Improving Institutional Data Consistency

Building a shared reporting foundation for more reliable, efficient, and sustainable decision-making

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October 19th, 2026

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The Challenge with Our Current Environment

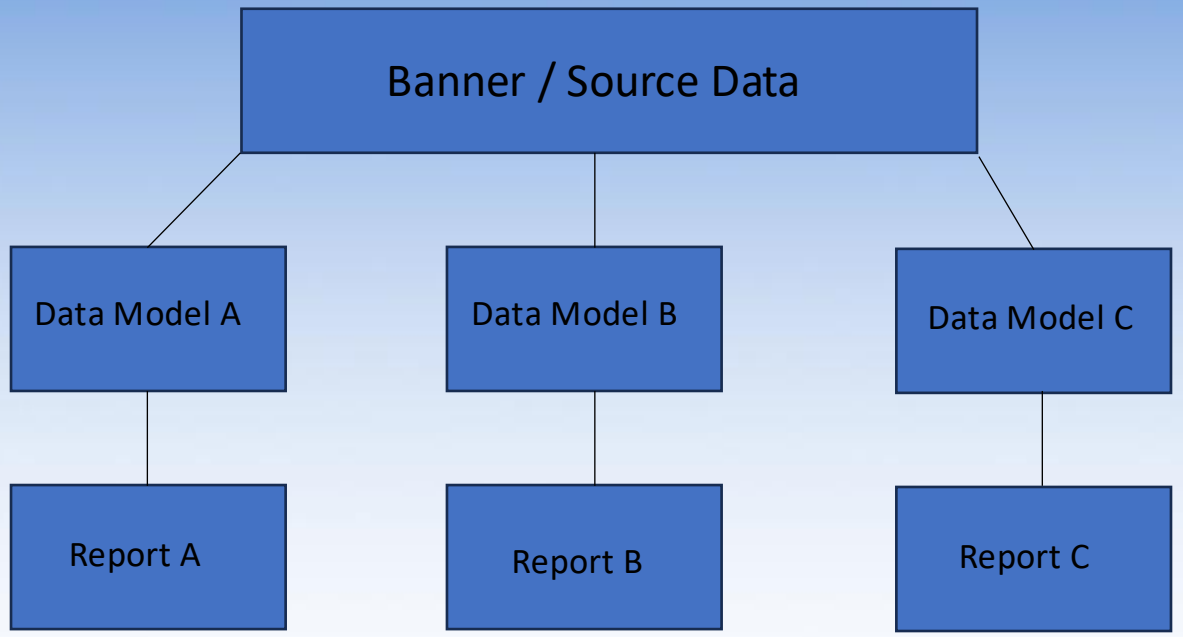
Key takeaway: We have strong reporting tools, but not a single, shared reporting foundation.

- Reports have been developed individually over many years using their own logic, calculations, and definitions.
- Data metrics may be defined differently depending on who created the report.
- Data requests are often similar to existing reports but require slight variations or additional filters.
- There is no single source of truth.
- This structure has accumulated over time, making the reporting environment increasingly difficult to maintain and standardize.
- Users may be unsure which reports are available, where to find them, or which report should be used for what purpose.

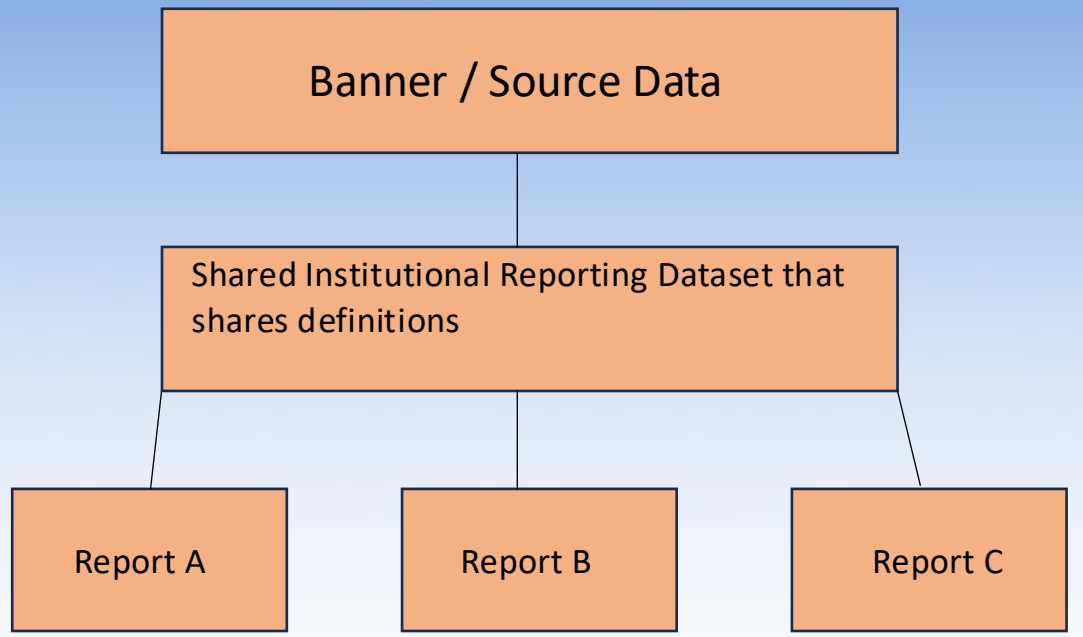
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Current Reporting Structure vs. Future Reporting Structure

Current Structure



Future Structure



While each report may show similar data. The data is being loaded several times, and the logic of the data model may be different between reports

Each report gets its data from one source of truth ensuring consistency across reports while only loading the data once.

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Why make this change?

- As Barton becomes increasingly data-driven, we must:
  - Improve consistency in institutional data
  - Create one source of truth
  - Reduce maintenance
  - Reduce the number of reports that we have and the number of redundant data refreshes that take place
  - Standardize logic and calculations for key metrics
  - Make reports faster and easier to create
  - Make Power BI more user-friendly for everyone

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How will IE accomplish this vision?

- We started doing the initial work on this as early as April 2026 with evaluating all our Power BI reports and documenting their purpose, who requested them, and evaluating usage metrics to determine if the reports were being used. Through the initial cleanup process, we went from approximately 600 reports to approximately 300.
- The groundwork is already being done to build the shared data model.
- Many reports will need to be rebuilt to be updated and connect to the data model. Some reports will be incorporated into others.
- We recently tested this idea on a smaller scale in the form of budget reports by making a single Master Budget dataset that connects to over 50 budget reports.

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What will change and what will stay the same?

Key takeaway: These changes are designed to improve data consistency and reliability while also making it easier for users to find the data they are looking for. We do not intend to take away reports that are relied upon.

- For now, HR and finance related reports will not change. During this initial implementation, we are focusing solely on student, course, and enrollment-based reports. Some popular examples include the Scheduling Matrix, Course Search, Student Directory, and Class Rosters.
- Some reports that are very similar to other reports in scope / purpose will be combined which will possibly involve name changes.
- A full list of new reports will be published with their functionality and purpose.
- All reports will be published in the same place, and appropriate users will be given access.
- Some report fields may be named differently to stay the same across multiple reports. For example: “ID” might become “Student ID”.
- IE will continue with our normal processes. Data requests will not slow down. This is a long-term project that will happen mostly in the background of our daily operations.

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How will the transition happen?

- There are approximately 100 reports that will be remade / combined.
- As reports are remade, they will be tested for accuracy.
- The current published versions of these reports will not be deleted.
- Once all reports have been remade or combined, they will be published and access to them will be determined.
- All Power BI users will be notified of the changes and directions will be given on how to access the new reports.
- The old versions of the reports will be archived.
- Other report types will then be evaluated for the same process.

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How can you help?

- Ask your teams which reports they value most for their jobs and send them to me. These will be prioritized.
- Provide me with feedback and additions you would like to see on current reports.
- Test new reports and provide feedback when asked.

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Questions?

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