University of California, Berkeley

Operational Excellence

Enterprise Data Warehouse: Student Financial Statement

This proposal seeks to incorporate and integrate student financial data into the Enterprise Data Warehouse. In so doing, campus administrators would realize significantly improved analysis capabilities, leading to informed decision-making, while also gaining improved data accuracy, reliability and security.

Summary

The University's Institutional Data Management and Governance (IDMG) initiative has made significant progress in growing its EDW and Business Intelligence (BI) solutions over the past year. Its goal: to make institutional data easily accessible, reliable, consistent, and secure to support informed planning, decision-making, and communication. In building on its momentum, it is seeking funding to integrate student financial-related data.

The April 2011 release of student data in the EDW enabled significantly improved insights and analysis on the student experience. But several critical components remain; one being information about students' financial data. This shortcoming has led to numerous shadow systems to help analysts better evaluate fees, aids and awards and payments to students and groups. This proposal would add students' registration and housing fees, financial aid, work study, student awards, and accounts receivable and payable data into the EDW. New OBIEE Cal Answers reports and dashboards would help faculty and staff understand and evaluate the current state as well as trends relating to fees, aid, and student awarding systems.

This investment in the continued expansion of the EDW will help eliminate inefficient operations, poor decisions, inaccurate publication of data, lost opportunities, continued maintenance of redundant shadow systems, and increased risk of data loss and theft.

Delivering the Vision

Adding student financial data into the EDW will help achieve the vision of Operational Excellence by reducing administrative costs, advancing an effective and efficient operating environment, and instilling a culture of continuous improvement that leads to high-quality performance and outcomes. This proposal seeks one-time OE funding of $1,454,000 and will result in annual savings of $1,169,100.

Timeline

If approved by the Executive Committee, this effort would be rolled out in 15 months from funding approval.

Leadership

Sponsor: Erin Gore, Associate Vice Chancellor, Budget & Resource Planning, IDC Chair

Sponsor: Harry LeGrande, Vice Chancellor, Student Affairs

Sponsor: Cathy Koshland, Vice Provost of Academic Planning and Facilities

Initiative Manager: Pamela Brown / Karen Kato

For More Information

Complete copies of the Enterprise Data Warehouse Business Case as well as the Request for Resources and the proposed budget for Student Financial Statement can be viewed online at the OE web site at http://oe.berkeley.edu

Questions and comments about this proposal for the initiative team: kkato@berkeley.edu

Questions about Operational Excellence: oe@berkeley.edu