug11/RegionalTraining>

Tableau Dashboards:

<http://www.txhighereddata.org/index.cfm?objectid=FEA194F0-7EC9-11EA-9D0F0050560100A9>

*Note: This goes to a landing page that has links to two dashboards: (1) 60x30TX Regional Dashboards and (2) Institutional Completions Dashboards. Each dashboard contains multiple tabs.*

# Agenda

* Welcome
	+ Welcome
	+ Objectives/Level Setting/Logistics Level Setting
* 60x30TX Regional Targets Overview
	+ Overview of 3 target areas for regional efforts
* Education Population
	+ Regional Targets Dashboard Tab
	+ Education Population Dashboard Tab
* Completions
	+ Completions by Demographics Dashboard Tab
	+ Completions by Credentials Dashboard Tab
	+ Institutional Completions & Target Dashboard Tab
	+ Completion Credentials by Institution Dashboard Tab
	+ Institutional Completions by demographics Dashboard Tab
	+ Public Completions by Race/Ethnicity Dashboard Tab
	+ Independent Completions by Race/Ethnicity Dashboard Tab
* High School to Higher Education
	+ Direct enrollment tab Dashboard Tab
* Wrap-Up

*Note: A full list of data activities is provided in this training guide to help you get familiar with the dashboards. Please note that all data activities were not covered as part of the meeting.*

# Regional Dashboards Training

Welcome to the Regional Targets and Institutional Completion Targets Dashboard Training.

The key learning outcomes are:

1. Learn about functionality and data points of THECB Dashboards
2. Compare and discuss data on regional 60x30TX targets and current outcomes
3. Compare and discuss data on institutional completion targets and current outcomes
4. Advance our shared understanding of applying an equity framework to data discussions

The dashboard objective is to supply 60x30TX regional data in a visually enhancing manner that will facilitate strategies at a regional level.

This training is hands-on. You will not only learn about the features, but you will also learn how to use via data activities.

# Regional Targets Overview

Dashboard: 60x30TX Regional Dashboards

Three regional targets

* 60x30 Educated Population (estimate of 25-34-year-old Texas residents with a certificate or above)
* Completion (count of Certificates, Associates, Bachelor’s, and Masters)
* Direct high school to higher education enrollment

Some key user features are drop-down lists, tooltips that appear when you move your mouse to hover and discover, highlight tables to read data faster, and tabs at the top to navigate the various views.

The regional targets overview provides a quick take on the progress of the regional targets. You’ll see tooltips as you hover over the bar charts or the BANs (Big Authoritative Numbers).

Steps to access your regional data.

1. Select a view from the tabs
2. Select a region from the drop-down list
3. Move mouse to hover and discover

# 60x30 Educated Population

Data visualization takes out some of the wonkiness by incorporating tooltips. The tooltips provide more information to the graphs or BANs presented.

## Regional Targets Overview – 60x30 Educated Population

Training: 60x30TX Regional Targets Dashboard Tab

Data review and Highlight all features relevant to all views

Dashboard: 60x30TX Regional Dashboards

Data Activity #1

1. On regional targets overview, locate your region’s 60x30 Educated Population data.
2. Did your region trend up, down, or stay the same during from 2015 - 2018?
3. Do you expect this trend to continue?

## 60x30 Educated Population View

There are three data visuals here. The first is a line graph like the regional targets overview. You will see that the tooltips provide estimated totals and the data source.

The highlight table has a lot of data. There might be times where you don’t want to see all of that data.

Here are a few tricks to customize your view.

### Sort

Method 1: Place your mouse on one of the years or one of the credentials until you see a bar chart with an arrow pointing to the right. That is your sort feature. The data can be sorted in either ascending or descending order.

Method 2: Click on a year or credential. A tooltip appears and you will see two bar charts with arrows pointing down.

### Keep or Exclude

This feature allows you to customize the data you wish to view. This feature can be applied to just one data point or multiple rows or columns. To apply this feature to multiple rows or columns, use the shift or control key.

Training: 60x30 Educated Population Dashboard Tab

Data review and Highlight all features relevant to all views

Dashboard: 60x30TX Regional Dashboards

*In the following data activity, we are interested in trends for the years 2017 and 2018 only.*

Data Activity #2

1. On the 60x30 Educated Population view, what are the top three credentials for your region in the years 2017 and 2018?
2. How would you summarize the educated population by credential in your region based on this data?

Data Activity #3

1. On the 60x30 Population 2018 & 2020 Projections view, sort the 18 – 24 age group in descending order.
2. Is the 2020 Projection an increase or decrease from 2018 in each segment?

Training: 60x30TX Regional Targets Dashboard Tab & 60x30 Educated Population Dashboard Tab

Dashboard: 60x30TX Regional Dashboards

***Data Activity #4 (Breakout Discussion)***

1. Thinking about your region’s 60x30 Educated Population trend for the years 2015 – 2018, is the trend moving in the direction you expected? How so or how not?
2. What is 1 key factor that explains your region’s 60x30 Educated Population trend for the years 2015 – 2018?
3. Identify 1 key factor that is unique to your region that you anticipate impacting your region’s ability to meet the 2020 and 2030 targets.

# Completions

Completions will span across both dashboards – 60x30TX Regional Dashboards and Institutional Completions Dashboards

First, we will view completions from a regional only perspective. Next, we will focus on the institutional perspective to provide more context for a deeper dive.

### Legends

Besides helping the user match the categories to the charts, legends in Tableau highlight the category. The category highlighted will stand out because the other categories not selected will be dulled out. Legends also have the keep only and exclude options. This can be useful to customize a view for analysis or download.

### Undo, Redo, Reset

There might be times when the user wants to undo, redo, or reset the views. There are three methods to accomplish any of these needs.

#### Undo

Method 1: Control + Z on a PC, CMD + Z on a Mac

Method 2: Scroll to the bottom and click on the arrow pointing left.

#### Redo

Scroll to the bottom and click on the arrow pointing right.

#### Reset

Method 1: Control + R on a PC, CMD + R on a Mac

Method 2: Scroll to the bottom and click on the arrow with a straight line and pointing left.

### Download view

Scroll all the way to the bottom of the page. In the lower right corner, you will a rectangle with an arrow pointing down. That is the download button. The view can be downloaded in three ways – Image, PDF, or PowerPoint. Regional Completions

Training: Completions by Demographics Dashboard TAB

Data review and Highlight all features relevant to all views

Dashboard: 60x30TX Regional Dashboards

Data Activity #5

1. Use the Completion by Demographics view.
2. Which year had the highest completion for African-American, Hispanic, White, Other in your region?
	1. For extra credit, Download in PowerPoint and email a view of completions by race/ethnicity to Luis.Martinez@highered.texas.gov

Training: Completions by Credentials Dashboard TAB

Data review and show layout and highlight same features apply

Dashboard: 60x30TX Regional Dashboards

***Data Activity #6 ( Breakout Discussion)***

1. Use Completions by Credentials view.
2. What is the degree most earned in your region overall?
3. What is the degree most awarded among economically disadvantaged students in your region?
4. How does the most awarded degree among economically disadvantaged students compare to awards overall for the region?
5. Identify 1 key factor that helps to explain the differences in your completions for your economically disadvantaged students compared to your overall student population.

Training: Institutional Completions & Target Dashboard Tab

Data Review trends and outlook

Dashboard: Institutional Completions Dashboards

Data Activity #7

* 1. Use the Institutional Completion and Targets view.
	2. Locate your institution’s data.
	3. Is the growth rate trending up or down for 2018 to 2019?
	4. Do you expect the growth rate trend to continue?

Training: Completion Credentials by Institution Dashboard Tab

Data review and highlight key features

Dashboard: Institutional Completions Dashboards

Data Activity #8

1. Use Institutional Completions by Credential view from Institution Completion and Targets dashboard.
2. Which year did your institution award the highest number of total degrees?

Training: Institutional Completions by Demographics Dashboard Tab

Data review and highlight key features

Dashboard: Institutional Completions Dashboards

Data Activity # 9

1. Use Institutional Completions by Demographics view from Institution Completion and Targets dashboard.
2. Which two race(s) or ethnicity(ies) had the lowest number of completions for your institution during 2014 – 2019?

Public Completions by Race/Ethnicity

Data review and highlight key features

Dashboard: Institutional Completions Dashboards

***Data Activity # 10 (Breakout Discussion)***

1. Use Completions by Race/Ethnicity (Publics) view from Institution Completion and Targets dashboard. You may keep track of the Sorts by downloading the views.
2. Sort your region’s Total Public Completions from highest to lowest.
3. Sort your sector’s Total from highest to lowest.
4. Sort your institution's completions from highest to lowest.
5. Does the data indicate there are opportunities to advance equity across your region, sector, and/or institution? Explain
6. Does the data show consistent trends of advancing equity across your region, sector, and institution? Explain.

Independent Completions by Race/Ethnicity

Data review and highlight key features

*Note: Some regions do not have independent institutions: Upper Rio Grande, West Texas, Southeast*

Dashboard: Institutional Completions Dashboards

# High School to Higher Education

High school to higher education has a few different party tricks. These features allow the user to view larger datasets in an efficient manner. This new feature can be used in conjunction with the previous feature we have learned. The final data activity will ask you to multiple features.

### Highlighter

The highlighter enables the user to search for an ISD in that region. The highlighter dulls out the non-selected ISDs to make easier for the user to view the ISD and compare against other ISDs in those years.

Training: Direct Enrollment Dashboard Tab

Data review and highlight key features

Data Activity # 11

1. Use High School-to-Higher Education Enrollment view in Regional Targets dashboard.
2. Identify the ISD with the second highest direct enrollment percentage for 2019.
3. Pick this ISD from the highlighter drop-down list.
4. Compare the total number of students enrolled for the ISD you selected and the ISDs with the lowest and highest direct enrollment rates.
5. How might you use this data to help inform collaboration with your regional ISDs?

Data Activity #12 (POC led Breakout Discussion)

1. Sort Direct Enrollment Percentage in descending order based on % (note you should see the years change order).
2. Sort Direct Enrollment by Race/Ethnicity in descending order based on number of students (note you should see the years change order).
3. How does the direct enrollment percentage compare to number of students enrolling by race/ethnicity? Explain what this tells us about direct enrollment and high school graduates in your region.
4. Identify 1 factor unique to your region that you think explains this trend.

# Wrap-Up

Resources to be shared

1. Recording of the Training
2. Training Guide
3. Equity Resources:
	1. Discussing Education Data with an Equity Lens including template (PDF, WORD, PPT)
	2. Educational Equity and discussing Education Data