



Institution Intelligence and Reporting Validation

Ohio University

September 8, 2009

Welcome

- Kick-off
- Rufus Initiative Update
 - IdM, MDM
 - Campus Solutions, CRM, DARS
 - SOA
 - Portal
- Importance and Alignment of Institutional Intelligence and Reporting



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Background

- Motivation and Support
- Benefits
- Critical Success Factors

Motivation and Support

- What is Motivating this Initiative?
 - Manual Processes and Shadow Systems
 - Outdated SIS System with Discontinued Support
 - Dissatisfaction with Current Data Environment
 - Spread Across Non-Integrated Systems
 - Multiple User Interfaces
 - Inconsistent Data
 - “The data you need when you need it”
- Who is Supporting this Initiative?
 - University leadership
 - President, Provost, CFO, CIO
 - University Community

Benefits

Create a Foundation for Analytic Capabilities

- New SIS Provides Robust Reporting Capabilities
- Reduce Effort Spent Seeking, Extracting and Merging Information
- Facilitates Self-Service, User-Friendly Access to Summary and Detail Data
- Provides Single Source for Information
- Access to Historical and Current Information for Trending
- Integrates Data from Multiple Disparate Source Systems

Critical Success Factors

- Secure Environment
- Institutional Sponsorship & Support
- Broad Based Participation
- Effective and Accessible Toolset
- Unified Data Source and User Interface
 - Common Data Definitions
 - Improved Data Integrity and Consistency
- Targeted Training
- Continuous Enhancement and Growth Mindset

Discovery Sessions

- Thank you everyone who participated in our discovery planning sessions!
- Invited individuals from 27 units
- 75 individuals attended out of 85 invited

Advancement
Center for International Studies
College of Arts and Sciences
College of Business
College of Communication
College of Education
College of Engineering
College of Fine Arts
College of Health & Human Services
College of Medicine
Finance & Admin
Graduate College
Information Technology
Institutional Equity

Institutional Research
Library
Provost's Office
Regional Higher Education
Research
Student Accounts (Bursar)
Student Affairs
Student Financial Aid
Student Records (Registrar)
University College
Vice Provost Enrollment Management
Voinovich School
WOUB

General Findings from Discovery

- Reporting Needs Vary Significantly
- Data Availability Varies Significantly
- Need for Pre-Summarized Aggregate Data
- Need for Unit-Level Detail Data
- Opportunities to Standardize and Consolidate Reporting Tools
- 8 Years of Historical Aggregate Data Needed for Most Functional Areas
- Data Analysis and Reporting Can Be Hindered by Business Process Issues

Key Process Areas that Could Inhibit Data Analysis

- Employee Categorization (Faculty and Graduate Students)
- Position Management and Budgetary Control
- Graduate Student Enrollment
- Job Posting → Applicant → Employee Hiring Process
- Financial Chart of Accounts
 - Control and Enforcement of Segment Value Standards
 - Validation and Control of Spending Authority
 - Hierarchies and Rollups
- Consistent Definition and Usage of Employee FTE
- Course Demand Planning Process



Student & Academic Data Examples

Admissions & Recruiting	Student Records	Student Financials	Financial Aid	Campus Community	Academic Activity
Applicant trending by demographic	Student FTE counts	Student Account Balances	Average Awards (offered, accepted)	Holds blocking registration	Academic Quality Indicators
Prospect counts	Enrollment counts	Fees	Disbursements	Communication counts by type	Tenure Track Faculty to Student Ratios
Yield	Completion counts	GL posted transaction counts/amounts	Family contribution	Pending checklist items	Weighted student credit hour production per tenure track faculty
Admission Rates	Average GPA	Receivable trends	Fee Waivers		Research productivity
High School Ranks	Time to graduate	Average daily receivable	Work Study		Course duplication
Test Scores	Returning student rate	Average Collection time			Section size
Transfer counts	Graduation rate				Time to graduation
Retention	Student/faculty ratio				Grade Distributions
	Faculty workload				Incoming Student Profile
	Weighted Student Credit Hours				Program Accreditation
					Honors Programs

Institutional Research Data Examples

Historical Trending	External Reporting	Vision Ohio
Compendium	State HEI (multi-faceted subsidy reporting requirements)	Enrollment Projections
University Fact Book	University System of Ohio	Student Retention
Officially certified University data	Federal aggregate (enrollment, degree, graduation, demographic)	Student Graduation
	External Institutional Surveys (MAC Salary, CUPA, ODJFS, ACT, Alcohol.edu, Goalquest)	Freshmen Profile
	IPEDS	Student Assessment Study
	AAUP	

HR and Financial Data Examples

HR	Payroll	Budget Planning	Procurement and Spend	Financial
Job Posting	Wage and Fringe Benefit Expense	Key planning drivers	Procurement Costs	Revenue drivers
Employee Recruitment & Hiring	Time and Effort	Budget Scenarios	Supplier Performance	Cost drivers
Affirmative Action (Diversity & Inclusiveness)		Control Total	Supplier Payables	Budget versus Actual
Applicant and Hiring Trends		Budget Variance	Employee Travel Expenses	Funds Available
Promotion and Transfer Trends		Position Management		Payables
Termination and Turnover Trends		Budget Control		Receivables
Compensation		Health Care Projections		Cash Flow
Position Headcount				Balance Sheet
				Income Statements

Providing Answers

- Do people we hire closely resemble our current, desired, regional and national populations?
- What is the yield of admitted students across programs?
- How much did we spend last year by supplier?
- What percentage of faculty members are tenured?
- What are expenditures-to-date versus annual budget?
- How is research funding distributed across academic units?
- What happens to revenue if enrollment increases by 5%?
- What is the average time to graduate by major?
- What are the potential revenues for a new degree program?
- What are our faculty and student retention rates?

Prioritization Approach

- Functional Need
 - How many people utilize this requirement?
 - How is it handled today?
 - How often is it utilized?
 - What is the method of distribution?

Prioritization Approach

- Organizational Readiness
 - Is the data captured today in a useful manner?
 - Are the institutional processes aligned for this data to be useful and understood?
 - Are there institution critical processes that are being derailed because this data is not available?

Prioritization Approach

- Technical complexity
 - How complicated is it to get the captured data in the reporting requirement format?
 - How many sources systems have to be integrated in order to achieve the end result?
 - Can the required data be pulled from the system of record or does it need transformation to occur and movement to a warehouse for better performance?

Proposed Scope For Rufus Initiative

- IR Reporting Plus Data Conversion to Support Historical Trending and Analysis
- Implement Pre-Packaged Enterprise Performance Management (EPM) for Campus Solutions
 - Analytical Reporting on Aggregate Student/Academic Information
- Create an Operational Data Store to Support Detail Student/Academic Reporting
- Expose Core HR & Financial Data Through the Same Central/Shared Toolset

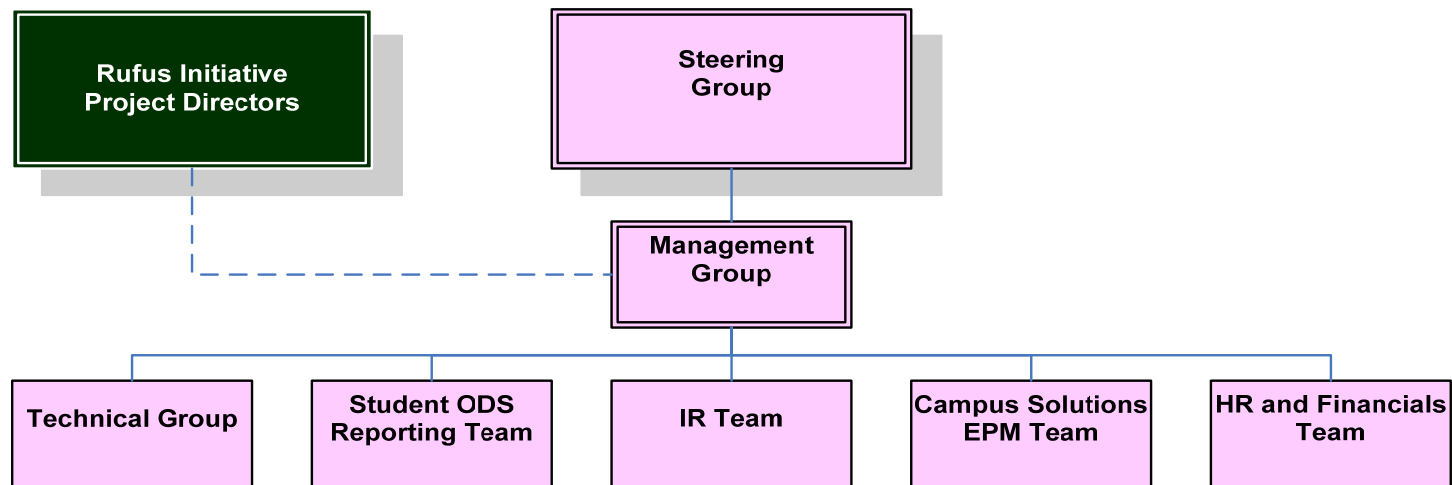
Proposed Tentative Timeline

- Begin IR Reporting Analysis & Design
 - October, 2009
- Begin Exposing Core HR & Financial Data
 - October, 2009
- Begin EPM Warehouse Design
 - January, 2010
- Begin Student/Academic ODS Design
 - January, 2010



Proposed Organization

Institutional Intelligence and Reporting



Staffing Roles and Responsibilities

- Steering Group
 - Executive Sponsorship
- Management Group
 - Rufus Management Team
 - Business Champion
 - Technical Lead
 - Project PM
- Functional Group
 - Functional Leads (50%)
 - Subject Matter Experts (As needed)
- Technical Group
 - Database Administrator (25%)
 - Data Architect (100%)
 - ETL Developer (100%)
 - Source System technical experts (25%+)
 - OBIEE Administrator (50%)
 - Answers/Report/Dashboard Developers (100%)

Critical Campus Partnership

- University Budget & Planning
- Institutional Research
- Student Enrollment Services
- Graduate Admissions
- Division of Finance
- University Human Resources
- Institutional Equity
- Budget Unit Managers
- Academic and Administrative Support Staff

Next Steps

- II Validation → II Roadmap
- OHIOize the II Roadmap
 - Procure Necessary Products (optional)
 - Create Technical Environment
 - Approve Scope/Phases
 - Build Project Plan
 - Execute Project Plan



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Feedback (All)

o Thank you!

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<http://www.ohio.edu/sisproject/index.cfm>