College Scorecard: Cluster Analysis

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Introduction

This is an exploratory analysis of the U.S. Dept. of Education College Scorecard database. My intent is to investigate patterns amongst the colleges as visualized using t-distributed Stochastic Neighbor Embedding (t-SNE). This method projects the high-dimensional data into two dimensions. From there, I can apply hierarchical clustering to identify clusters in the new 2-D space.

Prepare Data

We read in the College Scorecard dataset and convert columns into Bayes factors, which accentuate differences amongst the colleges. Colleges having a disproportionately high number of students with a certain attribute – say, an SAT in excess of 1400 – will have highly positive Bayes factors for that attribute.

I strip out a lot of the variables that define the student body demographics. The idea is that I'd like to identify structure in the "outcome" variables – things like academic disciplines, completion rates, future earnings, credit default rates, etc. – and then later check if this structure is correlated to demographics – things like geographic location, campus setting, student ethnicity, etc.

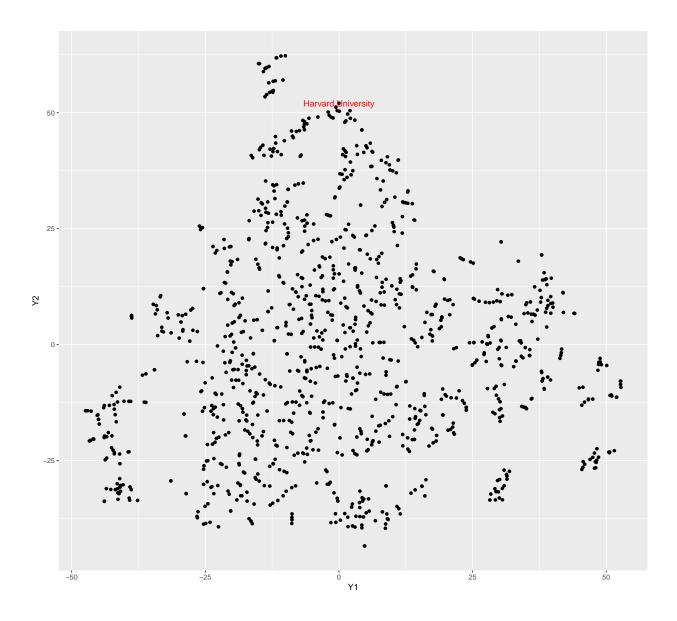
```
glmdata_all <- DataSpec$studentBF %>%
   dplyr::select(
      c(-1, -(3:8)), -matches('_(WHITE|BLACK|ASIAN|OTHER|HISP|NRA|AIAN|UNKN)|2MOR|UNKN|NHPI|AIAN|BF_male|
      -matches('Challenge|_DEP_STAT_|notvet|le24y|OUTOFSTATE|prior|(^BF_[g1][et].+[0-9]+K$)|locale|FarWes
) %>%
   select_if( .predicate = function(x) any(x != x[[1]]) ) %>%
   filter( complete.cases(.) )
tsne_mat_all <- glmdata_all %>% select(-College) %>% as.matrix() %>% scale()
```

Perform t-Distributed Stochastic Neighbor Embedding (t-SNE)

Now, I'll map the data into a 2-D space using t-SNE. Hopefully, it will be easy to see clusters of colleges.

It takes a bit of trial and error (short of doing a formal hyperparameter optimization) to arrive at hyperparameters capable of generating discernible structure in a 2-D scatterplot.

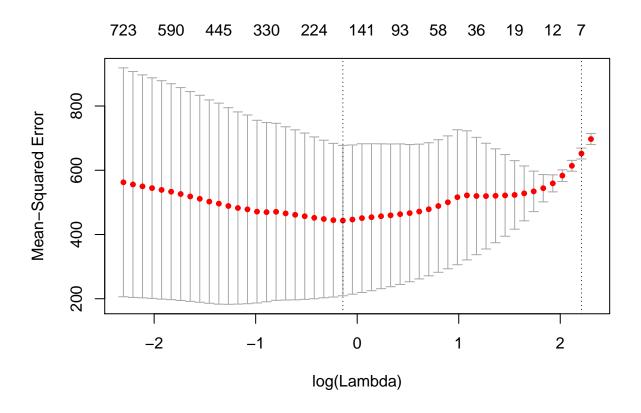
```
set.seed( 173 )
tsne_all <- Rtsne( tsne_mat_all, perplexity = 10, initial_dims = 50, theta = 0.5, max_iter = 2000 )
# Rotate coordinates so that high-prestige colleges appear at high Y2 coordinates,
# i.e. in the top center of the plot.
i_harvard <- grep( 'Harvard', glmdata_all$College )</pre>
harvard_coord <- tsne_all$Y[i_harvard,]</pre>
harvard_angle <- atan(harvard_coord[2]/harvard_coord[1])</pre>
rotate_angle <- pi/2 - harvard_angle
rotation_matrix <- matrix(</pre>
  c(cos(rotate_angle), sin(rotate_angle), -sin(rotate_angle), cos(rotate_angle)),
  2,2, byrow = TRUE
tsne all$Y %<>% { (.) %*% rotation matrix }
if( abs(tsne_all$Y[i_harvard,2]) < abs(tsne_all$Y[i_harvard,1]) ){</pre>
  tmp <- tsne_all$Y[,1]</pre>
 tsne_all$Y[,1] <- tsne_all$Y[,2]</pre>
  tsne_all$Y[,2] <- tmp
if( tsne_all$Y[i_harvard,2] < 0 ){</pre>
  tsne_all$Y[,2] <- -tsne_all$Y[,2]
tsne_all$Y %>%
  as_tibble() %>%
  setNames(c('Y1','Y2')) %>%
    ggplot(.,aes(x=Y1,y=Y2)) +
      geom_point() +
      geom_text(
        data=(.) %>% mutate(College=glmdata_all$College) %>% filter(grep1('Harvard',College)),
        mapping=aes(label=College),
        color='red',
        size=4
      )
  } %>%
  print()
```



Find Underlying Dimension Driving 2-D Structure

Using glmnet, I perform variable selection modeling of the 2-D t-SNE coordinates as responses vs. the original features from which the t-SNE coordinates were found. This way we'll have an approximate linear model showing which features contributed to which coordinate. As such, we'll have the basis for plotting a biplot of colleges overlayed on feature dimensions in 2-D, analogous to a PCA biplot.

```
plot( tsne_glmnet_all )
```

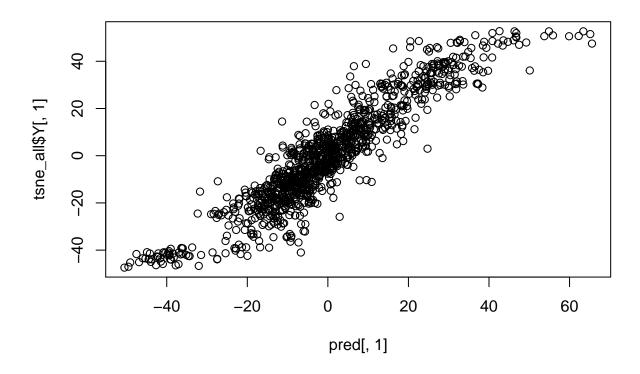


Check the Predictions

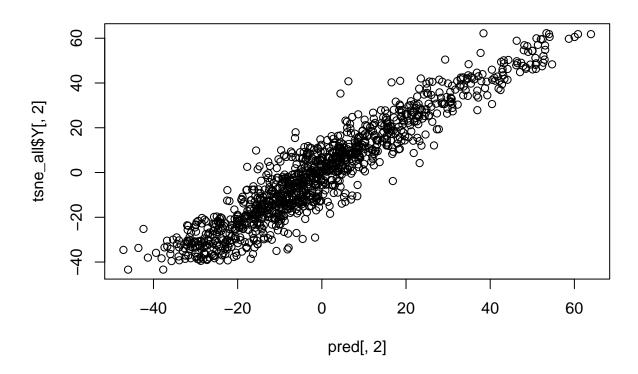
It can be tricky to find a subset of features and their interactions that both describe the t-SNE coordinates well and do not suffer from extreme collinearity, which can make the validation error at low lambda explode when applying glmnet.

Judging from the cross-validation curve above and the observed vs. predicted plots below, it looks like we've got a pretty good model.

```
lambda <- tsne_glmnet_all %$% lambda.min #{ exp( mean(log(c(lambda.min,lambda.1se))) ) }
pred <- tsne_glmnet_all %>% predict( newx = mmat, s = lambda ) %>% drop()
plot(pred[,1],tsne_all$Y[,1])
```



plot(pred[,2],tsne_all\$Y[,2])



Visualize the Colleges in 2-D

```
tsne_glmnet_coef_all <- tsne_glmnet_all %>% coef( s = lambda )
# tsne_glmnet_coef_all$y1[-1] %>%
# { (.)[abs((.)[,1])>0,1] } %>%
# { data_frame(Coefficient = names(.), value = round(.,2)) } %>%
   print()
\# tsne\_glmnet\_coef\_all$y2[-1] \%>\%
# { (.)[abs((.)[,1])>0,1] } %>%
# { data_frame(Coefficient = names(.), value = round(.,2)) } %>%
    print()
tsne_coef_df_all <-
  tsne_glmnet_coef_all$y1 %>%
  as.matrix() %>%
  as.data.frame() %>%
  as_tibble() %>%
  rownames_to_column() %>%
  setNames(c("Coefficient","Y1")) %>%
  full_join(
    tsne_glmnet_coef_all$y2 %>%
      as.matrix() %>%
      as.data.frame() %>%
      as_tibble() %>%
```

```
rownames_to_column() %>%
      setNames(c("Coefficient","Y2")),
    by = "Coefficient"
  ) %>%
  filter( abs(Y1) > 1.0E-9 | abs(Y2) > 1.0E-9 ) \%% slice(-1)
tsne_coef_df_all %% mutate(mag = sqrt(Y1^2+Y2^2)) %>% arrange(desc(mag)) %>% print(n = 30)
## # A tibble: 164 x 4
##
                                   Coefficient
                                                        Y1
                                                                    Y2
##
                                         <chr>>
                                                     <dbl>
                                                                 <dbl>
##
    1
                       BF_ScienceTechnologies
                                                4.27786035 -1.83442089
    2
                          BF_ForeignLanguages
##
                                                1.50917251 3.11063075
##
    3
         BF_SAT_gt800le1000:BF_MechanicRepair
                                                2.15702170
                                                            1.82800909
   4
##
                               BF_discBreadth
                                                2.59109874 0.95726708
##
    5
                    BF_AgricultureAgriculture
                                                2.71810937 -0.07382335
##
    6
                                BF_SAT_gt1400 -0.39459961
                                                           2.44873066
    7
##
                          BF_PersonalCulinary
                                                2.07235738 -1.12785793
##
    8
                              BF_fsend_5_2005 -0.74049350 2.11707889
##
    9
                          BF_VisualPerforming
                                                2.18231155 -0.05955655
## 10
                                    BF_veteran
                                                1.36254811 -1.60867889
## 11
                   BF_EngineeringTechnologies
                                                1.58880282 -1.37435382
## 12
                            BF_pell_ever_2005
                                                1.21985948 -1.68407873
## 13
                       BF_PhilosophyReligious
                                                0.73841205
                                                           1.90518852
## 14
                          BF_PhysicalSciences
                                                0.97916719
                                                            1.70908410
## 15
                         BF_TheologyReligious -1.93590613 0.03208227
## 16
                BF CommunicationsTechnologies
                                                1.68233696 0.18596031
## 17
                                   BF_CDR3est
                                                0.26320881 -1.67190922
## 18
                                BF AreaEthnic
                                                0.96254797
                                                            1.33198095
## 19
                            BF_MechanicRepair
                                                1.55889711
                                                            0.02948046
## 20
                                    BF_History
                                                0.89410980
                                                            1.20355083
## 21
                              BF_p_gt48Kle75K
                                                0.07718334
                                                            1.49090462
## 22
                            {\tt BF\_FamilyConsumer}
                                                1.36361712 -0.10300407
## 23
                           BF_SAT_gt800le1000 -0.20755623 -1.32293371
## 24
                           BF_EnglishLanguage
                                                1.15850950 0.59568459
## 25
                   BF_TransportationMaterials 0.92382710 -0.90084071
## 26 BF_PersonalCulinary:BF_ForeignLanguages -1.27268893 -0.06349356
## 27
                          BF_NaturalResources 0.88801773 0.89911025
## 28
                                  BF_not1stgen -0.79841373 0.93536976
## 29
                         BF_HealthProfessions 1.13516055 -0.41607078
## 30
                            BF_SocialSciences 0.76216239 0.91547352
## # ... with 134 more rows, and 1 more variables: mag <dbl>
# tsne_coef_df %>%
# {
    qqplot(., aes(x=Y1,y=Y2,label=Coefficient)) +
#
      geom_point() +
      geom_text( check_overlap = TRUE )
# } %>%
    print()
key_terms <- tsne_coef_df_all %>%
  mutate(mag= sqrt(Y1^2+Y2^2)) %>%
  filter(abs(mag)>quantile(abs(mag),0.9)) %>%
```

```
arrange(desc(mag)) %$% Coefficient %>% setdiff("(Intercept)")
college_names <- glmdata_all %$%</pre>
  College %>%
  { gsub('^[0-9_]+','',. ) } %>%
  { gsub('Northwestern University','NU',.) } %>%
  { gsub('University of Notre Dame','Notre Dame U.',.) } %>%
  { gsub('Cornell University','Cornell U.',.) } %>%
  { gsub('California', 'Cal',. ) } %>%
  { gsub('Mass.+Inst.+Tech.+','MIT',. ) } %>%
  { gsub('(Mass|Penn|Wash)[^]+*','\\1',.) } %>%
 { gsub('Polytechnic','Poly',. ) } %>% { gsub('Institute of Tech[^]+','IT',. ) } %>%
  { gsub('Tech.+Inst.+','Tech',. ) } %>%
  { gsub('State','St',. ) } %>%
  { gsub('University','U',. ) } %>%
  { gsub('(U of )|( U$)','',. ) } %>%
  { gsub('College', 'Col',. ) } %>%
  { gsub('New York','NY',.)} %>%
  { gsub('International','Intl',.) } %>%
  { gsub('North[^]+','N',.)} %>%
  { gsub('South[^]+','S',.)} %>%
  { gsub('West[^]+','W',.)} %>%
  { gsub('East[^]+','E',.)} %>%
  { gsub(' U-','-',.)} %>%
  { gsub('-Penn St ','',.)} %>%
 { gsub(' Col *$','',.)} %>%
  { gsub('-(Main)* Campus','',.)} %>%
  { gsub('^PennSt([^-]+)$','Penn St-\\1',.)} %>%
  { gsub(' and ','&',.)} %>%
  { gsub('Agricultural & Mechanical', 'A&M',.)}
st_abb <- state.abb %>% setNames( state.name )
for( st_nm in names(st_abb) ){
  college_names %<>% { gsub(st_nm,st_abb[st_nm],.) }
categories <- {</pre>
  mmat[,key_terms] %*%
    (tsne_coef_df_all %>% filter(Coefficient %in% key_terms) %$% Y2)
} %>%
  sapply(
    function(x,q)\{ length(q) - sum(x>q) + 1 \},
    q=quantile(.,c(0.1,0.25,0.75,0.9))
  ) %>%
  factor()
tsne_df_all <- tsne_all$Y %>%
  as_tibble() %>%
  setNames(c("Y1","Y2")) %>%
  mutate(
    College = college_names,
```

```
category = categories,
BF_Income_gt110K = glmdata_all %$% {10.0^BF_p_gt110K}
) %>%
dplyr::select( College, category, BF_Income_gt110K, everything() ) %>%
mutate_at(funs(1.7*scale(.)),.vars=vars(Y1,Y2))
```

Show Biplot for Structure Interpretaion

we can overlay the feature dimensions on the college scatterplot in the 2-D t-SNE coordinate space. This allows us to more easily interpret the structure we're seeing. However, some of the interaction terms, in particular, are tricky to interpret because they have a positive value for a college if both of the features in the product making up the interaction have the same sign. So it could be that the college has a disproportionately higher or lower number of students having the attributes of both of the corresponding features.

```
f_mult <- max(sqrt(tsne_df_all$Y1^2 + tsne_df_all$Y2^2))/max(sqrt(tsne_coef_df_all$Y1[-1]^2 + tsne_coef
y2 \min < -3.5
tsne_coef_df_all %>%
  mutate(
    mag = sqrt(Y1^2 + Y2^2),
    Y2 = pmax(y2_min, Y2*f_mult),
   Y1 = Y1*f_mult,
    Coefficient = gsub('\\([^)]+\\)|(_*2005)|_','',gsub('BF_','',Coefficient))
  ) %>%
  {
    ggplot(., aes(x = Y1, y = Y2)) +
      geom_point( color = 'red', alpha = 0.1 ) +
      geom_text(
        aes( label = Coefficient),
        color = 'red',
        alpha = 0.7,
        size = 3,
        check_overlap = TRUE
      ) +
      geom_segment(
        inherit.aes = FALSE,
        data = (.) %>% filter(mag>1),
        aes( x=0, y=0, xend=Y1, yend=Y2 ),
        color = 'red',
        alpha = 0.3.
        arrow = arrow(length = unit(0.03, "npc"))
      geom_text(
        inherit.aes = FALSE,
        data = tsne_df_all,
        aes( x=Y1, y=Y2, label=College ),
        mapping=,
        color = 'black',
        size=3,
        check_overlap = TRUE
      geom_point( data=tsne_df_all, aes(x=Y1,y=Y2, size = BF_Income_gt110K ), color='blue',alpha=0.1) +
      ggtitle( "t-SNE Biplot" , subtitle = "(blue = college, red = feature)") +
      theme( text = element_text( face = 'bold' ) ) #+
```

```
#scale_y_continuous(limits = c(y2_min,4))
#scale_y_continuous(limits = c(y2_min,4))
} %>%
print()
```

t-SNE Biplot

```
(blue = college, red = feature)
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```
select_colleges <- c(
   '^OH St', '^MI-Ann Arbor', '^Purdue$', '^NU$',
   'Harvard', 'Yale', 'Princeton','^Penn$','^Cornell U\\.$','^Brown$',
   '^Howard$','Tuskegee','Hampton','Morehouse','Grambling','Bethune-Cookman',
   'Stanford','Johns Hopkins','Duke','Vanderbilt','Rice','Wash.+St Louis',
   'Notre Dame U\\.','^Pomona$','Harvey Mudd','Swarthmore',
   'MIT','Cal *IT'
)
tsne_select <- tsne_df_all %>%
   slice( sapply( select_colleges, function(nm_regex) grep(nm_regex,(.)$College) ) ) %$%
   set_rownames(as.matrix(select(.,Y1,Y2)),College) %>%
   round(1)
```

Here are the t-SNE 2-D coordinates for some notable universities:

```
• Big 10
    - Ohio State: 3.2, 0.8
    - Michigan: 0.7, 2.8
    - Purdue: 3.6, -0.9
    - Northwestern: 0.1, 3.5
• Ivy League
     - Harvard: 0, 3.8
    - Yale: 0, 3.7
    - Princeton: -0.8, 4.2
    - Penn: 0.2, 3.6
    - Cornell: 0.2, 3.5
    - Brown: 0.1, 3.5
• HBCUs
    - Howard: 1.7, 1.4
    - Tuskegee: 2.6, 1.3
    - Hampton Institute: 0.6, -0.7
    - Morehouse: -2, 1.8
    - Grambling: 0.5, -2.8
    - Bethune-Cookman: 0.2, -2.9
• Others
    - Stanford: -0.1, 3.6
    - Johns Hopkins: 0.4, 3.2
    - Duke: -0.1, 3.6
    - Vanderbilt: -0.1, 3.6
    - Rice: -0.2, 3.7
    - Washington U.-St. Louis: 0.1, 3.6
    - Notre Dame: 0.3, 3.4
    - Pomona: -0.9, 4.5
    - Harvey Mudd: -0.8, 4.5
    - Swarthmore: -0.9, 4.5
    - MIT: 0.2, 3.7
    - CalTech: -0.8, 4.5
```

Perform Hierarchical Clustering

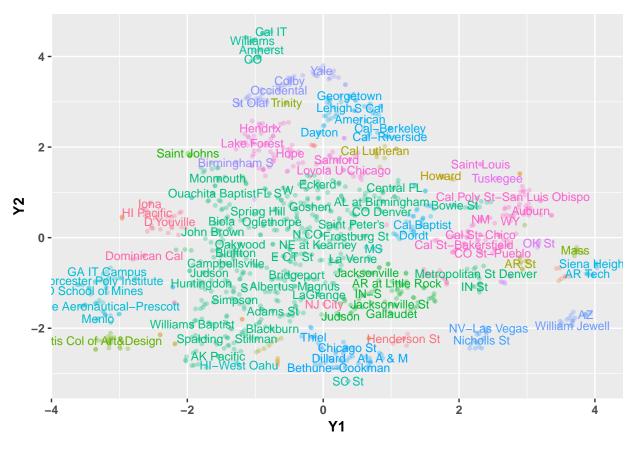
Now, I perform cluster analysis. Hierarchical clustering is a quick way to identify clusters in the 2-D t-SNE space. We can then color the clusterings in a scatterplot to more easily visualize the structure.

```
tsne_mat_hc_all <- tsne_df_all %>% select(Y1,Y2) %>% as.matrix() %>% set_rownames(tsne_df_all$College)
hc_all <- hclust( d = dist( tsne_mat_hc_all ), method = 'single' )
n_cluster <- 55
cluster_id_all <- cutree( hc_all, k = n_cluster )

# plot( tsne_mat_hc, pch=20, cex=0.5 )
# for(j in seq_along(cl)){
# points( tsne_mat_hc[ cl[[j]], ], pch=20, col=j, cex=1)
# }

# randomize so adjacent clusters are more likely to have very different colors.
set.seed(137)
cluster_id_all <- setNames( sample.int(n_cluster)[cluster_id_all], names(cluster_id_all) )</pre>
```

```
tsne_mat_hc_all %>%
  as_tibble() %>%
mutate( College = names(cluster_id_all), cluster = factor( cluster_id_all))  %>%
{
    ggplot(.,aes( x = Y1, y = Y2, color = cluster)) +
        geom_point( size = 1, alpha = 0.3) +
        geom_text( aes(label = College), size = 3, check_overlap = TRUE) +
        theme(
        text = element_text( face = 'bold'),
        legend.position = 'none'
    )
} %>%
print()
```



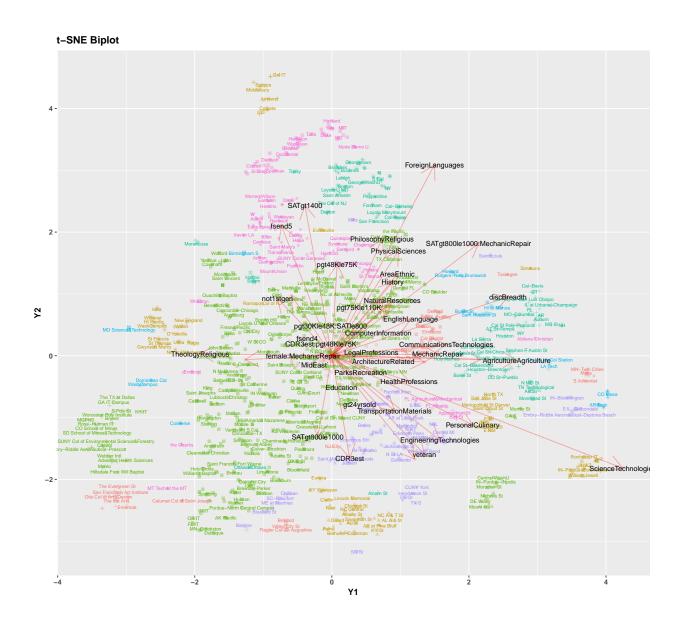
Show Biplot with Cluster Coloring

Finally, we can overlay the feature dimensions on the 2-D

```
cluster_id_all <- cutree( hc_all, k = n_cluster )
y2_min <- -4
y2_max <- 3.49
y1 <- range(tsne_mat_hc_all[,1])
y1[1] <- 0.5*floor(y1[1]/0.5)
y1[2] <- 0.5*ceiling(y1[2]/0.5)
y2 <- range(tsne_mat_hc_all[,2])</pre>
```

```
y2[1] <- 0.5*floor(y2[1]/0.5)
y2[2] < 0.5*ceiling(y2[2]/0.5)
is_out_of_bounds <- function(x,bounds){ x<bounds[1] | x>bounds[2] }
# Assumes that value violating bounds is of same sign as bound violated AND that bounds are of opposite
bound_factor <- function(x,bounds){</pre>
  f1 <- ifelse(x<bounds[1],x/bounds[1],0)</pre>
  f2 <- ifelse(x>bounds[2],x/bounds[2],0)
  mapply(function(b1,b2) if(b1>b2) c(1,b1) else c(2,b2),f1,f2)
tsne_modified <- tsne_coef_df_all %>%
  mutate(
    mag = sqrt(Y1^2 + Y2^2)
    \label{eq:coefficient} \begin{tabular}{ll} Coefficient = gsub('\\([^)]+\)|(_*2005)|_','',gsub('BF_','',Coefficient)), \\ \end{tabular}
    Y1 = f_mult*Y1,
    Y2 = f_mult*Y2
  )
# check bounds to find if any violated
bchk1 <- bound_factor(tsne_modified$Y1,y1)</pre>
bchk2 <- bound_factor(tsne_modified$Y2,y2)
# bound on Y1 violated
w1 \leftarrow which(bchk1[2,] != 0)
# bound on Y2 violated
w2 \leftarrow which(bchk2[2,] != 0)
# Keep only coord Y1 or Y2 violated the most by each violating pt.
for( i in intersect(w1,w2)) { if(bchk1[2,i]>bchk2[2,i]) w2<-setdiff(w2,i) else w1<- setdiff(w1,i) }</pre>
# bound on Y1 violated: fix it
for( i in w1 ){
  tsne_modified$Y2[i] <- tsne_modified$Y2[i]*y1[bchk1[1,i]]/tsne_modified$Y1[i]
  tsne_modified$Y1[i] <- y1[bchk1[1,i]]</pre>
# bound on Y2 violated: fix it
for( i in w2 ){
  tsne_modified$Y1[i] <- tsne_modified$Y1[i]*y2[bchk2[1,i]]/tsne_modified$Y2[i]
  tsne_modified$Y2[i] <- y2[bchk2[1,i]]</pre>
tsne_modified %>%
    ggplot(., aes(x = Y1, y = Y2)) +
      geom_point( color = 'red', alpha = 0.1 ) +
      geom_segment(
        inherit.aes = FALSE,
        data = (.) %>% filter(mag>1),
        aes( x=0, y=0, x=0=Y1, y=0=Y2),
        color = 'red',
        alpha = 0.3,
        arrow = arrow(length = unit(0.03, "npc"))
      ) +
      geom_text(
        inherit.aes = FALSE,
        data = tsne_mat_hc_all %>%
```

```
as_tibble() %>%
        mutate(
          College = names(cluster_id_all),
         cluster = factor( (cluster_id_all %% 7) + 1 )
        ),
      aes( x=Y1, y=Y2, label=College, color = cluster ),
     mapping=,
     show.legend = FALSE,
     size=2,
     check_overlap = TRUE
    geom_text(
     aes( label = Coefficient ),
     color = 'black',
     size = 3,
     check_overlap = TRUE
    geom_point(
      data = tsne_mat_hc_all %>%
        as_tibble() %>%
        mutate(
         College = names(cluster_id_all),
          cluster = factor( (cluster_id_all %% 7) + 1 ),
          cluster_shape = factor( (cluster_id_all %% 6) + 1 )
        ),
      aes(x=Y1,y=Y2, color = cluster, shape = cluster_shape ),
     show.legend = FALSE,
     alpha=0.3
    ggtitle( "t-SNE Biplot" ) +
    theme( text = element_text( face = 'bold' ) ) #+
    \#scale_y\_continuous(limits = c(y2\_min,5))
} %>%
print()
```



Conclusions

We do find some structure in the plot. And, the rotation of the axis to put Harvard University at the top-center helps us to interpret the axes and give meaning to that structure.

Notable clusters

Clusters are colored with repeating colors and marked with repeating symbols, reflecting a limit of **ggplot2**. But each cluster should have an unique color-symbol combination.

- Ivy Leagues (orange pluses @ {0,3})
- Big Publics (Land-Grants) (lavender asterisks @ {-2,1.5})
 - Cal-State System
- HCBU: haves & have-nots (gold triangles @ {-2.5,-2})
- **Techies** (Orange dots @ {3.3,-1.7})
- **Artsies** (Green dpts @ {2,-3.5})

- Religious (green boxed X's $@ \{2.5,0\}$)
- Back-to-Schools & Late-Bloomers (green pluses @ {-1,-1}) (>24yrs-old, veterans)

Interpretation of Quadrants

The combination of cluster locations and Bayes factors feature rays helps us assign meaning to each quadrant of the biplot.

Elite private & top-academic public, wealthy & smart

The vertical Y2 axis is now almost perfectly aligned with the ray pgt110K, which is the (\log_{10}) Bayes factor capturing the prevalance of students from families with annual incomes greater than \$110,000. All the Ivy League, "Ivy wannabes", and top-academic public universities (e.g., Cal-Berkeley, U. Michigan-Ann Arbor) are aligned along the positive vertical axis. That axis is almost perfectly countered by the downward-pointed ray SAT1e800, which is the Bayes factor capturing the prevalance of students with combined Verbal & Math SAT scores less than or equal to 800, i.e., the lowest tail of SAT scores.

Breadth versus specialization

The horizontal Y1 axis isn't so readily interpretable. However, we see the ray discBreadth, which is the feature capturing the entropy (variety) in academic disciplines in which degrees are offered from the college, is pointing into the upper-left corner of the plot. So colleges aligned along this ray in the upper-right quadrant are the big public state universities that offer a broad range of degrees. On the other hand, the narrowly, highly specialized colleges appear in the lower-right quadrant of the plot.

Pell grants & high 3-yr credit default rates

The colleges in the lower-left quadrant are the colleges most strongly aligned with rays pellever, which captures prevalence of students having ever received a federal Pell grant, and CDR3est, which captures prevalence of students defaulting on student loans within 3 years of leaving the college.

More privates, but less elite

The upper-right quadrant is aligned with SAT1400 (highest SAT students), fsend5 (applied to many colleges), and pgt48Kle75K (mid-income families).

Summary

This was an exploratory analysis investigating structure in the U.S. Dept. of Education College Scorecard dataset.