

# GFS1004 Needs Analysis Report

## Executive Summary

This report outlines the findings of the needs analysis for a new training initiative focused on reporting resources for Student Support Officers (SSOs) and other staff managing graduate student funding. The analysis confirms a significant performance gap: SSOs are often unaware of, or unable to effectively use, existing reporting tools like the Student Integrated Reporting and Information System (SIRIS) dashboards and Graduate Financial Support Business Intelligence (GFS BI) reports. This leads to inefficiency, reliance on manually-created "shadow spreadsheets," and underutilization of powerful, self-service reporting capabilities.

The core business need is to increase utilization of GFS reporting resources and shift user behavior from manual data replication to confident self-service. The proposed training should focus not on memorizing a list of reports, but on "teaching users to fish", equipping them with the foundational knowledge to find, use, and customize reports to answer their specific questions.

This analysis recommends the development of a training solution focused on three key pillars:

1. **Find** (using the unified Student Services Reporting Catalog)
2. **Use** (understanding and customizing SIRIS dashboards vs. GFS BI reports)
3. **Ask** (knowing who to contact for help)

Success will be measured by an increase in SIRIS usage and a decrease in basic GFS reporting support tickets.

## Methodology

The findings and recommendations in this report are based on a qualitative analysis conducted through a series of structured meetings and interviews with key project stakeholders, subject matter experts, and members of the target audience. This multi-faceted approach was designed to triangulate the performance problem from business, technical, and end-user perspectives. The process included the following activities:

### Stakeholder Kickoff Meeting

A kickoff meeting was held with project sponsors and key team members from the Graduate Financial Support (GFS) and Institutional Research & Decision Support (IR&DS) teams. The primary goal of this session was to establish a shared understanding of the business problem,

define the high-level expectations for a training solution, and align on the project's desired impact. This meeting confirmed the core issue of underutilized reporting tools and established the guiding "teach people to fish" vision for the course.

### Subject Matter Expert (SME) Interviews

Targeted interviews were conducted with key SMEs to gather detailed information on the reporting landscape and existing resources:

- **IR&DS Team:** An interview with leadership and staff from the IR&DS team reinforced the "teach people to fish" strategy and confirmed the need to include content on customizing a SIRIS dashboard. They also initiated the discussion to broaden the course title from "Reporting in GFS" to better reflect the overarching task of reporting on graduate student funding.
- **SIRIS SME:** This interview focused on the technical capabilities, intended use cases, and unique value-adds of the SIRIS dashboards. Key insights included the importance of user customization, the power of derived fields, and the technical distinctions between SIRIS and traditional GFS BI reports.
- **Student Services Reporting Catalog SME:** This discussion centered on the purpose, structure, and current usage of the Tableau-based reporting catalog. The interview clarified its role as a central discovery tool and highlighted existing challenges related to user awareness and access permissions.

### Target Audience Interviews

Interviews were conducted with three Student Support Officers (SSOs) who represent the primary learner population for this training. These sessions were crucial for validating the problem statement and understanding the daily workflows, pain points, and workarounds currently employed by end-users. The SSOs confirmed the widespread confusion between report types, the heavy reliance on "shadow" Excel and Smartsheet systems for data manipulation, and the informal, "word of mouth" nature of current training. Their direct feedback and practical recommendations heavily informed the analysis of the performance gap and the proposed training solution.

### Project Background & Business Need

Stanford's Graduate Financial Support (GFS) and Institutional Research & Decision Support (IR&DS) teams, have identified a recurring and costly business problem. SSOs expend significant time and effort creating and maintaining shadow spreadsheets to track graduate student

funding. This work is often redundant, as the necessary data is already available through official reporting platforms like GFS BI reports and SIRIS dashboards.

The root cause is a knowledge and skills gap. Users either don't know where to find the right report for their task, don't understand the functional differences between the available tools, or lack the skills to customize reports to meet their needs.

This results in:

- **Wasted time and resources:** Staff are rebuilding tools that may already exist.
- **Data integrity risks:** Shadow spreadsheets are prone to error and quickly become outdated.
- **Underutilization of institutional investment:** The university has invested heavily in powerful reporting tools (especially SIRIS) that are not being used to their full potential.

The goal of this project is to address this gap by providing SSOs with the necessary skills and awareness to become self-sufficient in their reporting and data analysis tasks.

## Target Audience Analysis

The primary audience for this training is SSOs working with the graduate student population. However, the content will also be relevant to other financial and administrative staff who interact with GFS data.

The audience can be segmented into two main groups, each with distinct needs:

1. **Long-Tenured SSOs:** This group is often comfortable with established workflows, which may include legacy reporting methods or a heavy reliance on custom-built Excel sheets. They may be less aware of, or hesitant to adopt newer tools like SIRIS, viewing them as complex or unnecessary. The key for this group is demonstrating clear value and a low barrier to adoption of SIRIS reports.
2. **Newer SSOs:** This group is often overwhelmed by the sheer volume of information and systems they must learn. They are generally open to new tools but struggle with the lack of a clear, structured path to learning the reporting landscape. They need a foundational map to navigate the GFS BI/SIRIS reporting ecosystem effectively.

Both groups, as evidenced by interviews with current SSOs, currently resort to exporting raw data to Excel & Smartsheet to manipulate, sort, and consolidate information, even when the desired functionality exists within the native tool (e.g., SIRIS customization).

## Performance Gap Analysis

### Current State

- **Discovery is ad-hoc:** SSOs find reports through "word of mouth," email reminders from other teams (e.g., Nick Swan/GUS), or by navigating a confusing BI folder structure.
- **Tool confusion is high:** Users cannot articulate the difference between a "BI Report" and a "SIRIS Dashboard." As one SSO noted, "They're just all reports to me."
  - This prevents SSOs from leveraging the unique, powerful customization features of SIRIS.
- **Workarounds are the norm:** SSOs frequently export static data to create "Frankenstein" spreadsheets, manually joining funding and enrollment data or reformatting merged cells (a key friction point an SSO identified in SIRIS exports).
- **Reliance on shadow systems:** Complex Smartsheet/Excel files are maintained to replicate and consolidate data that is often already available in official systems.
- **Underutilization of resources:** Key tools like the Student Services Reporting Catalog are "an underutilized resource" that some SSOs don't know exists.

### Desired State

- **Discovery is centralized:** SSOs use the Student Services Reporting Catalog as their first stop to identify what reports are available across the university.
- **Users are tool-literate:** SSOs understand the fundamental difference between static GFS BI reports and customizable SIRIS dashboards, and know when to use each.
- **Self-service is the default:** Instead of exporting to Excel, SSOs use SIRIS's built-in features (drag-and-drop columns, save custom views, use includable fields) to customize their report views and save them for future use to answer their questions.
- **Support is targeted:** SSOs know who to contact (e.g., SIRIS support, GFS help) for advanced questions or new SIRIS dashboard requests, after first attempting to self-serve.

## Task & Content Analysis (Must-Knows)

Based on discussions with SMEs, the training must equip learners with the knowledge and skills to perform the following.

### Core Knowledge:

### 1. Where to Find Reports:

- **Primary path:** The Student Services Reporting Catalog
  - Adding a link to the Student Services Reporting Catalog on the GFS Reporting page was recommended.
- **Secondary path:** How to "favorite" a report in BI for future use.
- **De-emphasize:** Navigating the complex BI folder tree.

### 2. The Reporting Landscape (What's the Difference?):

- **GFS BI Reports:** Static, operational, good for specific tasks, cover populations SIRIS doesn't, such as postdocs & non-matrices.
- **SIRIS Dashboards:** Customizable, analytical, have value-added derived fields (e.g., Term GFS Aid Indicator), and join funding with plan/enrollment data.
  - Users can contact the IR&DS SIRIS team to explore development of custom dashboards for data that isn't available in current dashboards.
  - Understanding that both GFS BI reports and SIRIS dashboards are located in the BI folder and understanding how to recognize and access them.

### 3. How to Get Help & Stay Informed:

- How to request access to SIRIS.
- Who to contact for what (e.g., SIRIS support email for dashboard requests or issues, GFS for help with GFS BI reports).
- How to stay current (newsletters, etc.).

### Core Skills (How-Tos):

#### 1. Use the Student Services Reporting Catalog:

- Adjust report search parameters
- Perform a keyword search, interpret results, and link out to a specific report.

#### 2. Use a SIRIS Dashboard:

- Apply prompts/filters effectively.
- Customize views: drag-and-drop columns, add "includable" columns, and save the customization as a new default.
- Use derived fields to answer key questions (e.g., finding students with no aid).
- Export data effectively (using the Excel formatted option).

3. **Distinguish Report Types:** Given a specific business question (e.g., "Which of my doctoral students have no funding entered for spring quarter?"), identify whether a SIRIS dashboard or a GFS BI report is the appropriate tool.

## Constraints, Risks, and Open Questions

- **Risk - Reporting Catalog Access:** The Student Services Reporting Catalog is central to the proposed "teach to fish" strategy. However, many users are initially unable to access the reports provided.
  - Content on the process and prerequisite training required prior to gaining access to SIRIS dashboards should be included in the course content.
- **Risk - Naming Confusion:** The fact that GFS BI reports and SIRIS dashboards both live at bi.stanford.edu is a persistent source of user confusion. The training must address this head-on.
  - A long-term solution (e.g., relabeling the "Student Analytics" folder to include the term "SIRIS" as suggested by an SSO should be explored.
- **Constraint - Varied Departmental Needs:** As one SSO noted, a one-size-fits-all training may be challenging. The training design must focus on transferable skills and concepts rather than specific, niche reports.
- **Open Question - AI Policy:** Corrie Potter has noted the new university AI policy. A decision is needed on what guidance to include regarding the use of GFS/SIRIS data with university-approved AI tools.
  - Corrie Potter and Karen Cooper will provide content guidance for this area.
- **Open Question - Student Services Reporting Catalog Direct Link:** It was suggested that adding a link to the Student Services Reporting Catalog to the Reporting page of the GFS website would simplify access for SSOs.

## Initial Recommendations

- **Adopt a "Teach to Fish" Instructional Strategy:** The course, potentially re-titled *"Reporting on Graduate Student Funding,"* should be structured around the Find > Use > Ask model. The focus must be on building analytical capability and resourcefulness, not on memorizing report names.
- **Develop Blended Learning & Performance Support:**

- **Core Online Module:** A concise online course covering the "Must-Know" content and skills identified in the "Task and Content Analysis" section.
  - This would serve as the formal training component.
- **How-To Guides:** Create simple, step-by-step online guides for core tasks that can be easily accessed by the SSO community.
  - Recommended job aids could include:
    - How to Customize and Save a SIRIS View
    - GFS BI vs. SIRIS: Which Tool Do I Use?
    - Using the Student Services Reporting Catalog
- **Create a Vanity URL for Reporting Access:**
  - Similar to [Learn-GFS.Stanford.edu](https://learn-gfs.stanford.edu), a vanity URL, such as "Reports-GFS.Stanford.edu" would be an easy to recall means for accessing content on the [GFS Reporting page](#).
    - SSOs have suggested that "desktop swag" with reporting access link information would be helpful for increasing awareness of SIRIS dashboards and resolving in-the-moment reporting issues.
- **Draft Preliminary Learning Objectives:** Based on my analysis, I propose the following draft objectives for the course:
  - *Upon completion, learners will be able to:*
    - Utilize the Student Services Reporting Catalog to select the most relevant graduate student funding reports or dashboard.
    - Differentiate between the capabilities of GFS BI reports and SIRIS dashboards.
    - Demonstrate the process of navigating the BI Folder Structure to locate GFS BI reports and SIRIS dashboards.
    - Utilize SIRIS dashboard descriptions to select the correct dashboard for answering a specific business question.
    - Customize a SIRIS dashboard to answer a specific business question and save the view for future use.
    - Illustrate the process for identifying the correct support channel for reporting questions, access requests or SIRIS dashboard customizations.
- **Establish Evaluation Metrics Now:** Before course launch, we must capture baseline data to measure the impact of this training.

- **Baseline Data:**
  - Snow ticket volume for BI report requests (from Wanapa).
  - GFS BI report usage numbers (from ET reporting team).
  - Current SIRIS usage metrics (from Jen Welden).
- **Success Indicators:**
  - Increase in SIRIS usage and customization.
  - Decrease in basic, "how-to" Snow tickets.
  - Increase in targeted, sophisticated support emails to the SIRIS team.

## Next Steps

1. **Analysis Report Approval:** Project stakeholders to review this report and approve the document.
2. **Resolve Open Questions:**
  - Finalize content on AI policy for this training (Action: Corrie Potter/Karen Cooper).
  - Determine if a course title change from “*Reporting in GFS*” to “*Reporting on Graduate Student Funding*” is warranted (Action: Corrie Potter/Karen Cooper/Liz Silva).
3. **Move to Design Phase:** Upon approval of this report, the next step will be to develop a detailed content outline and storyboard for the online course module.