Happiness is Warm People, Financial and Student Data: The Chapman University Story

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#BBANALYTICS
Chapman University, Orange, California

- 9660 students: 7260 undergraduate; 2400 masters/PhD
- 11 Colleges including Business, Law, Pharmacy, Health Sciences, Film, and now, Engineering
- In 2019 obtained “High Research Activity” status (Carnegie R2)
- PeopleSoft implementation: Finance & HCM (2014) and Campus Solutions (2015)
Panther Analytics at Chapman University

• Purpose: Provide campus managers access to operational data as well as the data needed to support tactical and strategic decision making

• Technologies: Blackboard Analytics/Pyramid Reports

• Project Timeline
  – Nov 2015  Project initiation
  – July 2016  Vendor selection
  – Sept 16-Feb 17  System setup, training and storyboard development
  – Mar 2017  First storyboard rollout: “Dean’s Dashboard” (PA 1.0)
  – Oct 2017  New data sources/New Dashboards
  – Nov 2018  Panther Analytics includes Finance and HR Data
  – Mar 2019  Panther Analytics 2.0 – BB Upgrade to 6.5

#BBANALYTICS
PA Team and Technology

• Project Management & Guidance
  – Provost Office – Project Sponsor and Cheerleader
  – IS&T – Technology Owner, Project management, and system administration

• Report Developers
  – Institutional Research - 2
  – Admissions & Registrars - 2
  – Finance & Student Financials - 3
  – Human Resources and Payroll - 2
Panther Analytics 1.0: Strategy and Technology

• Initial Release targeted to University Deans and Chairs
• PeopleSoft Campus Solutions provided minimal reports
• We held focus groups to hear what information they wanted to see
• Our analytics team built one Storyboard with many (12) reports on separate tabs
• More data is better... or is it?
Dean’s Dashboard (PA 1.0) – Focus on Academic Data

Student-Program:
- Overall Enrollment
- Demographic Profile
- Enrollment by Plan
- Enrollment Trends
- Contact List
- Students Not Enrolled

Courses:
- Alerts
- Class Schedule
- Class Schedule Download
- Waitlist Analysis

#BBANALYTICS
Panther Analytics 2.0: Strategy and Technology

• Feedback was positive but audience was overwhelmed
  – Too much data – sensory overload
  – New way of retrieving data, new interface.
  – Lots of clicks and not always intuitive
• Analytics team researched what other Universities have done
• We took ideas from prior analytics conference ideas
• Simplify, simplify, simplify
• Added reports – Finance and HR end-user reports AND back office reports
Panther Analytics 2.0: Strategy and Technology
Panther Analytics 2.0: Strategy and Technology

Contact Us
Email us at panthersanalytics@chapman.edu

Data derived from the Panther Analytics reports are for internal use only and should NOT be reported to outside agencies. Panther Analytics reports are updated once a day and currently do not populate with official census data. Only census data should be used for external reporting. Census data can be found in the institutional.
Panther Analytics 2.0: Financial Reporting

• Objectives:
  – Primary source for reporting
  – Reduces the need for custom PeopleSoft reports
  – Really, this is version 1.0 for Finance

• Initial Rollout: November 2018
  – Budgets, Financial GL, Accounts Payable, Payroll, Leave Balances
  – Data validation still in process
  – Grants and Capital data not available yet
Panther Analytics 2.0: Financial Reporting

• Live March 2019
  – Combined database reporting: Payroll + FWS, Payroll + GL Journals, Student Financials (SSRS Reports)
  – Cost Center Attribute reporting
  – Budgetary Management and reporting for end users
    – Pre-encumbrances, encumbrances, expenses
    – Variance analysis
  – Addressed issues found during data validation
  – Duplicated some of the existing PeopleSoft reports

#BBANALYTICS
## Panther Analytics 2.0: Financial Reporting – Cost Center

### Budget & Actuals
- **Current Period**, **YTD**, **Annual**, **Prior Year**

### Summarized Accounts

<table>
<thead>
<tr>
<th>Account Hierarchy</th>
<th>Actual</th>
<th>Budget</th>
<th>Variance</th>
<th>YTD Actual</th>
<th>YTD Budget</th>
<th>YTD Variance</th>
<th>Annual Budget</th>
<th>YTD Actual FY</th>
<th>Annual Actual FY</th>
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</thead>
<tbody>
<tr>
<td>All Account Hierarchies</td>
<td>000025 Revenue</td>
<td>0</td>
<td>0</td>
<td>459,429</td>
<td>903,291</td>
<td>(503,862)</td>
<td>1,790,318</td>
<td>1,123,708</td>
<td>2,007,808</td>
</tr>
<tr>
<td>NON REVENUE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Tuition Revenue</td>
<td>0</td>
<td>0</td>
<td>459,429</td>
<td>903,291</td>
<td>(503,862)</td>
<td>1,790,318</td>
<td>1,123,708</td>
<td>2,007,808</td>
<td></td>
</tr>
<tr>
<td>4015 Auxiliary Enterprises</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000030 Expenses - Total</td>
<td>170,370</td>
<td>103,003</td>
<td>(13,367)</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>COMP EXPENSES Compensation Expense</td>
<td>5,066</td>
<td>12,611</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>5200 Admin and Staff Salaries</td>
<td>4,035</td>
<td>4,097</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>5030 Student Salaries</td>
<td>(154)</td>
<td>6,861</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>5060 Fringe Benefits</td>
<td>1,425</td>
<td>1,797</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>NON COMP EXPENSES Non-Compensation Expenses</td>
<td>171,064</td>
<td>157,410</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>5100 Professional Services</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5170 Supplies, Printing and Postage</td>
<td>714</td>
<td>2,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>5200 Travel and Services</td>
<td>379</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>5270 Telecom and IT Contracts/Software</td>
<td>695</td>
<td>107,887</td>
<td>10,899</td>
<td>573,154</td>
<td>114,581</td>
<td>438,654</td>
<td>856,330</td>
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<tr>
<td>5300 Maint. and Facility Rental</td>
<td>98,968</td>
<td>107,887</td>
<td>10,899</td>
<td>573,154</td>
<td>114,581</td>
<td>438,654</td>
<td>856,330</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5400 Taxes, Insur. and Bad Debt</td>
<td>43,568</td>
<td>8,443</td>
<td>(35,125)</td>
<td>45,008</td>
<td>10,782</td>
<td>(35,125)</td>
<td>21,690</td>
<td>10,508</td>
<td>116,457</td>
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<tr>
<td>5600 Equipment and Projects</td>
<td>4,500</td>
<td>4,500</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5850 Depreciation and Amortization</td>
<td>28,739</td>
<td>29,582</td>
<td>843</td>
<td>172,435</td>
<td>177,492</td>
<td>5,057</td>
<td>354,986</td>
<td>176,228</td>
<td>352,456</td>
</tr>
<tr>
<td>Not Totals</td>
<td>(175,370)</td>
<td>(163,003)</td>
<td>(13,367)</td>
<td>(410,077)</td>
<td>(35,848)</td>
<td>(374,429)</td>
<td>(224,099)</td>
<td>440,002</td>
<td>520,231</td>
</tr>
</tbody>
</table>
### Panther Analytics 2.0: Financial Reporting – Payroll + FWS

#### Payroll with FWS (Restricted Access)

<table>
<thead>
<tr>
<th>Student</th>
<th>Aid Year</th>
<th>Award Status</th>
<th>Offer Amount</th>
<th>Accepted Amount</th>
<th>Remaining Amount</th>
<th>Pay Check Number</th>
<th>Check Date</th>
<th>Check Amount</th>
<th>Dept</th>
</tr>
</thead>
<tbody>
<tr>
<td>1169867</td>
<td>2019</td>
<td>Accepted</td>
<td>3,000.00</td>
<td>3,000.00</td>
<td>1,389.00</td>
<td>815467</td>
<td>03/01/2019</td>
<td>150.00</td>
<td>1650</td>
</tr>
<tr>
<td>116148</td>
<td>2019</td>
<td>Accepted</td>
<td>3,000.00</td>
<td>285.00</td>
<td>285.00</td>
<td>816148</td>
<td>03/15/2019</td>
<td>285.00</td>
<td>1650</td>
</tr>
<tr>
<td>1169848</td>
<td>2019</td>
<td>Accepted</td>
<td>3,000.00</td>
<td>72.00</td>
<td>72.00</td>
<td>8169848</td>
<td>03/29/2019</td>
<td>72.00</td>
<td>1650</td>
</tr>
<tr>
<td>117525</td>
<td>2019</td>
<td>Accepted</td>
<td>3,000.00</td>
<td>288.00</td>
<td>288.00</td>
<td>817525</td>
<td>04/12/2019</td>
<td>288.00</td>
<td>1650</td>
</tr>
<tr>
<td>118254</td>
<td>2019</td>
<td>Accepted</td>
<td>3,000.00</td>
<td>300.00</td>
<td>300.00</td>
<td>818254</td>
<td>04/26/2019</td>
<td>300.00</td>
<td>1650</td>
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<tr>
<td>118861</td>
<td>2019</td>
<td>Accepted</td>
<td>3,000.00</td>
<td>378.00</td>
<td>378.00</td>
<td>818861</td>
<td>05/10/2019</td>
<td>378.00</td>
<td>1650</td>
</tr>
<tr>
<td>119529</td>
<td>2019</td>
<td>Accepted</td>
<td>3,000.00</td>
<td>138.00</td>
<td>138.00</td>
<td>819529</td>
<td>05/24/2019</td>
<td>138.00</td>
<td>1650</td>
</tr>
</tbody>
</table>

**Total:** 1,811.00

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*Student Award Information*

*Payroll Details*
Panther Analytics 2.0: People Data

• Unlock the power of data for better talent and business decisions
  – It’s a priority but where to begin?
  – Initial audiences
    • Supervisors of student employees
    • EVP/COO
  – Main challenges
    • Data extraction from two separate enterprise systems
    • Data did not exist in any enterprise system
Panther Analytics 2.0: People Data (Detail or High Level)

Student Supervisors
- Federal Work Study Award
- Graduate Assistantships

<table>
<thead>
<tr>
<th>Employee</th>
<th>Position by Number</th>
<th>Pay Group</th>
<th>Fiscal Year / Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Jul 2019</td>
</tr>
<tr>
<td>00001391 - (Stud Asst Goldroom)</td>
<td>Students - Summer (STS)</td>
<td>$12.00</td>
<td>$12.00</td>
</tr>
<tr>
<td>00003213 - (Stud Asst Stage)</td>
<td>Students - Academic Year (STA)</td>
<td>$12.00</td>
<td>$12.00</td>
</tr>
<tr>
<td>00001416 - (Stud Asst TV/Studio)</td>
<td>Students - Summer (STS)</td>
<td>$12.00</td>
<td>$12.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee</th>
<th>Position by Number</th>
<th>FWS Award Status</th>
<th>Jul 2019 FWS Annual Accepted Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>00001391 - (Stud Asst Goldroom)</td>
<td>Accepted (A)</td>
<td>$3,000.00</td>
<td></td>
</tr>
<tr>
<td>00002106 - (Stud Asst FWS)</td>
<td>Accepted (A)</td>
<td>$3,000.00</td>
<td></td>
</tr>
</tbody>
</table>

- Drill-through
- Time scenario
- w/budgeted FTEs
Panther Analytics 2.0: Campus Data

- Added Reporting in:
  - Admissions
  - Completions
  - Student Progress

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>Term</th>
<th>Credits Attempted Term Census</th>
<th>Credits Attempted Term</th>
<th>Credits Earned Term</th>
<th>GPA Term</th>
<th>XC CU Cumulative Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman</td>
<td>Fall 2016</td>
<td>14.0</td>
<td>14.0</td>
<td>14.0</td>
<td>3.35</td>
<td>14</td>
</tr>
<tr>
<td></td>
<td>Spring 2017</td>
<td>14.0</td>
<td>14.0</td>
<td>14.0</td>
<td>2.80</td>
<td>28</td>
</tr>
<tr>
<td>Sophomore</td>
<td>Fall 2017</td>
<td>14.0</td>
<td>14.0</td>
<td>14.0</td>
<td>1.88</td>
<td>42</td>
</tr>
<tr>
<td></td>
<td>Interterm 2016</td>
<td>3.0</td>
<td>3.0</td>
<td>3.0</td>
<td>3.70</td>
<td>45</td>
</tr>
<tr>
<td></td>
<td>Spring 2018</td>
<td>14.0</td>
<td>14.0</td>
<td>14.0</td>
<td>3.11</td>
<td>58</td>
</tr>
<tr>
<td>Junior</td>
<td>Fall 2018</td>
<td>16.0</td>
<td>16.0</td>
<td>16.0</td>
<td>3.44</td>
<td>75</td>
</tr>
<tr>
<td></td>
<td>Interterm 2019</td>
<td>3.0</td>
<td>3.0</td>
<td>3.0</td>
<td>4.00</td>
<td>78</td>
</tr>
<tr>
<td></td>
<td>Spring 2019</td>
<td>18.0</td>
<td>18.0</td>
<td>15.0</td>
<td>1.67</td>
<td>90</td>
</tr>
<tr>
<td>Senior</td>
<td>Fall 2019</td>
<td>16.0</td>
<td>16.0</td>
<td>0.0</td>
<td>0.00</td>
<td>90</td>
</tr>
</tbody>
</table>
Panther Analytics 3.0  Happy and Informed Panthers

- Financial Aid
- Slate
- Data Governance
  – Need for Steering Committee
  – Training on Panther Analytics as a university resource
  – FERPA compliance and enforcement
  – Security/Role decisions

#BBANALYTICS
Panther Analytics 3.0: Financial Reporting

• Procurement Analysis/Benchmarkeding
  – Definition Phase
  – Comparative Vendor spend by categories
  – Average PO Processing Cost

• Additional End User Reports
Panther Analytics 3.0: People Data

Goals: To Continue Building Digital Maturity Platform by:

– Providing more visibility into workforce data
  • Need to secure data by employee and fund types
– Improving position management to inform workforce planning
  • Need to map business processes
  • Have conversations on position management

Workforce Planning

Vacancy factors
Salary savings
Positions
Panther Analytics 3.0: Campus Community

• Current Need: Better understanding of data is used by academic personnel:
  – Which students are entering and leaving my major?
  – How many students will take MGMT 456 next term?
  – Which students will have trouble in their courses this upcoming semester?
  – Who has done an internship? Who has visited career services?

• It’s all about the process......
We look forward to your thoughts and questions....