Business Intelligence Executive Dashboard – What would be useful to you?

Executive Leadership
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What is Business Intelligence?

• Refers to software and data bases designed to take advantage of large, complex, transactional business systems (like Peoplesoft)

• BI systems are ‘on top’ of the transactional systems (like the registration system, the admissions system, the human resources system)

• BI systems can take data from any source (inside and external to the transactional systems) and put them together and make them accessible to users
UITS (also known as Peoplesoft, Shrewsbury, ISIS, etc), following a review by a consulting firm,
  - began a reporting unit
  - to develop a business intelligence system (new purchase)
  - to improve reporting from the three Peoplesoft systems used at UMass

The first major task was to make the existing DB system (called the RDS) work properly – this has been (almost?) completed

The second is/was to develop user-friendly interfaces for various critical underserved areas – for example, principal investigators, advancement
Business Intelligence Cabinet and the Executive Dashboard

- In order to take the next step, the UITS Governance system created the BI Cabinet (chaired by Steve Lenhardt) with representatives from each campus
  - Donna Kuizenga, Richard Antonak & Jennifer Brown

- Next step = development of Executive Dashboard
  - To be available to campus and PO leadership on desk tops
  - To include key indicators leadership wishes to monitor/have available at all times (related to strategic goals?)
  - Will have ‘drill down’ capacity if more detail is sought
  - Will include data from all transactional systems
Executive Dashboard Proposed Metrics

- **FIN**
  - **Budget Performance**
    - Fiscal Year fund balance summary
    - Budget Balance summary
    - Sponsored Project summary
    - Non-sponsored Project summary
  - **General Finance**
    - Fiscal Year tuition remitted
    - Fiscal Year central fees
    - Fiscal Year CVIP gross revenue
    - Total Grants expended
- **HR**
  - Fiscal Year State and non-state payroll and fringes
    - Expenses over time
    - % Breakdown for current year

- **ACADEMIC**
  - **Applicant Trends**
  - **Cost of Attendance Analysis**
    - % Net COA by income quintile
    - Average grant by income quintile

- **RESEARCH**
  - **Awards by fiscal year**
    - Number of awards
    - Award amounts
  - **Top five award sponsors for each fiscal year**
What are we asking you?

• Are the proposed metrics useful?

• Defined as you wish them to be?

• Are there other metrics you want to see in an executive dashboard that would be of use to you in monitoring strategic goals, and/or in critical decision making?
Defining the metrics one needs to consider

- Timing - static by semester (OIRP snapshot), dynamic daily, weekly, monthly?

- History - compared to last week, last year, same time last semester, last five years?

- Organizational Level – vice chancellor level, department level?
How best to collect your feedback for April 21 BI Cabinet meeting?

- Send a spreadsheet with existing metrics and request comments, refinements and additions?

- OR

- Send an email requesting two ideas and comments on the proposed metrics?

- Deadline = April 17th to jennifer.brown@umb.edu