



UNC BOARD OF GOVERNORS DATA DASHBOARD

Board Work Session

July 26, 2018



DASHBOARD OVERVIEW

Board of Governors Data Dashboard – Purpose

- The primary purpose of the dashboard is to provide a high-level overview of selected student and financial measures:
 - Three years of selected student and financial data for each institution
 - Two years of facilities data
 - One year of employee turnover data for each institution
 - Provides additional detail in cursor over feature

Board of Governors Data Dashboard – Overview

Contents:

- Admissions
- Enrollments
- Graduation and Retention
- Financials
- Foundations and Endowments
- Facilities
- Employee Turnover

Board of Governors Data Dashboard – Overview

Things to Note:

- Dashboard does not yet contain any benchmarking or contextual information.
- Student data have already been validated and are being pulled from the Student Data Mart; financial data was collected for the first time from institutions.
- Data modernization will automate and standardize financial information.
- Longer data history could improve trend information.
- Not intended to provide a comprehensive look at each institution.

Navigating the Dashboard

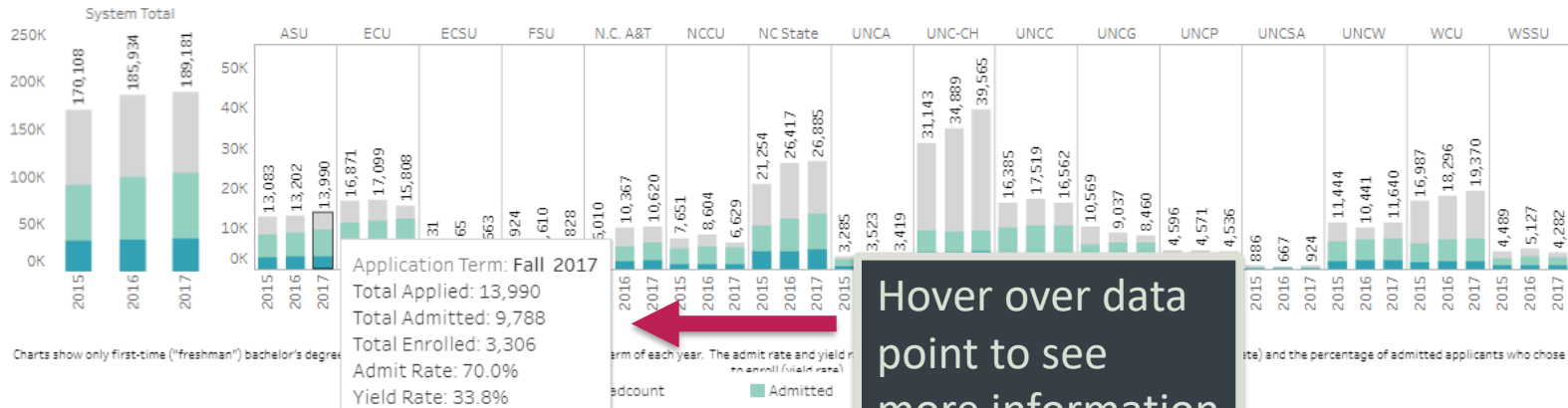
Admissions
Enrollments
Graduation and Retention
Financials
Foundations and Endowments
Facilities
Employee Turnover

Select tab to view

Carnegie Class
(All)

THE UNIVERSITY OF NORTH CAROLINA SYSTEM

Fall Applied, Admitted, Enrolled Counts for New Freshmen



High School Weighted Grade Point Average (GPA)

(combined averages for the selected institutions)

	Fall 2015	Fall 2016	Fall 2017
Enrolled Avg GPA	3.92	3.90	4.00
Admitted Avg GPA	3.96	3.90	3.99
Applied Avg GPA	3.75	3.67	3.78

Admissions Tests: ACT

(combined averages for the selected institutions)

	Fall 2015	Fall 2016	Fall 2017
Enrolled Avg ACT	24	24	24
Admitted Avg ACT	25	25	25
Applied Avg ACT	24	24	24

(combined averages for the selected institutions)

	Fall 2015	Fall 2016	Fall 2017
Enrolled Avg SAT (old)	1094	1091	
Admitted Avg SAT (old)	1116	1109	
Applied Avg SAT (old)	1078	1079	
Enrolled Avg SAT			1170
Admitted Avg SAT			1184
Applied Avg SAT			1167

Weighted GPA was standardized starting in 2015-16; this may slightly lower the average. The College Board changed the SAT test in March 2016. The scales of the two tests are the same, but the distribution of scores is different, increasing the average.



DASHBOARD DETAIL

Student Data

Student Data – Overview

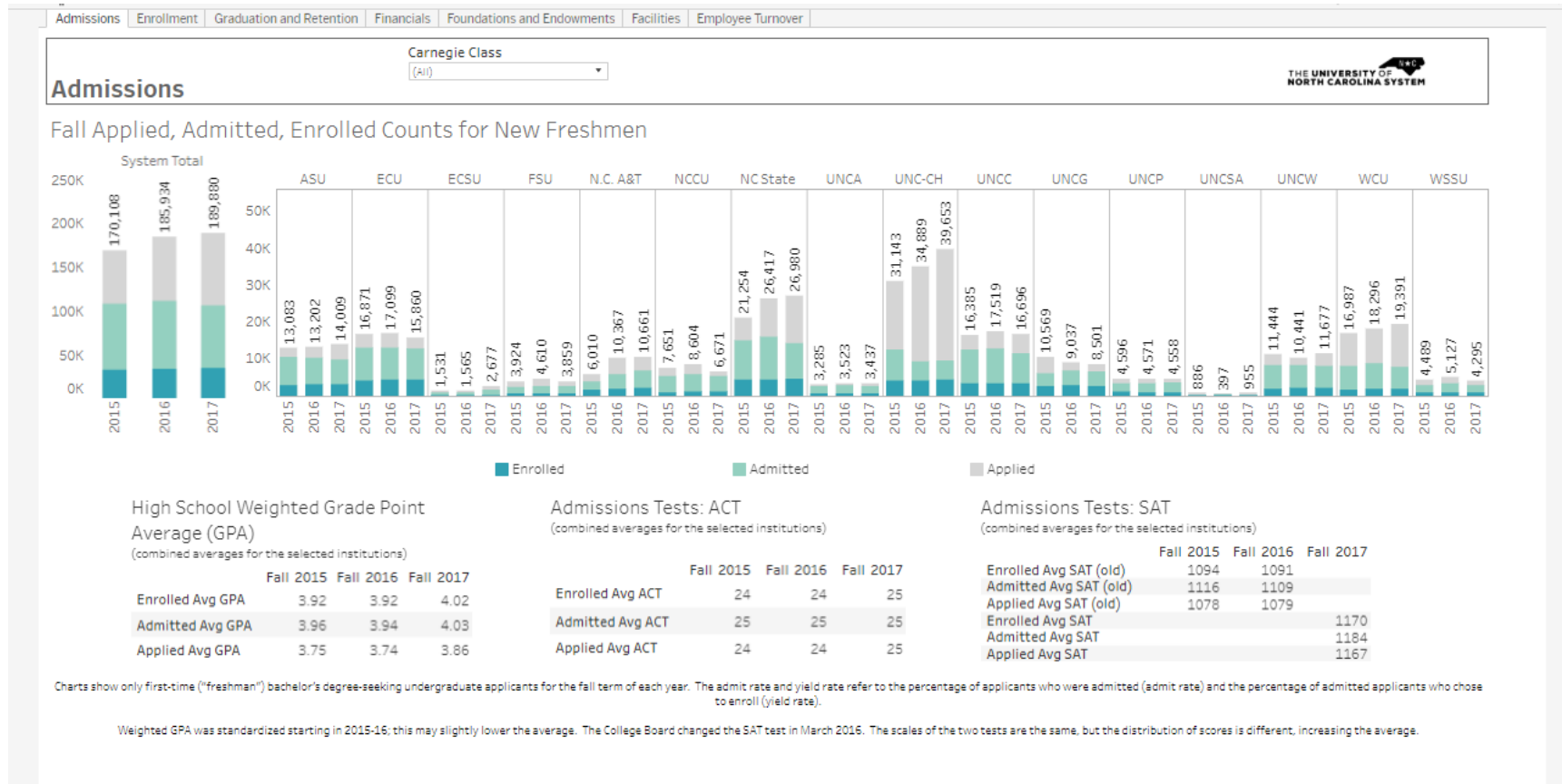
- Source of student data:
 - Student Data Mart – shared UNC System data warehouse
 - Insight – shared UNC System analytics platform
- Student data presented on these dashboards:
 - Admissions
 - Enrollment
 - Graduation and Retention

Admissions – Overview of Information

Tab Contents:

- 3 years of applicants, admits, and students enrolled
- 3 years of average high school Weighted GPA, ACT, and SAT
- Cursor over “pop-up” contains percentage of applicants who were admitted (admit rate) and percentage of admitted applicants who chose to enroll (yield rate)

Admissions Data



Source: Student Data Mart

Admissions – Additional Information

Things to Note:

- Includes information about first-time (freshmen) bachelor's degree-seeking undergraduate applicants for the fall term of each year. Does not include transfers and graduate students.
- Weighted GPAs were standardized for NC public schools in 2015-16.
- The SAT scoring changed in March of 2016.
- New UNC System data system went live in spring 2016.

Enrollment – Overview of Information

Tab Contents:

- 3 years of student enrollment for undergraduate and graduate students
- Filter to select headcount or full-time equivalent (FTE)



Enrollment – Additional Information

Things to Note:

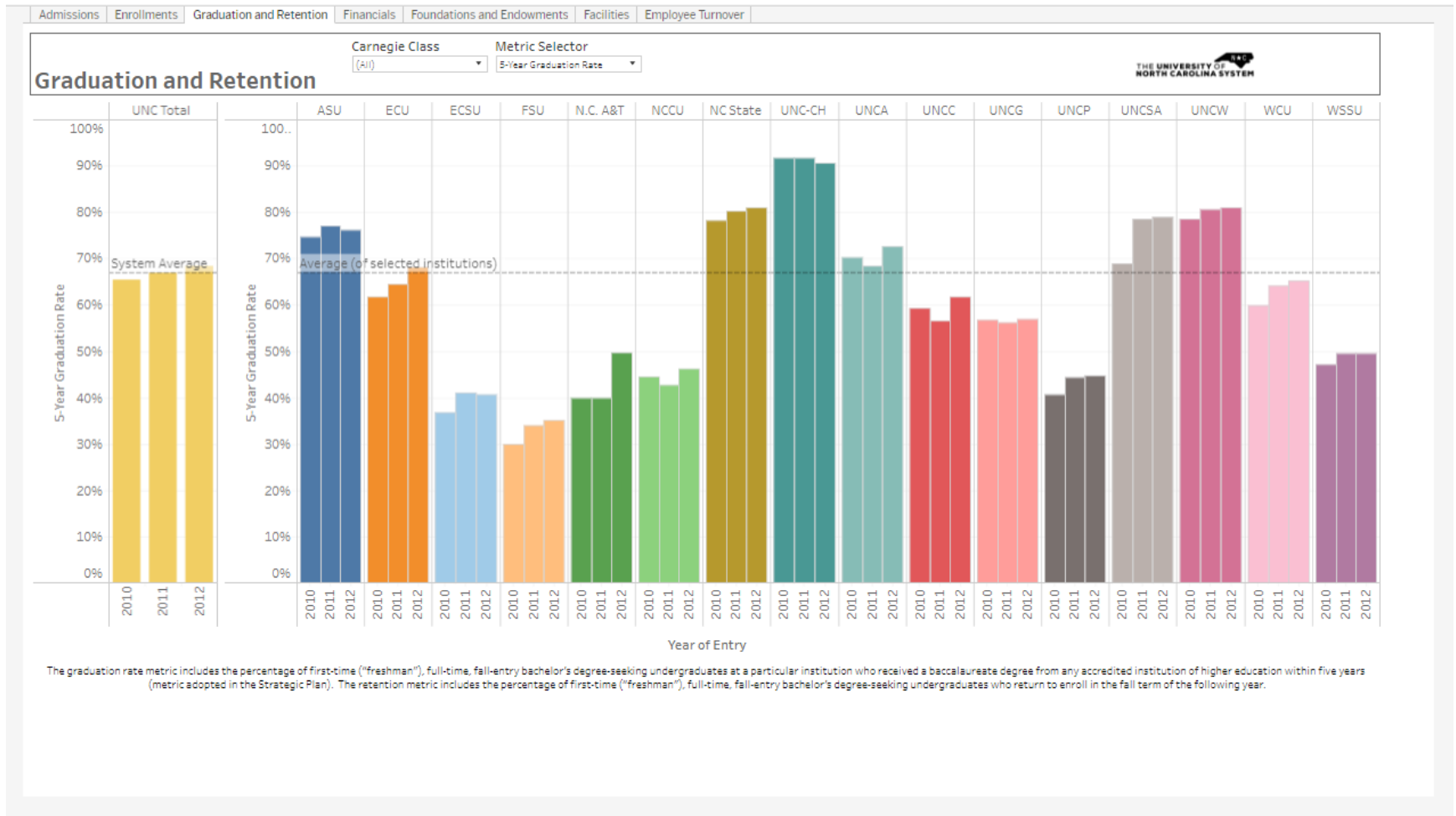
- Shows student enrollment as of fall census date.
- High school students are excluded.

Graduation and Retention – Overview of Information

Tab Contents:

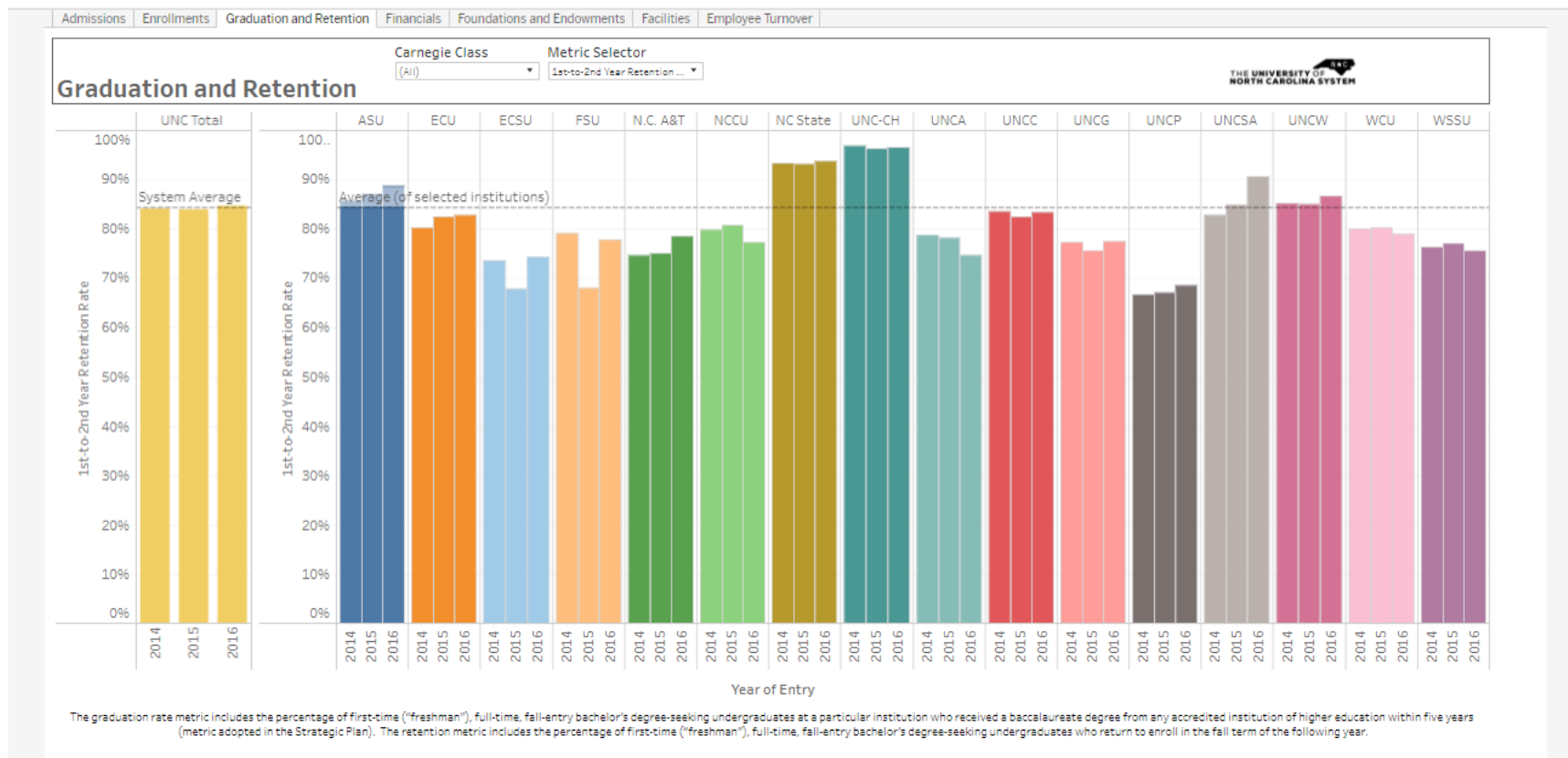
- 3 years of 5-year graduation rates and 1st-to-2nd year retention rates
- Group average that changes based on the selected Carnegie group

5-Year Graduation Data



Source: Student Data Mart

1st-to-2nd Year Retention Data



Source: Student Data Mart

Graduation and Retention – Additional Information

Things to Note:

- Includes first-time (freshmen), full-time, fall-entry bachelor's degree-seeking undergraduates.
- The graduation rate is the percentage who received a baccalaureate degree from any accredited institution within five years (metric adopted in the strategic plan).
- The retention metric is percentage who return to the same institution in the fall term of the following year.



DASHBOARD DETAIL

Financial Data

Financial Data – Overview

■ Source of financial data:

- Institutions provided athletics, dining, facilities and administrative, housing, parking, student health, foundations and endowment data
- Information was provided based on guidance from the UNC System Office

■ Source of facilities data:

- State Construction Office
- NC Higher Education Facilities Inventory

Financial Data – Overview

- Financial data presented on these dashboards:
 - 3 years of revenue and expenditure by institution
 - 3 years of year-end balance by institution
 - Additional detail in cursor over feature
- Fund balances:
 - A negative fund balance does not mean that the institution has outstanding obligations.
 - Positive fund balances:
 - ◆ Support bond rating
 - ◆ Provide contingency funds
 - ◆ Pay for debt service payments
 - ◆ Cover repair and renovations
 - ◆ Fund upcoming capital projects

Athletic Financials – Overview of Information

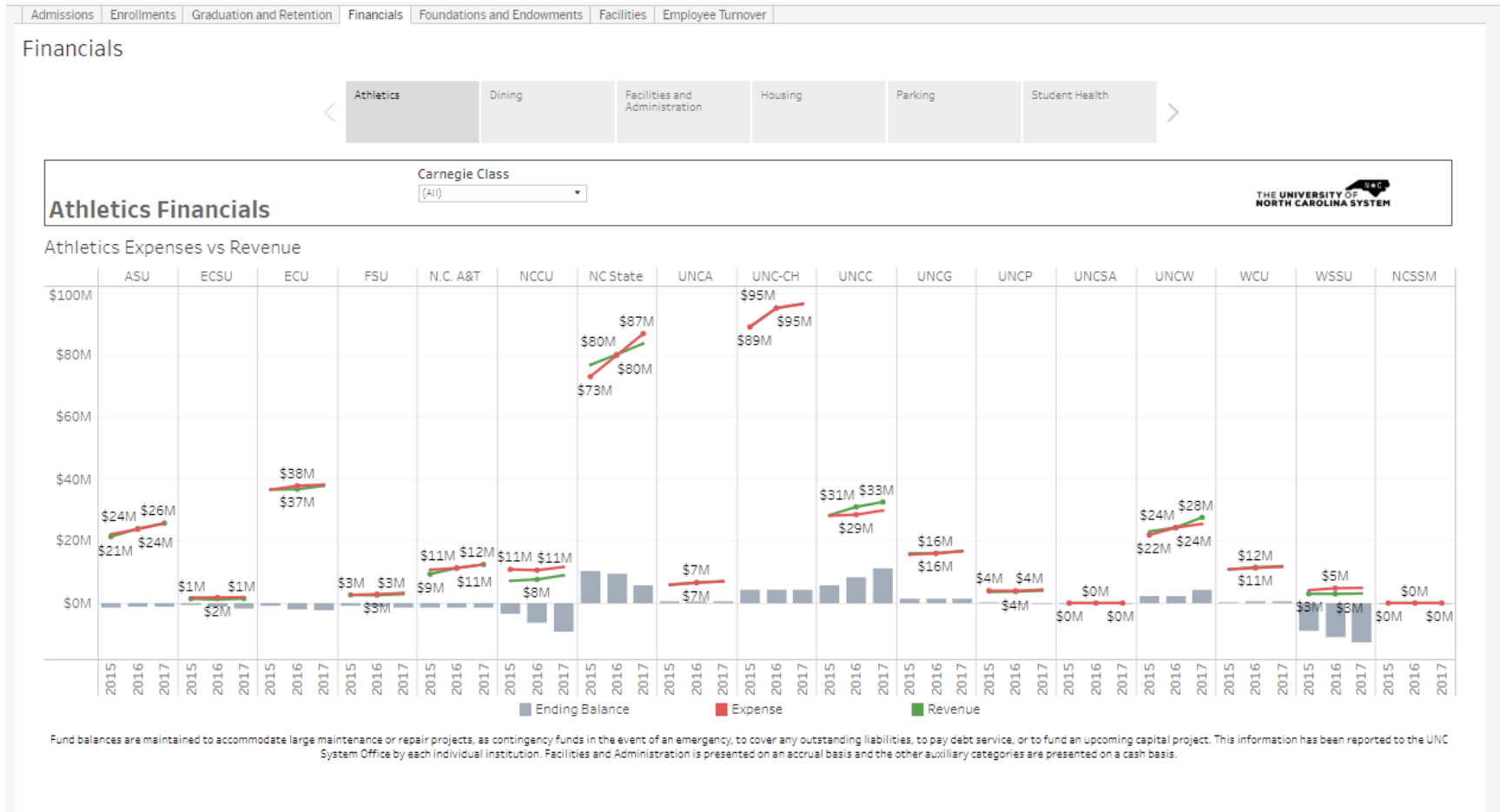
Financial Information:

- Athletic finances are part of an institution's trust funds.
- Athletics are in part supported by a student fee.
- Data is shown on a cash basis.

Tab Contents:

- 3 years of revenue and expenses by institution.
- 3 years of year-end fund balance by institution.
- Additional detail in hover over that provides revenue breakout.

Athletic Financials Data



Source: Collected from Institutions

Athletic Financials Data – R1 Detail



Source: Collected from Institutions

Athletic Financials – Additional Information

Things to Note:

- Athletic programs are expensive and typically run on fairly thin margins.
- A negative fund balance does not mean that the institution has outstanding obligations, only that the athletic program is not self supporting. This is not an uncommon practice across the country.
- The athletic conference and the types of varsity sports offered has a direct impact on both the revenue and expenses of the athletic program.

Dining Financials – Overview of Information

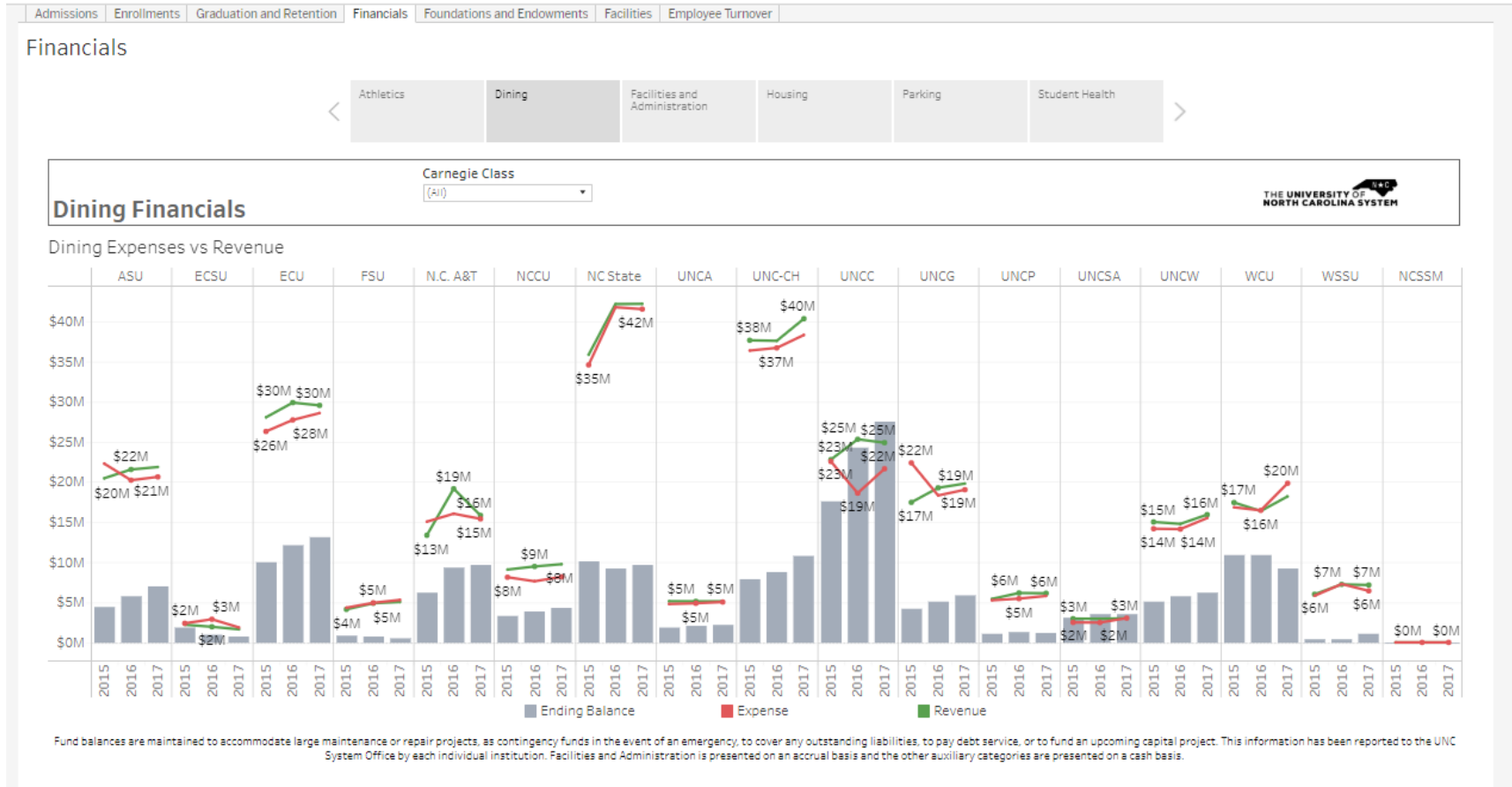
Financial Information:

- Dining finances are part of an institution's trust funds.
- Primary source of dining revenue is student meal plans.
- Data is shown on a cash basis.

Tab Contents:

- 3 years of revenue and expenses by institution.
- 3 years of year-end fund balance by institution.

Dining Financials Data



Source: Collected from Institutions

Dining Financials Data – M1 Detail



Source: Collected from Institutions

Dining Financials – Additional Information

Things to Note:

- Fund balances for dining services are used to pay debt service on dining facilities, repair and renovations on dining facilities, upcoming capital projects related to dining, as well as other obligations.
- Dining programs at all of the UNC institutions are self supporting.
- Dining facilities, services, and offerings vary widely by institution.

Facilities and Administrative Funds – Overview of Information

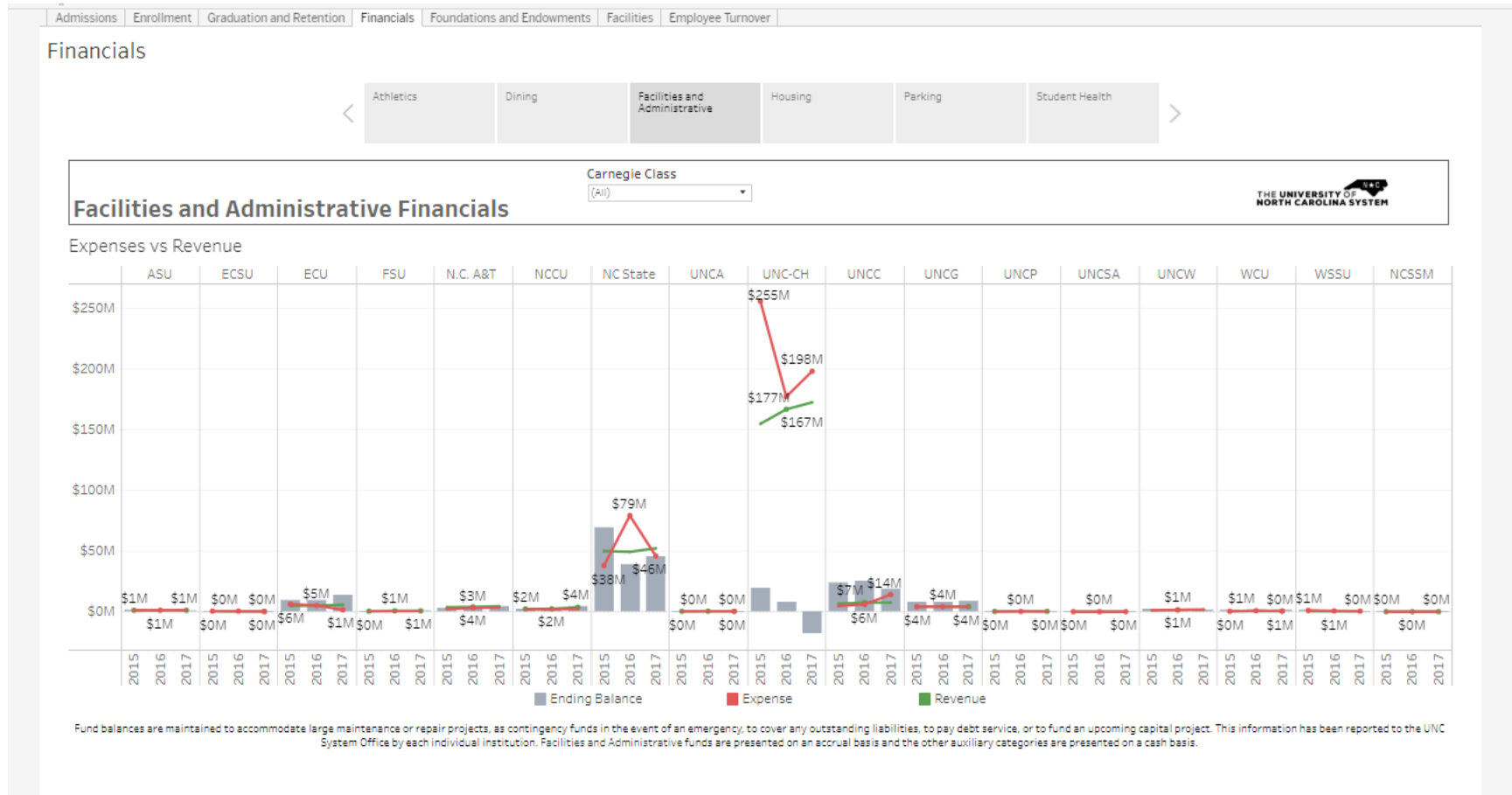
Financial Information:

- Facilities and Administrative Funds (F&A) are used to reimburse the university for the infrastructure support costs associated with sponsored research.
- F&A is part of an institution's trust funds.
- Data is shown on an accrual basis.

Tab Contents:

- 3 years of revenue and expenses by institution.
- 3 years of year-end fund balance by institution.

Facilities and Administrative Funds Data



Source: Collected from Institutions

Facilities and Administrative Funds Data – R1 Detail



Source: Collected from Institutions

Facilities and Administrative Funds – Additional Information

Things to Note:

- Fund balances are used to pay for debt service, repair and renovations, upcoming capital projects, as well as other obligations.
- F&A receipts is dependent on the amount of sponsored research at the institution. For FY 2016-17, about three-quarters of the research and sponsored program awards come from federal sources.
- F&A receipts are expended to support costs associated with maintaining an environment conducive to conducting research and scholarly advancement and ensuring competitiveness for attracting additional research.

Housing Financials – Overview of Information

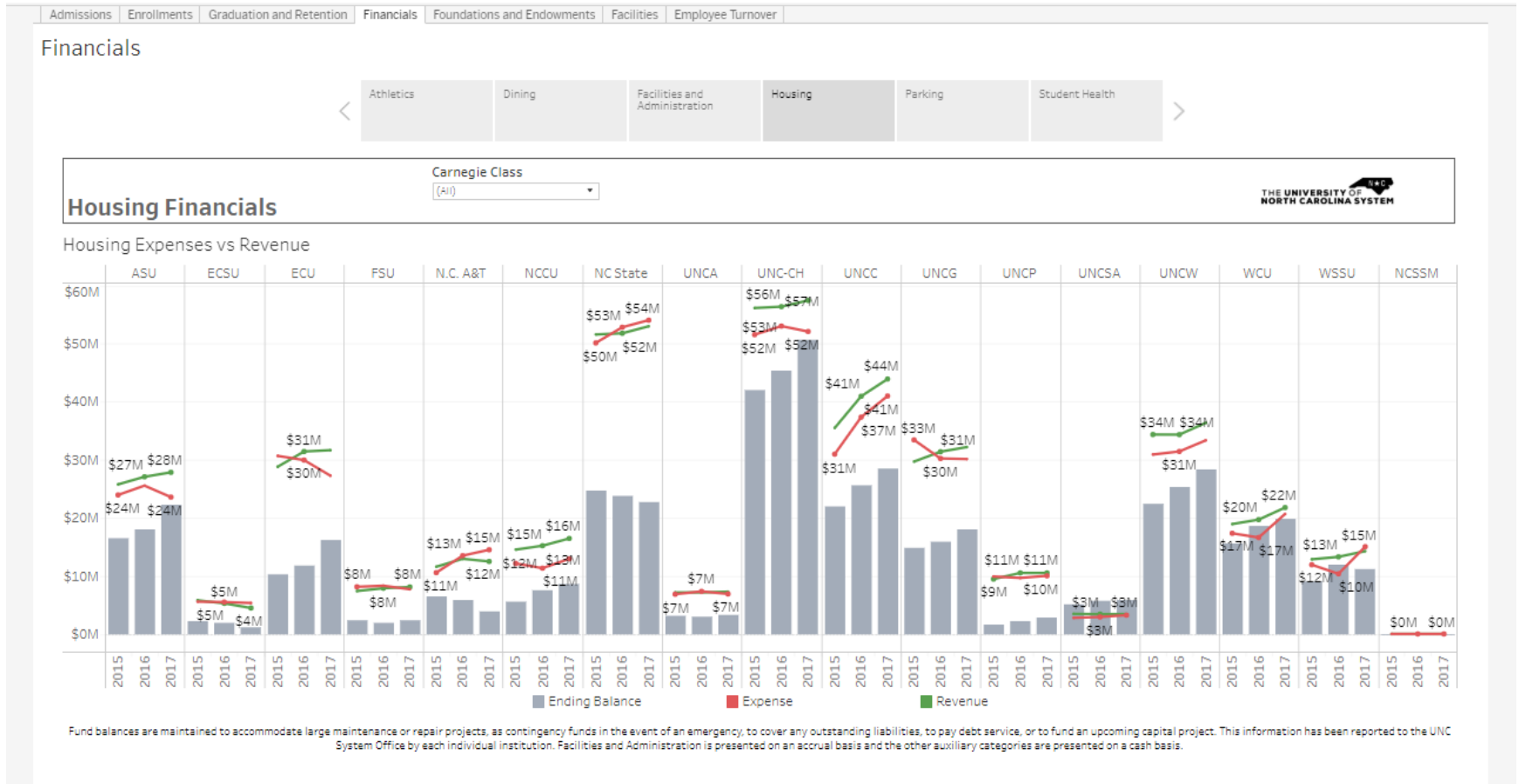
Financial Information:

- Housing finances are part of an institution's trust funds.
- Primary source of housing revenue is student rent.
- Data is shown on a cash basis.

Tab Contents:

- 3 years of revenue and expenses by institution.
- 3 years of year-end fund balance by institution.

Housing Financials Data



Source: Collected from Institutions

Housing Financials – R2 Detail



Source: Collected from Institutions

Housing Financials – Additional Information

Things to Note:

- Fund balances for housing are used to pay debt service on housing facilities, repair and renovations on housing facilities, upcoming capital projects related to student housing, contingency funds for emergencies, as well as other obligations.
- Housing programs at all UNC institutions are self supporting.
- Housing facilities, services, and offerings vary widely by institution.

Parking Financials – Overview of Information

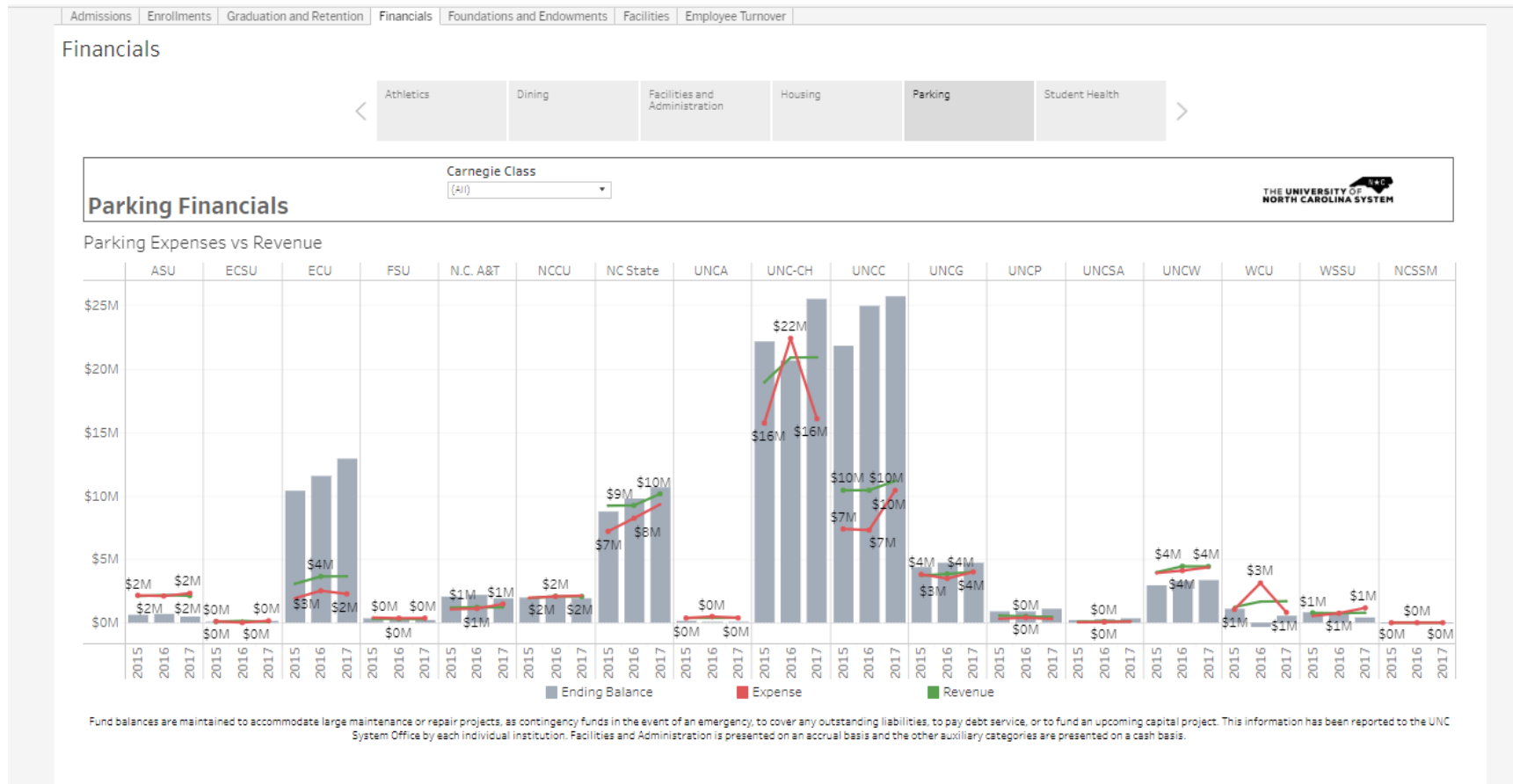
Financial Information:

- Parking finances are part of an institution's trust funds.
- Primary source of parking revenue is student faculty and staff parking permits, fees, and fines.
- Data does not include transportation (bus service).
- Data is shown on a cash basis.

Tab Contents:

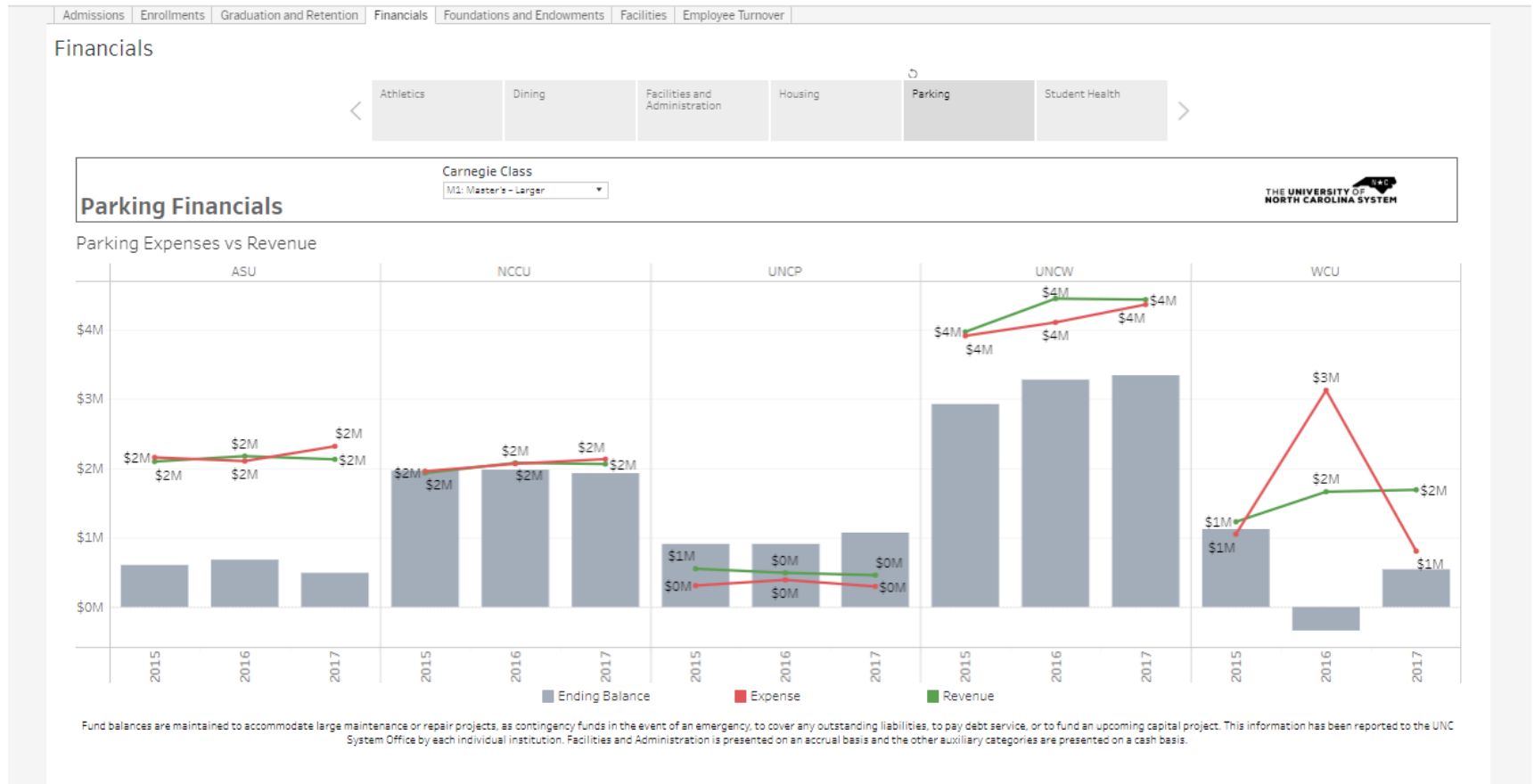
- 3 years of revenue and expenses by institution.
- 3 years of year-end fund balance by institution.

Parking Financials Data



Source: Collected from Institutions

Parking Financials – M1 Detail



Source: Collected from Institutions

Parking Financials – Additional Information

Things to Note:

- Fund balances for parking are used to pay for repair and renovations, upcoming capital projects related to parking lots and parking decks, as well as other obligations.
- 80 percent of parking fines are required to be remitted to DPI (G.S. 115C-457.2). The remaining funds are often not sufficient to cover the cost of issuing the citations.
- Demand for parking varies widely by institution.

Student Health Financials – Overview of Information

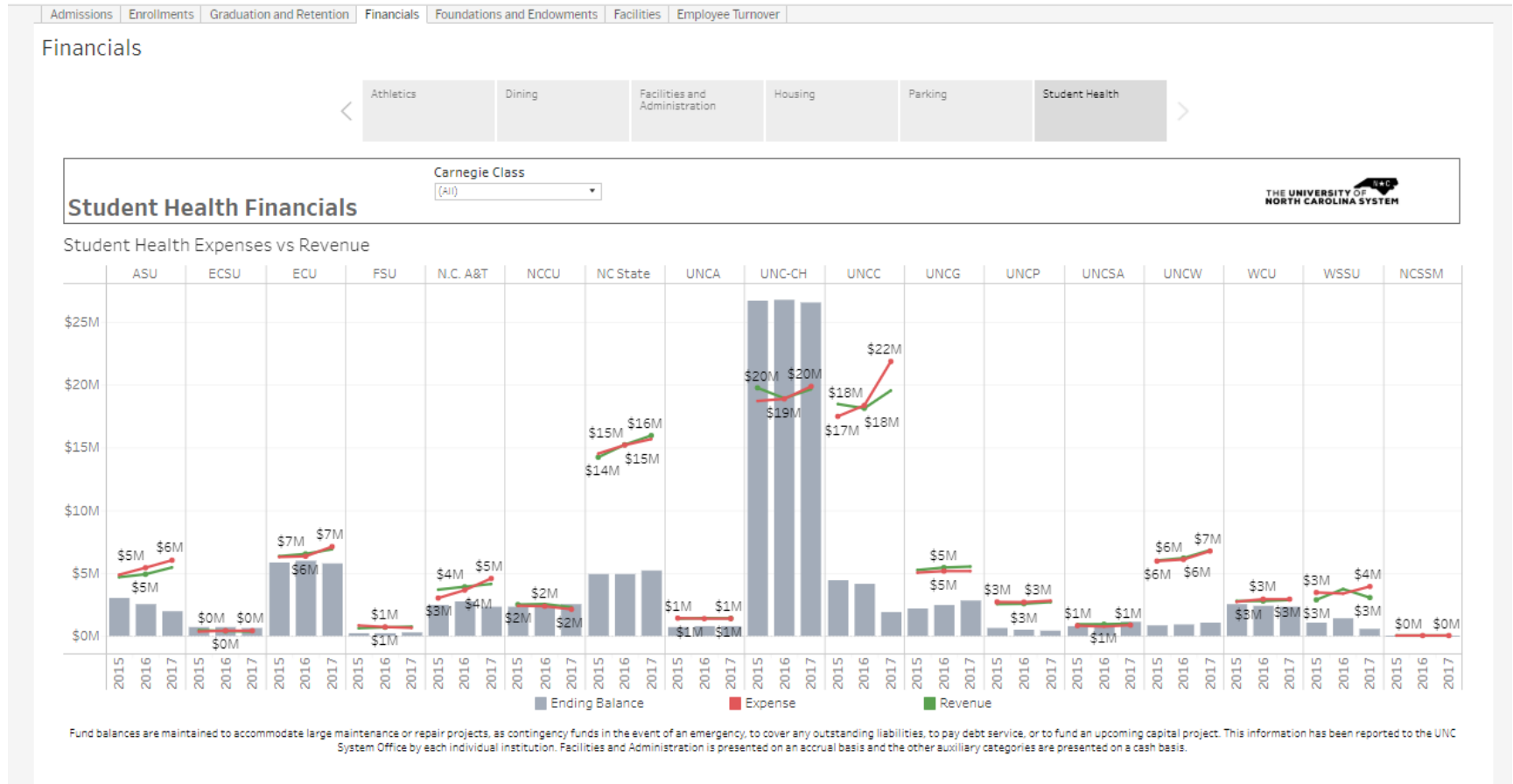
Financial Information:

- Student health finances are part of an institution's trust funds.
- Student health services are in part supported by a student fee.
- Data is shown on a cash basis.

Tab Contents:

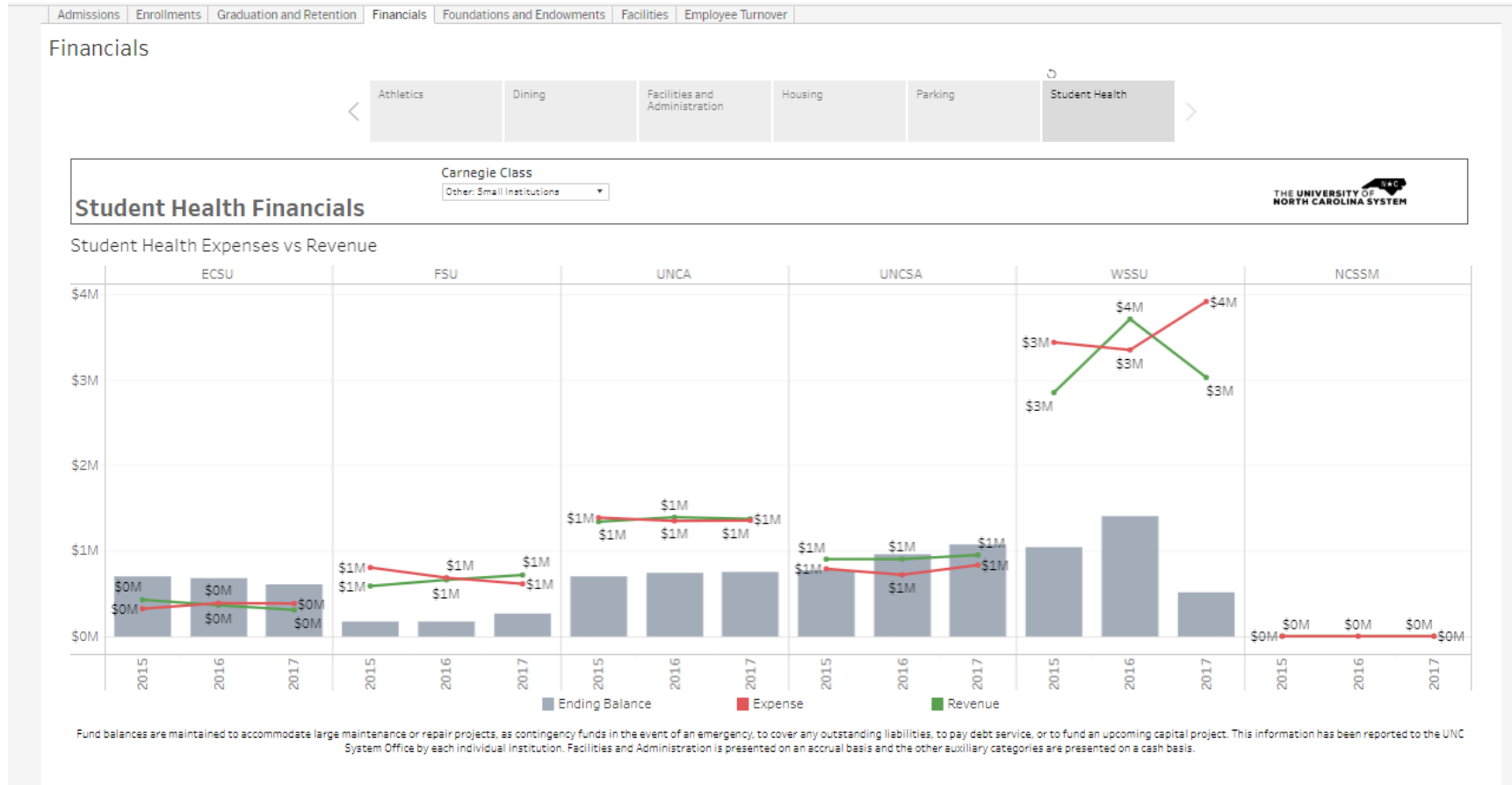
- 3 years of revenue and expenses by institution.
- 3 years of year-end fund balance by institution.

Student Health Financials Data



Source: Collected from Institutions

Student Health Financials – Small Institutions Detail



Source: Collected from Institutions

Student Health Financials – Additional Information

Things to Note:

- Fund balances for student health services are used to pay debt service on student health facilities, repair and renovations on student health facilities, contingency funds for emergencies, as well as other obligations.
- Student health programs at all UNC institutions are self supporting.
- Student health facilities, services, and offerings vary widely by institution.

Foundations – Overview of Information

Financial Information:

- Foundations are private 501(c)(3) corporations and are not legally part of universities.
- Not all associated entities are foundations.
- Foundations fall into three categories: blended (GASB), discretely presented (FASB), and related parties. Related parties have separate audited financial statements.
- Foundation revenue is primarily investment income and gifts.

Tab Contents:

- 3 years of revenue and expenses by institution.
- 3 years of year-end net assets/net position with breakout by restricted/unrestricted.
- 3 years of year-end cash and cash equivalents.

Endowments – Overview of Information

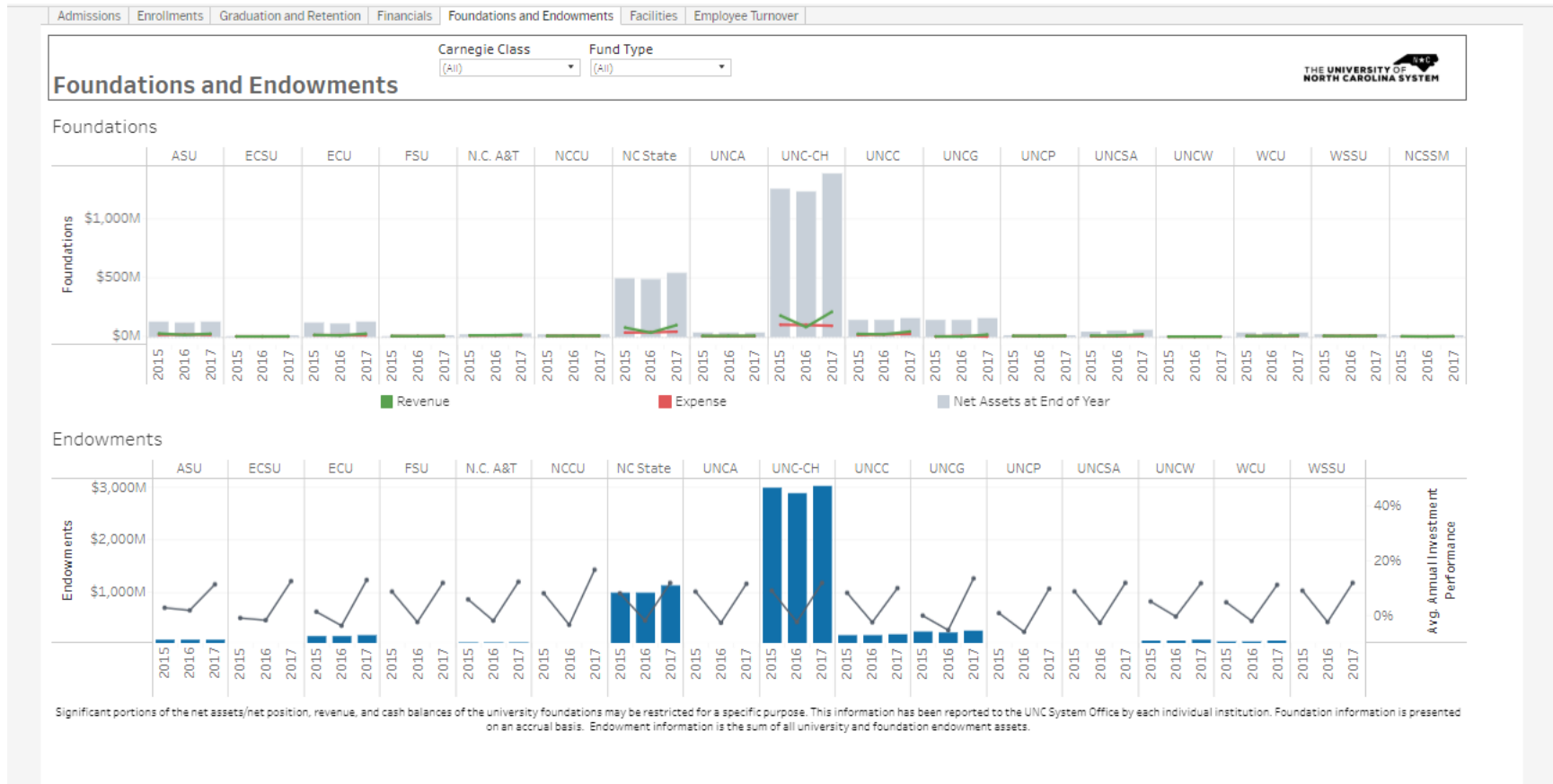
Financial Information:

- Endowments represent money or other financial assets that are donated to the institution or an associated entity that are meant to be invested.
- Endowments can be part of the university trust funds (statutory endowments) or part of a foundation or other associated entity.
- Most of our institutions have endowment investments that are managed by the UNC Management Company.

Tab Contents:

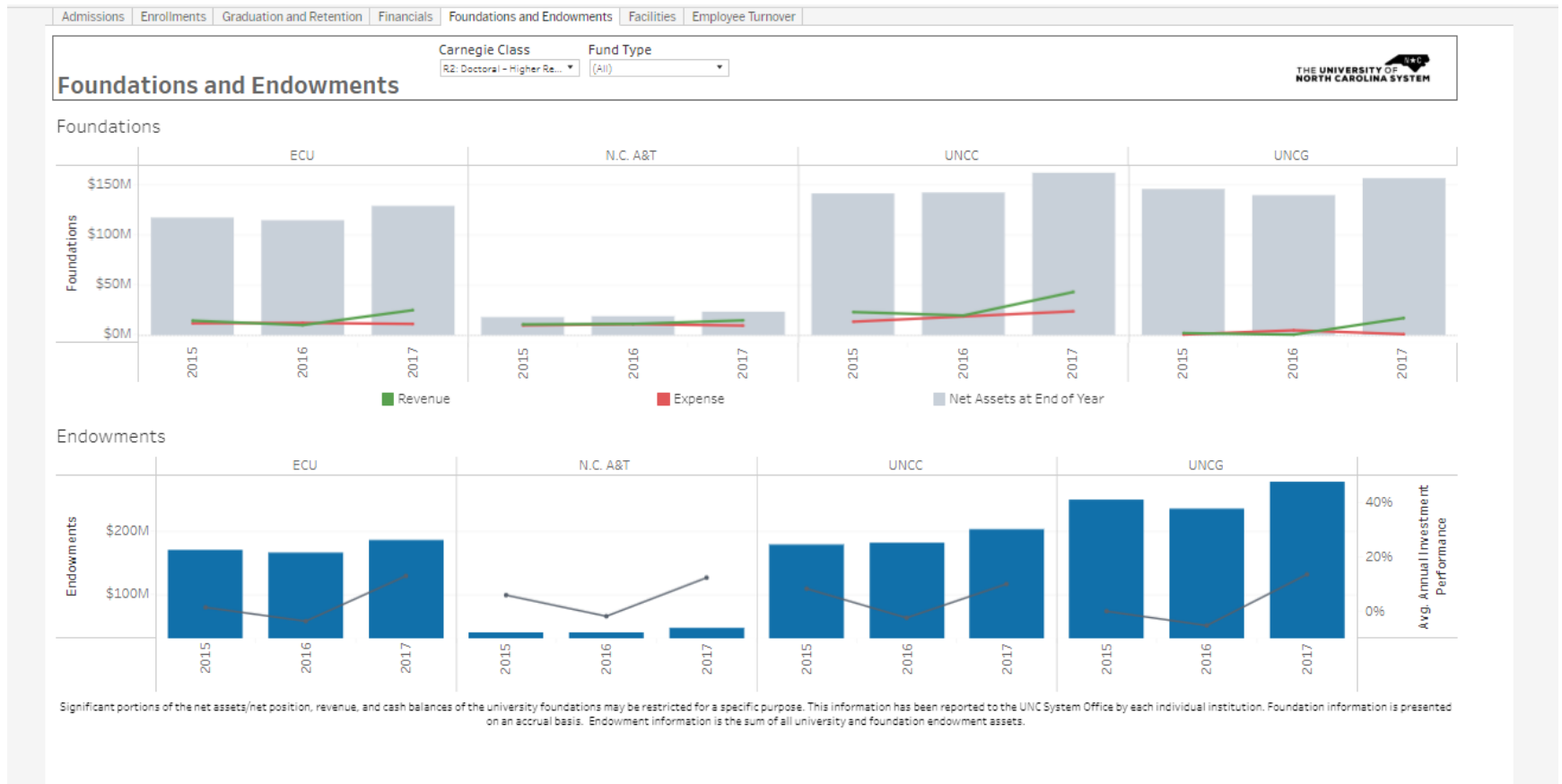
- 3 years of year-end total endowment assets.
- 3 years of average annual investment performance.

Foundations and Endowments Data



Source: Collected from Institutions

Foundations and Endowments – R2 Detail



Source: Collected from Institutions

Foundations and Endowments – Additional Information

Things to Note:

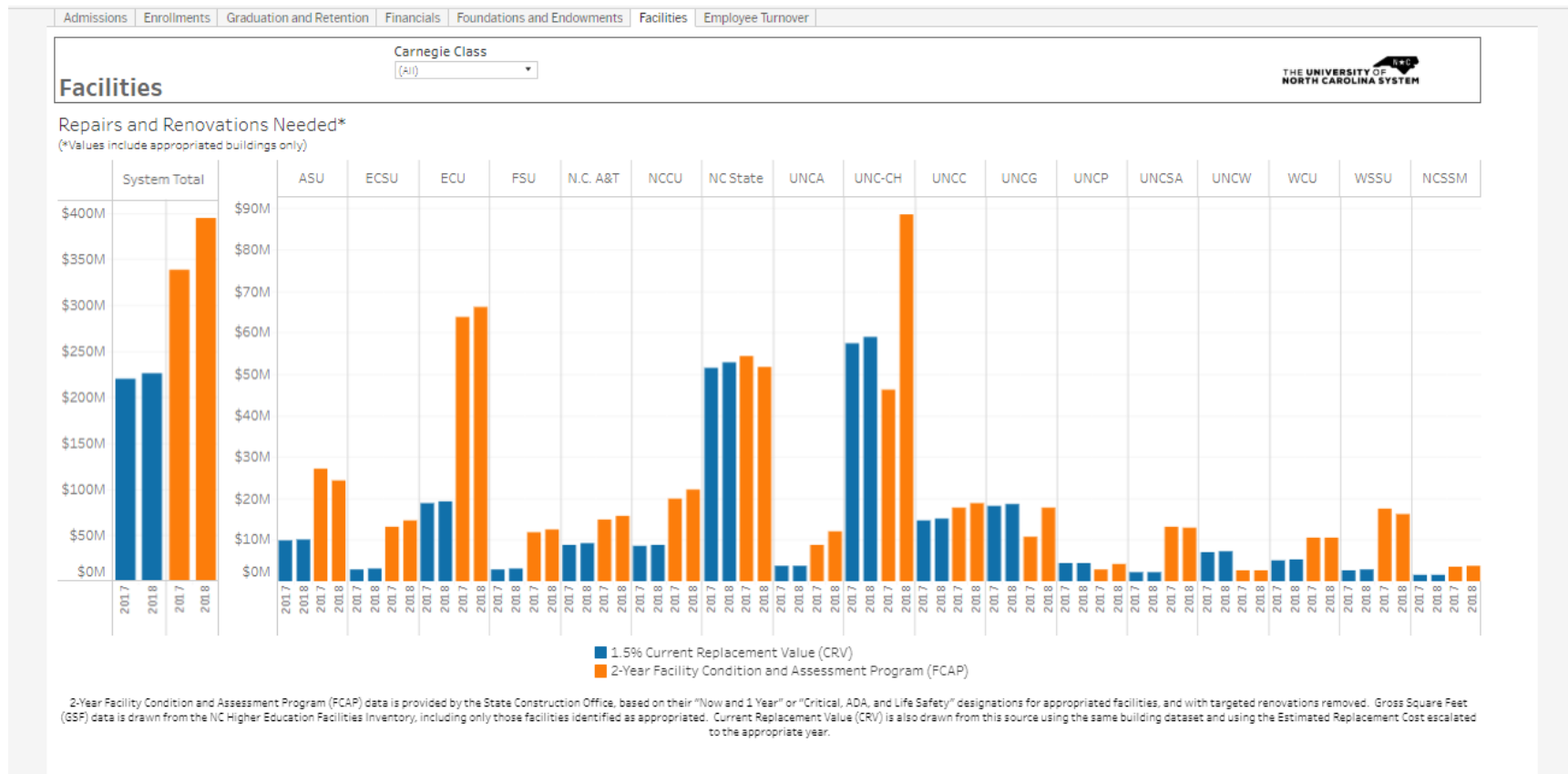
- Much of the foundation assets, revenue, and cash, are restricted to a specific purpose. Funds that are unrestricted may still be obligated for a specific purpose.
- Data included in dashboard was limited to foundations that are included on each institution's financial statement.
- Foundations are determined to be blended or discretely presented based on the nature and significance of their relationship to each respective university.
- The endowment investment performance closely mirrors market performance over this time period.

Facilities – Overview of Information

Tab Contents:

- 2 years of data concerning repair and renovation needs at each institution and for the UNC System:
 - ◆ Facility Condition and Assessment Program (FCAP) data that indicates critical, ADA, and life safety needs (comparable to 2-year needs).
 - ◆ 1.5% of current replacement value (CRV) for appropriated buildings; this is an industry benchmark for repair and renovation needs.
- Appropriated gross square feet (GSF) of space at each institution and a total for the UNC System.
- Ratio of FCAP to GSF and CRV to GSF as an indicator of average need.

Facilities Data



Source: State Construction Office
Higher Education Facilities Inventory

Facilities – Additional Information

Things to Note:

- FCAP is only evaluated every three years; in the interim, needs are escalated to the appropriate year.
- Targeted renovations have been excluded from the FCAP total.
- The full total for repair and renovation needs for appropriated facilities in the UNC System, based on the 5-year FCAP, is \$3.9 billion.
- The industry benchmark of 1.5% of CRV is meant to provide the average need over the lifetime of the building, not the need in any specific year.



DASHBOARD DETAIL

HR Data

HR Data – Overview

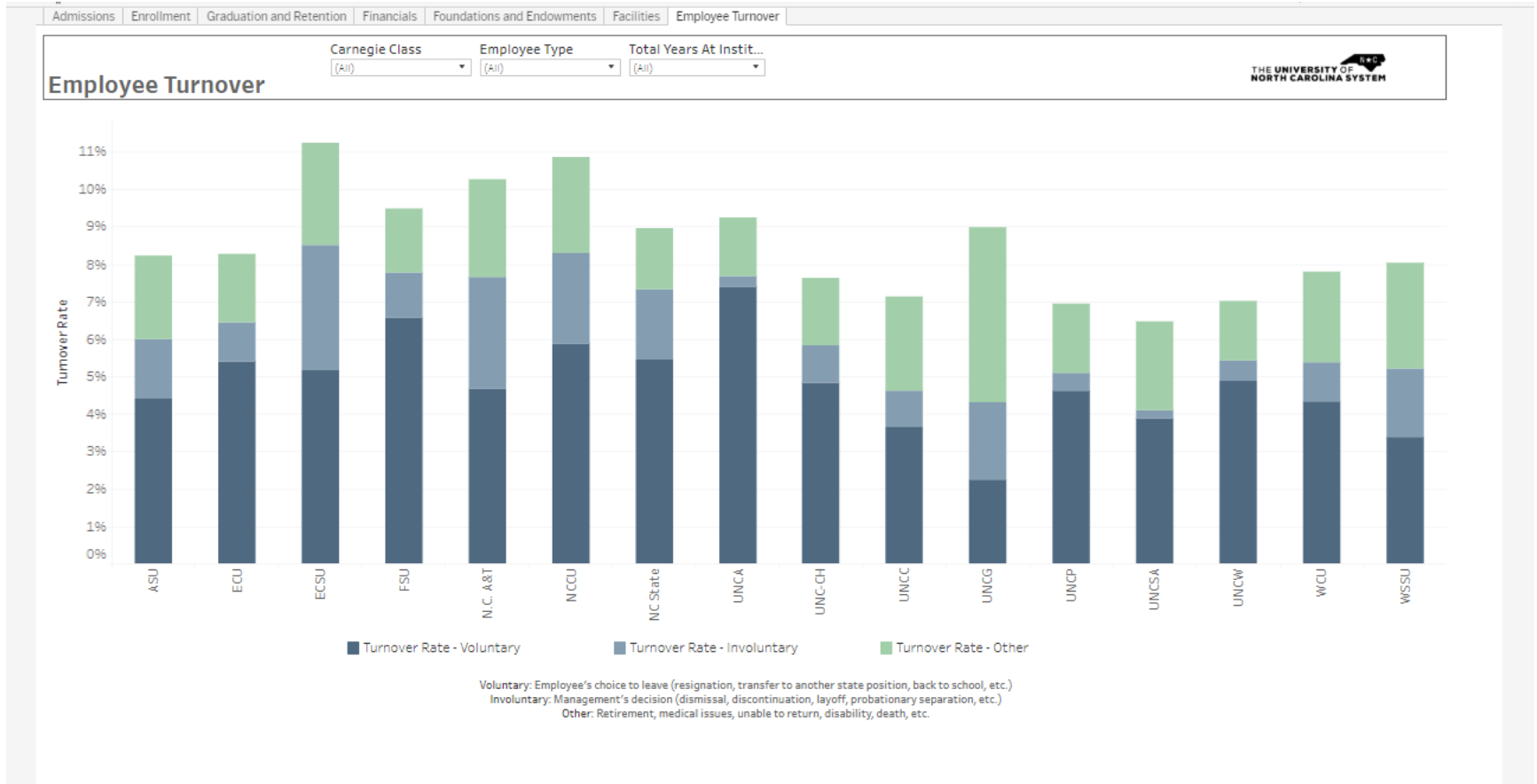
- Source of employee turnover data:
 - HR Data Mart – shared UNC System data warehouse

Employee Turnover – Overview of Information

Tab Contents:

- FY 2017-18 turnover rates by institution for:
 - ◆ Voluntary separation – employee's choice to leave
 - ◆ Involuntary separation – management's decision
 - ◆ Other separations – retirement, medical, disability, death, etc.
- Filter to view turnover rate for EHRA Faculty, EHRA Non-Faculty, and SHRA employee types.
- Filter to view turnover rate by an employee's total years at the institution.

Employee Turnover Data



Source: HR Data Mart

Employee Turnover – Additional Information

Things to Note:

- This is a new measure that was not included in the HR Data Mart before FY 2018.
- Turnover rate is calculated as the number of separations divided by the average monthly employee count.
- Trend data going forward will provide more insight into employee turnover.



DISCUSSION

THANK YOU

CONNECT



www.northcarolina.edu



[uncsystem](https://www.facebook.com/uncsystem)



[@UNC_system](https://twitter.com/UNC_system)



[@UNC_system](https://www.instagram.com/UNC_system)

QUESTIONS?

CONNECT



www.northcarolina.edu



[uncsystem](https://www.facebook.com/uncsystem)



[@UNC_system](https://twitter.com/UNC_system)



[@UNC_system](https://www.instagram.com/UNC_system)