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ABSTRACT

This document is one of the 5 sections of the Data Element Dictionary developed as part of the WICHE Management Information Systems (MIS) Program. The elements in this section apply to both the current and historical data concerning staff. The purpose of the WICHE MIS Program is to make it possible to derive data which will be truly comparable for interinstitutional comparisons, while allowing institutional autonomy in such matters as coding and file structure. One of the major purposes of this section of the Dictionary is to obtain longitudinal data depicting changes in characteristics over a period of time. The criteria for inclusion of data elements are: (1) necessary for completion of the Higher Education General Information Survey (HEGIS); (2) likely to be needed for the Student Flow Model, cost exchange procedures, and the Resource Requirements Prediction Model; (3) necessary to link operational files together for the derivation of information; and (4) basic to institutional record keeping. The 4 categories of staff-related elements are: demographic data, training and professional data, employment data, and activity data. To define each data element, the Dictionary provides a number, title, description, and comments needed for further clarification. The anticipated utility of each element is indicated. After review of this edition, a second is planned. (AF)

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- ... to increase educational opportunities for westerners.
- ... to expand the supply of specialized manpower in the West.
- ... to help universities and colleges improve both their programs and their management.
- ... to inform the public about the needs of higher education.

The WICHE Management Information Systems Program was proposed by state coordinating agencies and colleges and universities in the West to be under the auspices of the Western Interstate Commission for Higher Education. The MIS Program proposes in summary:

To design, develop, and encourage the implementation of management information systems and data bases including common data elements in institutions and agencies of higher education that will:

- provide improved information to higher education administration at all levels.
- facilitate exchange of comparable data among institutions.
- facilitate reporting of comparable information at the state and national levels.

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DATA ELEMENT DICTIONARY: STAFF

A Technical Report Concerning Staff Related Data Elements in the
WICHE Management Information Systems Program

FIRST EDITION

Technical Report 8

Prepared by

Charles R. Thomas

in cooperation with

Members of the Data Elements Task Force

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April 1970

DATA ELEMENT DICTIONARY
Staff Related Elements Section

FIRST EDITION

TABLE OF CONTENTS

	Page
Introduction	1
Dictionary Organization and Format	4
Key to Columns Used in this First Edition.	6
Alphabetical List of Elements.	7
Alphabetical List of Elements by USES.	8
Staff Related Elements	11
Members of the Data Element Task Force	29
Members of the Analytical Studies Task Force	30
State Data Element Review Representatives.	31
Comments on File Structure	32

INTRODUCTION

This document is the first edition of the Staff Related Elements Section of the DATA ELEMENT DICTIONARY developed as part of the WICHE Management Information Systems Program. The elements in this section apply to both current and historical data concerning Staff.

The foundation of the WICHE MIS Program will be a body of uniform data elements which all participating institutions will use to some degree in building their data base. Compatibility of information exchanged across institutional lines can be achieved only with uniformity of the data elements from which all subsequent data and information will be derived. Hence, identification of the discrete data elements which will be incorporated in the data bases of institutions participating in the WICHE MIS Program is an early developmental task of major importance. The Staff Related Elements Section of the DATA ELEMENT DICTIONARY is the second of five sections which will be included in the total dictionary. In order to place the Staff Related Elements Section in its proper perspective, all of the DATA ELEMENT DICTIONARY Sections are listed below.

- I: Student Related Elements
- II: Staff Related Elements
- III: Facilities Related Elements
- IV: Course Related Elements
- V: Finance Related Elements

The preliminary draft of this publication indicated a sixth section dealing with data elements related to major equipment. This section has been incorporated into the Facilities Related Elements Section. The Course Related Elements Section was previously referred to as the Curricular Related Elements Section.

The five sections of the DATA ELEMENT DICTIONARY are not intended to represent specific institutional files. Appendix B contains further comments on file structures.

The Staff Related Data Elements presented in this first edition are not fixed. It is anticipated that as analytical models and formulae are constructed for use in the WICHE Management Information Systems Program, additional data elements may be needed, and some of those now identified may be eliminated from the list. The data element base and the analytical models are inextricably linked together and neither the data base nor the models can be made independent of one another. It is reasonably safe, however, to assume that most of the Staff Related Elements listed in this first edition will remain in future editions of the DATA ELEMENT DICTIONARY.

This edition of the DATA ELEMENT DICTIONARY presents definitions of data elements important to the development of the WICHE MIS Program. Derived data elements have not been included when the basic elements used to compute the derived element are present. The criteria for inclusion of data elements in this edition are:

1. Necessary for completion of the Higher Education General Information Survey (HEGIS).
2. Likely to be needed for Cost Exchange Procedures.
3. Likely to be needed for the Student Flow Model.
4. Likely to be needed for the Resource Requirements Prediction Model.
5. Necessary to link operational files together for the derivation of information.
6. Basic to institutional record keeping.

The Staff Related Elements identified in this publication are not intended as a complete list of all data elements an institution will need for its management and reporting purposes. Most colleges and universities will have unique management information needs which will

require unique data elements. Further, routine operations of institutions will require data elements not included in this Dictionary. No data element dictionary can be expected to provide a list of items which would be exhaustive in the context of unique data needs of institutions. Therefore, most institutions will be able to identify staff related data elements, in addition to those listed in the dictionary, which they would wish to or must collect for their own purposes.

A second edition of the DATA ELEMENT DICTIONARY is planned. This second edition will incorporate changes resulting from (1) reactions by the higher education community to the first edition, (2) early experience with WICHE MIS Models, and (3) additional efforts by the MIS Staff in the area of higher education information systems. The second edition will also be expanded to include technical information such as suggested code structures, detailed category definitions and programming aids.

Dictionary Organization and Format

The Staff Related Elements identified in this section of the DATA ELEMENT DICTIONARY have been grouped into four categories for convenient examination. The numbers attached to the elements are intended only to facilitate identification and location of the elements and have no implication for standard coding practices. Also, the lettered categories indicated for elements are not intended to imply any coding structures.

The four categories of Staff Related Elements are:

1. 000-099 DEMOGRAPHIC DATA
2. 100-199 TRAINING AND PROFESSIONAL DATA
3. 200-299 EMPLOYMENT DATA This section defines a series of data elements that apply to each budgetary appointment held by the staff member. The same data elements will appear in historical files. All elements must be identifiable as a group with each specific position or appointment, although the elements may be maintained in different files.
4. 300-399 ACTIVITY DATA This section defines a series of data elements that deal with the activities of staff members. These activities may be gathered by some form of faculty activity report or in some cases a periodic sampling. The data elements may be gathered for each staff member and distributed to his various appointments or separately gathered for each appointment. Again the same data elements will appear in historical files.

Although the DATA ELEMENT DICTIONARY deals with elementary data items, certain data elements must be appropriately coded to establish a relationship between files for the derivation of information for analytical purposes. An example of this situation is the Course Assignments Element (340) listed in this section of the Dictionary which must relate to the appropriate identifiers in the Course Related Elements Section.

Also, the Account Number Element (203) in the Employment Data Category of this section must relate to the Finance Related Elements Section of the Dictionary. These "linking" elements are identified in the comments column of the Dictionary.

Some of the data elements represent a combination of several component parts. This situation occurs when a collection of discrete items of information is required to provide a single useful or meaningful data element. For example an address is composed of a house number, street name, city, state and zip code. These components have only limited usefulness in isolation. It is usually only in combination that they form a useful data element. This accounts for the multiple parts listed in association with some data element titles.

In order to define each data element, the Dictionary provides (1) a number, (2) a title, (3) a description and (4) comments needed for further clarification. In addition, the publication indicates the anticipated utility of each element. These indications must be preliminary in this edition since the Cost Exchange Procedures and the Planning Models are not yet completed.

Key to Columns Used in This Dictionary

Number Column -- Number for identification of specific elements with a structure to indicate category, as explained earlier. (The numbers are not intended to be a standard coding scheme).

Title Column -- A brief identification for the data element.

Comments Column -- Additional information as may be needed to further define the data element, justify its inclusion, or identify its relationship to other elements.

USES Columns:

HEGIS -- "X" in this column indicates that this element is needed for the compilation of information for the Higher Education General Information Survey (HEGIS report)

Level III -- Cost Exchange "X" in this column indicates that this element is likely to be needed for exchange of comparable cost information between participating institutions (associated with WICHE MIS Level III participation).

Level IV -- Models "P" in this column indicates that this element is likely to be needed for the WICHE MIS Resource Requirements Prediction Model (RRPM-1)

"F" in this column indicates that this element is likely to be needed for the WICHE MIS Student Flow Model.

"S" in this column indicates that this element is likely to be needed for a future WICHE MIS simulation model.

(This column is associated with WICHE MIS Level IV participation)

DATA ELEMENT DICTIONARY
STAFF RELATED ELEMENTS

Data Element Index

Alphabetical Index

Number	Name	Page
208	Academic Rank	23
203	Account Number	21
202	Appointment Code	21
211	Appointment Effective Date	25
212	Appointment Expiration Date	25
204	Appointment Percentage	21
206	Appointment Period	22
205	Appointment Salary Budgeted	22
201	Appointment Title	21
213	Appointment Type	26
003	Birth Date	11
004	Birth Place	11
014	Campus Office Address(s)	14
009	Citizenship Status	12
340	Course Assignments	27
012	Current Local Address	13
007	Dependents	12
008	Emergency Contact	12
112	First Date of Appointment	20
102	Graduate Education	15
103	Highest Academic Degree or Diploma	16
106	Honorary Degrees and Awards	17
341	Instructional Activities	27
108	Licenses, Certificates and Registrations	17
006	Marital Status	12
011	Military Status	13
001	Name	11
342	Non-Instructional Activities	28
013	Permanent Address	14
015	Physical Handicap	14
105	Post-Doctoral Education	17
104	Post Graduate Study	16
111	Previous Employment	20
107	Professional Affiliations	17
110	Publication Record	19
010	Race	12
214	Sabbaticals and Leaves of Absence	26
113	Separation from Institution	20
005	Sex	11
002	Social Security Number	11
109	Special Competencies	18
207	Staff Benefits	22
209	Support Staff Skill Level	24
210	Tenure Status	25
101	Undergraduate Education	15

DATA ELEMENT DICTIONARY
STAFF RELATED ELEMENTS

Data Element Index

HEGIS

Number	Name	Page
208	Academic Rank	23
204	Appointment Percentage	21
205	Appointment Salary Budgeted	22
213	Appointment Type	26
009	Citizenship Status	12
103	Highest Academic Degree or Diploma	16
005	Sex	11

DATA ELEMENT DICTIONARY

STAFF RELATED ELEMENTS

Data Element Index

Cost Exchange (Level III)

Number	Name	Page
208	Academic Rank	23
203	Account Number	21
204	Appointment Percentage	21
206	Appointment Period	22
205	Appointment Salary Budgeted	22
213	Appointment Type	26
003	Birth Date	11
014	Campus Office Address(s)	14
340	Course Assignments	27
103	Highest Academic Degree or Diploma	16
341	Instructional Activities	27
342	Non-Instructional Activities	28
005	Sex	11
002	Social Security Number	11
207	Staff Benefits	22
209	Support Staff Skill Level	24
210	Tenure Status	25

DATA ELEMENT DICTIONARY
STAFF RELATED ELEMENTS

Data Element Index

Model (Level IV)

Number	Name	Model	Page
208	Academic Rank	P	23
203	Account Number	P	21
211	Appointment Effective Date	P	25
212	Appointment Expiration Date	P	25
204	Appointment Percentage	P	21
206	Appointment Period	P	22
205	Appointment Salary Budgeted	P	22
213	Appointment Type	P	26
003	Birth Date	S	11
014	Campus Office Address(s)	P	14
340	Course Assignments	P	27
102	Graduate Education	S	15
103	Highest Academic Degree or Diploma	S	16
341	Instructional Activities	P	27
011	Military Status	S	13
342	Non-Instructional Activities	P	28
111	Previous Employment	S	20
113	Separation from Institution	S	20
005	Sex	S	11
002	Social Security Number	P	11
207	Staff Benefits	P	22
209	Support Staff Skill Level	P	24
210	Tenure Status	P	25
101	Undergraduate Education	S	15

NUMBER	TITLE	DESCRIPTION	COMMENT	USES			
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS	
001	Name	Legal name.					
002	Social Security Number			X		P	
003	Birth Date	Month, day and year of birth.			X	S	
004	Birth Place	City, county and state (country) of birth.					
005	Sex			X	X	S	

NUMBER	TITLE	DESCRIPTION	COMMENT	USES			
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV	MODELS
006	Marital Status	Current marital status a) unmarried b) married.	Not IRS marital status for tax purposes. Institutional coding may include widowed, divorced or separated under unmarried.				
007	Dependents	Number of dependents including spouse.	Some institutions will maintain sex and year of birth of each dependent as individual elements.				
008	Emergency Contact	Name, relationship, address and telephone.	Institutional coding of this element should follow established Federal codes.				
009	Citizenship Status	An indication of whether or not staff member is a U. S. citizen.		X			
010	Race	Racial origin.	HEW Compliance Report specifies the following categories: a) Negro b) Oriental c) Spanish-American d) American-Indian e) Other.				

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
011	Military Status	<p>Current military status:</p> <ul style="list-style-type: none"> a) Non-veteran (selective service code) b) Active reserve or national guard c) Inactive reserve d) Discharged veteran e) Retired f) Active duty. 	<ul style="list-style-type: none"> 1) May be required to comply with state laws on military leave. 2) Used for veterans preference in some civil service systems. 3) Can be identified from selective service code. 			S
012	Current Local Address	<p>Record to include:</p> <ul style="list-style-type: none"> a) House number b) Apartment number c) Street or route d) City e) State f) Zip Code g) Telephone. 				

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
013	Permanent Address	Includes the same items as Current Local Address (Element 012).	May appear only if different from Current Local Address.			
014	Campus Office Address(s)	Record to include: a) Campus code b) Building code c) Building name d) Room number e) Campus telephone number.	1) Building code and room number are cross reference links to the Facilities Related Elements Section. 2) In case of multiple office addresses, a mailing address may be specified.	X		P
015	Physical Handicap	Requires special access arrangements to building, such as confined to wheel chair.				

NUMBER	TITLE	DESCRIPTION	COMMENT	USES			
				HEGIS	LEVEL III	LEVEL IV	COST EXCHANGE MODELS
101	Undergraduate Education	<p>A series of elements to record the staff member's undergraduate institutions and degrees or certificates:</p> <ul style="list-style-type: none"> a) Institution (F.I.C.E. Code or name) b) Undergraduate degree (certificate, BA, BS, etc.) c) Degree date (year) d) Major fields (HEGIS taxonomy). 				S	
102	Graduate Education	<p>A series of elements to record the staff member's graduate institutions and degrees:</p> <ul style="list-style-type: none"> a) Institution (F.I.C.E. Code or name) b) Graduate degree (MA, MS, PHD, etc.) c) Degree date (year) d) Major field (HEGIS taxonomy). 				S	

STAFF RELATED ELEMENTS

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
103	Highest Academic Degree or Diploma	<p>A code to indicate the highest degree, certificate or diploma held by the staff member:</p> <ul style="list-style-type: none"> a) No academic credential b) High School Diploma or GED c) Trade or Craft Certificate d) Professional Certificate e) Associate Degree f) Bachelor's Degree g) Master's Degree h) Professional Degree (first) i) Doctorate. 	<p>1) Honorary Degrees are not considered in this data element.</p> <p>2) According to HEGIS categories.</p> <p>3) Summary data element, sometimes can be derived from 101 and 102.</p>	X	X	S
104	Post Graduate Study	Credits beyond highest degree.	Generally used by community colleges.			

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
105	Post-Doctoral Education	A series of elements to record Post-Doctoral education to include: a) Institution (F.I.C.E. Code) or name b) Major Field (HEGIS taxonomy) c) Beginning and ending dates.				
106	Honorary Degrees and Awards	A listing of honorary degrees, awards and distinctions.				
107	Professional Affiliations	A listing of professional organization and learned society affiliations of the staff member.				
108	Licenses, Certificates and Registrations	A listing of specific credentials entitling the staff member to engage in practice. (MD, Legal Bar, CPA, etc).				

NICHE MANAGEMENT INFORMATION SYSTEMS PROGRAM
DATA ELEMENT DICTIONARY

STAFF RELATED ELEMENTS

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				MEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
109	Special Competencies	<p>A list of special interests, competencies and experiences such as:</p> <ul style="list-style-type: none"> a) Foreign Country experiences (name of country) b) Foreign Language competency c) Significant positions in: <ul style="list-style-type: none"> 1. Federal Government 2. State Government 3. Private Business 4. Military d) Significant performing or creative skills (theater, music, art, athletics) e) Other. 				

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
110	Publication Record	<p>A summary of the quantity of publications reaching publics outside the institution:</p> <ul style="list-style-type: none"> a) Papers presented b) Monographs c) Major Articles d) Books e) Inventions f) Other creative achievements. 	<p>It is recognized that quantity does not measure quality; however, most institutions record further details in this area for qualitative judgments.</p>			

STAFF RELATED ELEMENTS

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
111	Previous Employment	Last previous employment to include: a) Employer b) Geographic location c) Beginning or ending date d) Rank, skill level or title e) Salary (ending) and term of appointment.			S	
112	First Date of Appointment	Month, day, year of first appointment at this institution.				
113	Separation from Institution	Descriptors to include: a) Separation date b) Type c) Destination d) New rank, Skill level or title e) New salary.	This data element is desirable but difficult to obtain.		S	

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
201	Appointment Title	Descriptive title of a position or appointment.	Usually entered from a table of titles based on the appointment code.			
202	Appointment Code	A code to describe the category of position; e.g. a civil service position code.	Usually the code used for the list of appointment titles.			
203	Account Number	The institutional account number to which the salary for this appointment is charged.	This data element should indicate or link to the fund source, organizational unit and functional activity category. (see elements 340 through 342) It is a link to the Financial Related Elements Section.	X		P
204	Appointment Percentage	Percentage of full time employment during the term of employment. Expressed as a decimal fraction: full time = 1.00 half time = .50 etc.		X	X	P



STAFF RELATED ELEMENTS

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
205	Appointment Salary Budgeted	Amount of salary associated with this appointment.	1) Supplements, benefits and fees outside this contract are not included. 2) For hourly wage earners an annual salary should be estimated.	X	X	P
206	Appointment Period	Number of months to which this appointment applies.			X	P
207	Staff Benefits	Staff benefits associated with this appointment such as: a) Retirement b) Insurance c) Perquisites d) Tuition Benefits e) Other.			X	P

NUMBER	TITLE	DESCRIPTION	COMMENT	USES			
				HEGIS	LEVEL III POST EXCHANGE	LEVEL IV MODELS	
208	Academic Rank	Faculty Rank Categories for: a) Teaching Assistant b) Research Assistant c) Teaching Associate d) Research Associate e) Lecturer f) Instructor g) Assistant Professor h) Associate Professor i) Professor j) Other.	X	X		P	

STAFF RELATED ELEMENTS

NUMBER	TITLE	DESCRIPTION	COMMENT	USES			
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS	
209	Support Staff Skill Level	<p>Support staff skill level categorized into:</p> <ul style="list-style-type: none"> a) Officers and managers b) Professionals c) Technicians d) Office and clerical e) Craftsmen (skilled) f) Operatives (semiskilled) g) Laborers (unskilled) h) Service workers i) Apprentices. 	<p>These categories are described in the Fair Labor Standards Act, Description of Job Categories.</p> <p>RRPM-1 does not require disaggregate data for support staff, however future versions will likely deal with detailed skill levels.</p>		X		P

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
210	Tenure Status	Tenure code to indicate: a) Non-tenure b) Date of tenure.	Many levels of tenure may be utilized in an institution, however currently only two summary categories are indicated.		X	P
211	Appointment Effective Date	Date (month, day and year) this appointment begins.	Length of appointment can be derived from the effective and expiration dates.			P
212	Appointment Expiration Date	Date (month, day and year) this appointment ends.				P

STAFF RELATED ELEMENTS

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
213	Appointment Type	<p>Identification of the status or type of this appointment:</p> <ul style="list-style-type: none"> a) Regular b) Temporary c) Visiting d) Emeritus e) Post Doctoral f) Acting. 	<p>Post doctoral appointment distinguished from post doctoral student.</p>	X	X	P
214	Sabaticals and Leaves of Absence	<p>A record of official absences from the institution to include:</p> <ul style="list-style-type: none"> a) Beginning and Ending Dates b) Percent of pay c) Reason. 				

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
340	Course Assignments (see Course Related Elements Section)	A series of elements identifying sections of courses taught; to include: a) Term and year b) Subject field c) Course number d) Section.	1) This data element usually is the product of a procedure which matches faculty to courses. It is the link to the Course Related Elements Section and the Student Related Elements Section for the derivation of instructional activity measures. 2) Note that Instructor Identification is indicated as a linking element in the Course Related Elements Section.	X		P
341	Instructional Activities	Examples are: a) Student conferences b) Graduate thesis supervision c) Academic committees d) Development of instructional materials.	Information on these activities may be gathered by some form of faculty activity analysis. The WICHE MIS position on instructional activities is stated in "Faculty Activities Contributing to the Instructional Function in Higher Education," a report to the WICHE MIS Steering Committee, January 12, 1970.	X		P

STAFF RELATED ELEMENTS

NUMBER	TITLE	DESCRIPTION	COMMENT	USES		
				HEGIS	LEVEL III COST EXCHANGE	LEVEL IV MODELS
342	Non-Instructional Activities	<p>Examples are:</p> <ul style="list-style-type: none"> a) Administration b) Organized research c) Faculty committees d) Advising and Counseling Student Organizations e) Public Service Activities f) Miscellaneous activities such as coaching, external consulting, and professional organization service. 	Each Activity must be associated with the particular appointment for linking to the Finance Related Elements.	X		P

APPENDIX A

Development of the DATA ELEMENT DICTIONARY

All sections of the DATA ELEMENT DICTIONARY were developed in cooperation with the WICHE MIS Data Element Task Force. The members of the Data Element Task Force are listed below:

<u>Name and Position</u>	<u>Institution/Agency</u>
Mr. J. Spencer Carlson Director, Office of Student Services	University of Oregon
Mr. Roger M. Emanuel Coordinator, Models and Simulation	University of California
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Dr. Parker Fowler Systems Coordinator	Colorado Commission of Higher Education
Mr. R. Keith Martin Director, Management Systems Department	University of Washington
Dr. Keith Smith (Dec. 1968 to Aug. 1969) Associate Director	Board of Higher Education State of Illinois
Mr. David Nyman (Sep. 1969 - Present) Assistant Director for Data Systems	Board of Higher Education State of Illinois
Mr. George J. Turner Director of Information Systems	University of California

In addition to the efforts of the Data Element Task Force, the WICHE MIS Analytical Studies Task Force also reviewed each section of the DATA ELEMENT DICTIONARY. This group has responsibility for conceptualizing the models and formulae which will use the basic data elements to produce derived data and information important for institutional management. Members of the Analytical Studies Task Force are listed below:

<u>Name and Position</u>	<u>Institution/Agency</u>
Dr. Robert Adams Professor of Economics	University of California at Santa Cruz
Mr. James Farmer Director, Information Systems	The California State Colleges
Mr. John Keller Director of Analytical Studies	University of California
Dr. Thomas Mason Director of Institutional Research	University of Colorado
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Mr. Gordon Osborn Director of Analytical Studies	State University of New York
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Mr. James Ryan Vice President for Planning and Budgeting	University of Washington
Dr. Martin Zeigler Associate Provost	University of Illinois

Each section of the DATA ELEMENT DICTIONARY was published and distributed in preliminary draft form. The fourteen participating states held reviews of the preliminary draft with institutions in their state. The state representatives then met for a regional review to summarize comments

on the Dictionary. The fourteen state representatives for the regional review of the Course Related Elements Section were:

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APPENDIX B
Comments on File Structure

Some educators have expressed concern that the development and widespread use of uniform data systems will destroy institutional autonomy with regard to coding and file structure. The WICHE MIS Program is designed to allow institutional autonomy in such matters and, at the same time, to make it possible to derive data which will be truly comparable for interinstitutional comparisons. WICHE has published a technical report entitled, "Concepts Underlying Compatibility¹," which specifically speaks to this point.

In so far as this section of the DATA ELEMENT DICTIONARY is concerned, the elements are listed without reference to how they should be stored in a data system. No attempt has been made to define standard codes, field formats, or file structures, and the listing of items in this section of the Dictionary is in no way meant to imply that these elements necessarily must be kept in a specific file.

The major purpose of collecting some of the data elements included in this section of the Dictionary is to obtain longitudinal data depicting changes in characteristics over a period of time. For this reason, several of the elements will have to be stored in historical files as updated versions of the elements are collected. The precise method of storage for such historical data is considered by WICHE to be an institutional prerogative. It is only necessary that institutions participating at the various levels be able to produce the required longitudinal data when the need arises.

The WICHE MIS Program anticipates further publications dealing with suggested code structures and file formats to aid institutions on the threshold of the development of data systems.

¹Dr. Ben Lawrence, "The Concepts Underlying Compatibility in the WICHE Management Information Systems Program," Compatible Management Information Systems. Boulder, Colorado: Western Interstate Commission for Higher Education May, 1969.