



# MANAGING HIGHER EDUCATION

FROM RECRUITMENT  
TO ENDOWMENT

**COGNOS®**

THE NEXT LEVEL OF PERFORMANCE™



# TURN YOUR DATA INTO AN ASSET

*You're the Director of Information Systems at a leading American university. You have just heard from the President of the university that a major corporation has offered to match the endowments pledged and received by the university over the past six months. But the corporation wants an exact account of those endowments and also a precise projection of where their matching funds will be spent. The CEO of the corporation is meeting with the university's president and the vice president for development in two days. And you have to deliver.*

*You know you and your staff are going to be up to your elbows in spreadsheets for the next 48 hours straight, hunting down the figures the President needs, and you wonder: Isn't there a better way?*

*In fact, there is.*

## **Managing Your Data With Cognos**

With Cognos, you can manage and analyze all your data quickly and efficiently.

You can fine-tune your management of advancements, because the university depends on that revenue, and work more effectively with your alumni.

You can track student recruiting, admissions, and funding.

You can improve financial performance organization-wide, keep track down to the last dollar, and more importantly, know what impact each dollar has.

It's all possible with Cognos. You can analyze activities and results, understand costs and

value, and compare what you are achieving against what your university or college has set out to do.

## **Turn Your Data into an Asset**

An institution of higher education has a lot of information to collect and track. A large university can easily have tens of thousands of students, hundreds of thousands of alumni, and operating budgets in hundreds of millions of dollars.

Big universities are a lot like big businesses. Harvard, for example, has a total endowment of \$17 billion, an amount greater than the 2002 total revenue of Coca Cola. Medium and small universities have plenty of data to track as well. Lots of numbers in lots of databases. Complex systems that need constant monitoring.

Time too is at a premium. So finding new, faster, and more effective ways to manage is critical.

Cognos can help. We can help you take the mountains of data you collect and turn it into an active, useful asset to manage your institution with clarity and efficiency. Cognos solu-

tions can help you improve your management in a number of key areas:

- Advancements and alumni relations
- Student management, including recruiting, admissions, and aid
- Overall financial performance
- Overall organizational performance

A review of each of these areas will clarify how Cognos can assist you in improving your performance and ensuring your institution remains a leader in higher education, an institution you, your staff, your students, and your former students can continue to be proud of.



### **EXPECTED INCREASES IN HIGHER EDUCATION ENROLLMENT: 2003-2012**

*(Total enrollment in all degree-granting institutions in the U.S., full- and part-time)*

2003	15,756,000	2009	16,978,000
2004	15,947,000	2010	17,185,000
2005	16,135,000	2011	17,418,000
2006	16,321,000	2012	17,673,000
2007	16,503,000		
2008	16,738,000		

*Source: National Center for Education Statistics – [http://nces.ed.gov/pubspubs2002/proj2012/Table\\_11\\_2.asp](http://nces.ed.gov/pubspubs2002/proj2012/Table_11_2.asp)*





2002

2002 Q.1
2002 Q.2
2002 Q.3
2002 Q.4

# ADVANCEMENTS: THE LIFEBLOOD OF HIGHER EDUCATION

Advancements are the key to the financial health of a university or college. They can come from a number of sources, including:

- State and other public grants
- Gifts, pledges, and endowments from alumni, corporations, and others
- Institutional research.

Universities and colleges need to understand these sources of revenue better: understanding where the funds come from, the balance in the university budget, the budget expectations, your institution's share of the total funds available. With this information, you can make better decisions about what funding to pursue, and ensure you pursue it more effectively.

In the United States, the top 10 institutions in terms of endowments have approximately \$75 billion from this source of funds (*Source: [www.suttontrust.com](http://www.suttontrust.com)*). Eight of these top ten have doubled their endowment level in the last eight years.

Cognos technology can help you with endowment planning and campaigning, as well as helping you measure against the benchmark for total value and value per student. It can also help you see where you are successful. Extremely valuable to an institution both in terms of revenue and prestige, endowments typically have conditions and mandatory reporting requirements as well. Cognos can help you meet these requirements and maintain their support.

With Cognos, you can answer questions like these:

- Where are we against plan?
- How much did we raise last week?
- What are our most effective fund-raising programs?

Grant funding also can require reports and business cases. By offering automated reports on development, financial, and other data, Cognos can help you avoid the slow and cumbersome use of spreadsheets and manual processes.

## ALUMNI: KEEPING IN TOUCH

Alumni are essential to a vital university. Alumni associations have histories stretching back more than a century and a major US university can have hundreds of thousands of alumni. There can be chapters in the 50 states and countries around the world. Keeping track of these alumni is critical to fostering a continuing relationship with former students.

The school must have up-to-date information on locations and types of alumni, their involvement through alumni programs, their donation history, and any other details that will encourage their participation in the ongoing life of the university or college. Cognos software can help you use the alumni information you have to answer such questions as:

- How many alumni donors contributed in the previous month?

- What percentage of alumni who graduated within the last five years donated gifts or pledges?
- What percentage of pledges has been fulfilled in the past year? What categories of alumni were the source of those pledges?

Keeping close track of alumni, their gifts, and pledges is crucial to managing an important aspect of advancements and ensuring the endowment pipeline continues flowing.



### HOW TO 'DASHBOARD' YOUR ALUMNI

Universities have hundreds of thousands of alumni in their databases. Millions of bits of information, but what can you do with it? To take just one example, with Cognos you could use a dashboard to show a map of the U.S. illustrating the number of alumni in each state. This type of geographic analysis could provide excellent clues on how to maximize donations and endowments. Numerous other types of dashboards could be called up as well:

- Donation rates and amounts among certain occupational types of alumni
- Donation rates among 5-year, 10-year, 20-year alumni
- Donation rates among alumni who were also graduate students
- Other geographical breakdowns (cities, counties in the school's home state, and so on)







## SUCCESS STORY

### University of Toronto: *Fundraising and Planning*

The University of Toronto ranks as a major North American university, with 60,000 students, 365,000 alumni, and an operating budget of \$900 million. Founded in 1827, it is today considered one of the top research universities in the world.

The University of Toronto has implemented a business intelligence solution from Cognos to better support academic planning processes and fundraising initiatives. The university can now access critical student and operational data in just minutes instead of weeks and is able to make better, faster decisions about student funding.

Student funding is a crucial business function for universities because students are given educational opportunities they would not be able to afford otherwise. This is a key means for universities to draw the most desirable students into their programs.



### U.S. HIGHER EDUCATION FINANCIAL SOURCES (NON-TUITION) IN 2001

Total Funding: \$24.2 billion

Alumni contributions: 28%

Foundations: 25%

Non-alumni contributions: 21%

Corporations: 18%

Religious organizations: 2%

Other organizations: 6%

*Source: Council for Aid to Education press release, March 22, 2002*

[www.rand.org/hot/press.02/vse.3.22.html](http://www.rand.org/hot/press.02/vse.3.22.html)

Using Cognos, the university aggregates and analyzes data drawn from many disparate systems, enabling employees to understand what level of funding students are receiving as well as its sources (i.e. scholarships, teaching assistant positions, research grants, awards). As each student is guaranteed a certain level of funding based on their program, Cognos helps the university determine if that metric is being met, and helps identify those students who qualify for additional funds.

Cathy Eberts, associate director for the Administrative Management Systems at the University of Toronto, says, “Cognos' powerful analytical capabilities have enabled us to gain a much more comprehensive view of where our student funding dollars are being spent and

allows us to be more proactive in the planning process. With Cognos we can aggregate, analyze, and deliver the data in a format that can be easily accessed and used to make business decisions that will positively affect the lives of our students and will contribute to their educational experience at the university.”

Cognos is also being used in the critical area of advancement, to analyze and report on fundraising campaigns. The university can determine which divisions are running campaigns and which divisions have met their fundraising goals. Visibility down to the individual donor level allows the university to build custom fundraising campaigns targeted at their most loyal supporters.

Ms. Eberts adds, “We've been able to answer questions in hours or minutes that took weeks before.”

The U of T is planning to expand its use of Cognos in other departments, including more detailed analysis of HR, and satisfying reporting and regulatory requirements. “We want to have a reporting tool that takes us into the future and I think Cognos has a lot of that potential,” Ms. Eberts explains. “I like the fact that it isn't just one product. It's a range of products and you can grow with it.”

# STUDENT MANAGEMENT: CREATING “STUDENTS FOR A LIFETIME”



While most college and university mottos center on the ideas of knowledge, wisdom, and virtue, the institutions exist to impart these values to people. Institutions of higher education increasingly see the co-dependence between educators and the educated, particularly in the pragmatic world of finances.

The relationship between the institutions and their students extends beyond the time in which the student is enrolled. You need to create “stu-

dents for a lifetime.” For their initial success, you want students to stay with the university for the duration of their degree or series of degrees. But you also want the students to identify with their university as they continue to succeed and see themselves as alumni. The relationship continues through their contributions to the school in the form of gifts, pledges, and fund-raising activities.

You want students to have a successful, satisfying, and life-long experience with your university or college. Your management of the student relationship, from beginning to end, is critical.

Cognos can help you with student management in a number of key areas:

- Recruiting and admissions
- Classroom performance and curriculum management
- Student aid financing
- Placements

## **Finding the Students to Meet Your Goals**

With Cognos, you can map your recruiting and admissions policies and strategies against desired student population profiles. You can monitor data elements such as gender, ethnicity, socio-economic levels, SAT scores, grades, and other metrics. You need to understand this data

and make decisions to achieve your plans for diversity and success in your student population. The reporting and analysis capabilities of business intelligence let you identify the candidates that fit your population requirements and improve the admissions and recruiting process.

#### **Measuring Classroom Performance and Analyzing Curriculums**

In lecture halls and classrooms, Cognos helps you measure individual student performance across courses and disciplines and compare against academic benchmarks.

Cognos can help you improve management of your curriculum offerings, by tracking trends in course enrollment, analyzing the relationship between curriculum and revenue, defining the classroom factors that lead to better performance, and optimizing the mix of instructor pro-

files (e.g., tenure, non-tenure, lecturer, etc.)

#### **Tracking Student Aid**

Tracking and monitoring student financial assistance is complex. With a range of state and federal funds available—many with race and income requirements and guidelines—keeping track can be an onerous task. Cognos helps you monitor who receives what forms of aid and lets you maximize the amount of resources available to any single student.

#### **Portals and Placements**

Cognos can also help you set up useful student portals online, an essential component of a modern university or college. These portals can help you disseminate key student information on curriculum, finances, housing, administration, and so on.

You can also manage student placements for work-terms or post-graduation jobs; increasing the quality of those placements by measuring the record of previous placements.

As universities and colleges align their processes and operations to keep students for life, both the institutions and students benefit. Students have a complete educational experience that they see as beneficial, successful, and long-term. And the school can reap the benefits of this relationship for a lifetime.



*Leadership*





## SUCCESS STORY

### Trinity College:

#### *Tracking All-Important Private Support*

At Trinity College, an independent, nonsectarian liberal arts school in Hartford, Connecticut, business intelligence from Cognos is a key factor in employing data to maximize fundraising efforts. Fundraising is crucial to the success of higher education.

Trinity College, with 1,900 students, raised \$31 million in gifts and pledges in FY2001 (with an operating budget of \$86.5 million). This means there is a copious amount of critical fundraising information to track and monitor: gifts, pledges, donor count, gift count – 16 measures in all. In this fast-changing environment, it helps that Cognos makes it possible to refresh data on new gifts and pledges on a daily

basis, which means fundraising information is always current.

Gwen Stengel, Technology Solutions Specialist at Trinity, notes, “The Advancement, or Fundraising, Office can tell how much money we’ve raised this year; how many donors; how many unique donors this year over the past ten years; actual gift dollars and pledged dollars; and they can slice it and dice it in many different ways.”

It’s critical that Trinity can keep track when transactions are adjusted or posted, so nothing gets lost in limbo.

The Alumni Office is also using Cognos to understand the population of the alumni – where they live, gender, status, ethnicity, and so on.

The Cognos solution offers a multitude of ways to do quick and easy counts. Stengel adds, “We were able to create one dreaded report, that usually took hours, in seconds. The team was able to customize their constituent groupings to their liking, and when the Alumni folks were shown they could save this view to their personal news box or to a shared Alumni Office folder, they were delighted.”

The value of Cognos to fundraising in colleges and universities is clear. In the future, Stengel says they plan to apply Cognos solutions to admissions, curriculum and registrar data, and finance (part of Trinity finance already uses Cognos).

“But we don’t call it Business Intelligence,” Stengel points out, “we call it Institutional Intelligence.”

# IMPROVE OVERALL FINANCIAL PERFORMANCE

Financial performance is a driving issue in higher education. Keeping track of funding and revenue is a crucial aspect of ensuring the university or college can continue to deliver quality to its students, can attract the best teachers and researchers, and can build or renew the facilities it needs.

Efficient budgeting and planning, tracking and understanding the drivers of financial performance enable higher education institutions to effectively manage their organizations. Revenue analysis, profit analysis, and marketing analysis are all extremely important to the financial health of colleges and universities.

## **Getting the Data on Revenue and Expenses**

Revenue can come from a number of sources including student tuition, local and state governments and agencies, alumni and endowments and so on. You want to be able to track the sources and amounts of this revenue, even down to the detail of tracking revenue from

student rent, services, bookstores, and parking. You want to be able to monitor where the most profits come from and if there are any unprofitable services that could be discontinued or outsourced.

You must also have useful, usable data on expenses, and be able to determine what the costs are and where they can be trimmed or eliminated. Is your institution's compensation in line with the normal range of from 60 to 70 per cent of expenses? What areas lead or lag?

With Cognos you can access the data you need, get a clear view into past financial performance, and be able to plan your institution's financial future with a high level of accuracy.

## **Compliance and Quarterly Reporting**

Compliance reporting in the areas of advancements, government and research grants, and accreditation is essential for institutions of higher learning. Cognos can help you establish a consistent financial environment from which

to produce complex compliance reporting. Because the Cognos solution is automated, you also avoid the tedious, slow use of spreadsheets to deliver your regular quarterly reports.

## **Tracking Research Funding**

Tracking research funding is another complex area where Cognos can help ease the pain for colleges and universities. Research grants and expenses must be tracked with care and every dollar accounted for. Many other details of the research project must be collected and reported on. Compliance reporting requirements, especially for State and Federal governments, can change as often as four times a year. All these details must be tracked and available for reporting when required.

A solution such as Cognos can save days or weeks of time and effort when it comes to meeting financial reporting requirements.

1,979,446,265	907,600,405	882,438,400
1,059,231,897	554,969,479	579,529,400
7,000,000,000	274,305,116	281,280,000
	1,736,875,000	1,711,070,000
36,219	34,790	38,070
4,951	1,470	1,870
193,270	49,925	49,070
8,730,894,682	1,417,693,548	1,403,020,000
3,834,833,153	903,197,663	885,968,000
4,318,504,283	1,073,734,602	1,053,452,000





# IMPROVE OVERALL ORGANIZATIONAL PERFORMANCE

With Cognos, you can consolidate and coordinate information across applications and disparate databases into a single repository for rapid analysis and reporting. This means you can improve your overall organizational performance.

With a single data repository, you can gain a holistic view of your organization. You can understand the relationships between financial data, staffing, enrollment, curriculum, and so on.

Cognos enables you to easily distribute routine reports across the organization, typically

through a Web portal, featuring a rich, easy-to-use information service and delivered securely to staff, faculty, and students. In this way, everyone has the same information and operates from a single, consistent version of the data.

## Monitor Performance Against Goals

With Cognos, you can also monitor and measure your performance against the goals you have established for success. Cognos helps institutions model plans or strategies as a set of inter-connected performance indicators.

This can communicate goal-driven metrics to thousands of employees across the organization.

These metrics can be easily monitored and understood by everyone in the organization. Employees can see how their decisions and actions affect the overall strategy. They have the information that connects strategic priorities to their own priorities – the basis for their accountability. In this way, a common version of what should take priority can be communicated throughout the organization.



## CORPORATE PERFORMANCE MANAGEMENT: ALIGN YOUR STRATEGY WITH EXECUTION

Only Cognos delivers solutions to drive your organization's performance to the next level, by allowing you to drive, monitor, and understand business performance.

Cognos enables corporate performance management (CPM) with software capabilities for planning, scorecarding, and business intelligence. Cognos CPM solutions are the key to aligning tactics with strategy across the institution.



## ABOUT COGNOS

Cognos is the world leader in business intelligence and enterprise planning software. Our solutions for corporate performance management let organizations drive performance with planning and budgeting, monitor it with scorecarding, and understand it with enterprise business intelligence reporting and analysis. Cognos is the only vendor to support all of these key management activities in a complete, integrated solution.

Founded in 1969, Cognos today serves more than 22,000 customers in over 135 countries. Cognos enterprise business intelligence solutions and services are also available from more than 3,000 worldwide partners and resellers.

### CONTACT US

For more information about Cognos and our complete performance management solution, visit our Web site at [www.cognos.com](http://www.cognos.com)



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