FREE RESOURCE

Data & AI Readiness Checklist for Colleges

Tick every statement that is true at your college today; each unticked item is a place to start, not a failure. It takes about 15 minutes and is written for CIOs, institutional research directors, and cabinets or AI task forces planning a data or AI investment.

Answer it together if you can: one person from IT, one from institutional research, and one from an operational office such as financial aid or the registrar. Where your answers differ, that difference is itself a finding.

This is a self-check, not a score. There are no points to add up and no pass mark.

1 Purpose and results

A data program pays off when it is tied to what the college exists to do and to results someone outside IT would notice.

- [ ] We can say in one sentence how better data serves our mission and the students and communities we serve.
- [ ] We know who depends on the data: IT, institutional research, operational offices, leadership and the board.
- [ ] We have asked those groups what they need from data, rather than assuming it.
- [ ] We agreed what would be different if the program worked (for example, fewer disputes over numbers) before choosing a platform.
- [ ] Our data roadmap is phased, starts where value is highest, and keeps daily reporting running.

2 People and governance

Trusted data is a team result: IT holds the systems, institutional research holds the meaning, and operational offices hold the business rules.

- [ ] Every key data domain (student, finance, HR and payroll) has a named owner outside IT.
- [ ] A data governance group meets regularly and can make decisions, not only recommendations.
- [ ] Institutional research takes part in data decisions from the start, not after reports are built.

- [ ] Operational offices such as financial aid and the registrar have a voice in what gets built first.
- [ ] Leadership has said which few measures matter most to the cabinet and the board.

3 Definitions and metrics

Most reporting conflicts are definition conflicts: every office is right by its own rules.

- [ ] When two offices report headcount or FTES for the same term, the numbers match.
- [ ] Our key measures (headcount, FTES, retention, completion, cost per student) have written definitions with a named owner.
- [ ] Those definitions are encoded once, in a shared model, not rebuilt report by report.
- [ ] Census-day snapshots are kept, so a past term's numbers can be reproduced exactly.
- [ ] IPEDS, state (such as MIS and SCFF in California), and accreditation reports can be rerun and audited without rebuilding the logic.

4 Data platform and reporting

A governed platform lets every report and every AI tool read the same numbers, and keeps working when systems change.

- [ ] Data from Banner and our other campus systems lands in one governed platform, not in scattered extracts and spreadsheets.
- [ ] Analysts no longer query Banner directly or depend on Argos for core reporting, or there is a dated plan to retire them.
- [ ] We know how many reports we have, who uses them, and which ones we could retire.
- [ ] History is preserved, so year-over-year reporting survives changes such as a new Chart of Accounts.
- [ ] Every number on a leadership dashboard can be traced back to its source, with documented lineage.
- [ ] Pipelines and models are tested automatically, so errors are caught before leaders see them.

5 Privacy, security, and AI readiness

AI is only as trustworthy as the definitions and controls behind it.

- [ ] Access to student, HR, and finance data is granted by role, and FERPA-protected data is clearly marked.
- [ ] The college has an AI use policy that says which data may and may not go into AI tools.
- [ ] Staff have an approved, secure place to use AI on institutional data, so they are not pasting it into public tools.

- [ ] We have chosen where AI models may run for our data: a vetted cloud service, our own tenant, or fully private.
- [ ] Any AI answer that reaches students, staff, or the board is reviewed by a named person before it is used.
- [ ] We have one or two specific AI use cases with a measurable benefit, rather than a general wish to use AI.

6 Skills and sustainability

A platform is only an asset if your own staff can run and extend it.

- [ ] At least two people on staff can maintain and extend our data pipelines and models.
- [ ] Code and definitions live in version control, with documentation and runbooks.
- [ ] We could change a vendor or consultant without losing what was built.
- [ ] Analysts and power users in operational offices are trained to serve themselves safely.
- [ ] Funding for the data program is planned beyond one budget year.

What your answers mean

Where your unticked items cluster tells you where to start. Most colleges begin with sections 1 to 3, because a platform built before purpose and definitions are settled tends to repeat old conflicts faster.

1. Purpose and results, or 2. People and governance

Agree the mission, owners, and results first. A short, structured assessment with IT, research, and operations at one table usually settles them in weeks.

3. Definitions and metrics

Agree and document the handful of measures leaders argue about, then encode them once in a shared model.

4. Data platform and reporting

Plan a phased platform build that starts with the subject area where value is highest and keeps daily reporting running.

5. Privacy, security, and AI readiness

Put an AI use policy and data guardrails in place before any pilot, and pilot only on data you already trust.

6. Skills and sustainability

Build alongside your staff, with documentation and training, so the work stays yours.

For a second opinion on your answers, book a free 30-minute readiness call at nvlynx.com/book or write to info@nvlynx.com. NvLynx Analytics · nvlynx.com/readiness-checklist