**Categories of Data: Operational, Strategic, and Official**

***Operational data:***  *Volatile data generated by transactional systems to facilitate teaching, research, and service missions (e.g., employee appointment history or departmental directories)*

Operational definitions of HR data are developed for the purpose of appointing, promoting, tenuring, and paying employees to conduct or support instruction, research, and public service on behalf of the University. Operational definitions require the most standardization because they must address SUNY Board of Trustees (BOT) and UB policies on promotion, tenure, and compensation. The attached faculty matrix was developed to clearly categorize faculty. Per SUNY BOT policies, the definitions of these faculty categories are based on the titles into which faculty are appointed. The close relationship between titles and faculty groups underscores the need to carefully review the expectations of new faculty given a specific title. The title of Instructor may not appear to some as belonging on a tenure ladder, but SUNY BOT policy declares this as a tenure track position and thus it carries the operational demands that such a position entails.

***Strategic data****: Static, transformed operational data used to provide a consistent representation of the campus and conduct local planning or reporting, based on local goals (e.g., faculty cohorts, or promotional tenure rates).*

Strategic definitionswill vary according to the strategic goals being considered. In the the Office of the Provost, discussions of faculty center on those who typically perform instructional, research, and service duties on one of UB’s three campuses. These faculty usually meet the following criteria:

* Paid (FTE > 0)
* Not on the Librarianship tenure path
* Not appointed to the Equal Opportunity Center (EOC)

The above criteria, though often routinely applied to strategic analysis of faculty activity, should not be considered as absolutes when strategic questions pertain to a faculty group that would ordinarily be excluded. In strategic matters, the question at hand establishes the proper definition within appropriate parameters (e.g., a state line or unpaid faculty appointment; appointment to an academic unit and/or department; etc.) If a resource is to be allocated to all instructional faculty, excluding unpaid faculty from reports that inform that resource allocation is inappropriate.

Resource allocation questions yield a slightly different strategic definition of faculty in the Office of Resource Planning. Due to the office’s emphasis on ongoing budget planning, only those faculty funded from personal services regular (PSR) accounts are included. Those with temporary services funding are excluded. Resource Planning also classifies subgroups according to SUNY BOT operational definitions, based on title, rather than creating exceptions based on local intent (e.g., Visiting Associate Professors in Law are deemed non-ladder based on their title).

Although strategic definitions of employees and employee activities leave room for refinements to fit the topic at hand, local definitions outside the boundaries of what is typical for operational or strategic activities can yield results that are inconsistent with other initiatives or difficult to reproduce. When definitions fall outside the norm, the onus is on the person using the data to provide definitional clarity, context, and rationales for other data users and requesters. Extended footnoting of tables and charts is also recommended.

***Official data:*** *Static, transformed operational data used to provide a consistent representation of the campus as defined by external agencies for their use (e.g., Middle States or IPEDS reporting)*

Official definitions may be viewed as external reporting definitions. These definitions are set by the agency requesting a report and reflect that agency’s goals and concerns. Middle States institutional profiles, for instance, demonstrate an interest in the instructional mission of faculty by including only those faculty whose appointments explicitly include a full or partial assignment to instruction. In practice, the Office of Institutional Analysis responds by excluding research faculty, EOC faculty, and librarians. IPEDS reports, on the other hand, indicate a broader federal view of the faculty mission and include both research and EOC faculty.

Strategic and official definitions are further distinguished from operational definitions in that they require capture of HR data in a snapshot taken at a set point in time each year. A critical element of strategic and official work is that it is reproducible, though admittedly retroactive adjustments after the snapshot date may improve accuracy. As internal and external reports are often used to support trend analysis - for example, Middle States accreditation reports require UB to replicate staffing numbers previously provided in interim reports - consistency in the timing and method of data collection supports the the validity of such analysis in the eyes of key decision makers as long as post-snapshot adjustments are not seen as major. The Office of Institutional Analysis takes UB faculty and staff snapshots on November 1 and March 1 of each year. Given that these dates occur fairly late in each term, it is expected that few retroactive adjustments will be made on operational systems after that date and marked differences in coverage and data are unlikely.