MIAMI UNIVERSITY

Miami University
Summer Challenge:
Forecasting Summer Term Class Profitability

Public University Serving Over 16,300 Students Annually

Industry: Education

Role: Business Intelligence Design and Implementation

Business Challenge: Deteriorating economic conditions in 2008-2009 created a significant budget shortfall. The need for expense reductions in staffing, capital and operating budgets created an opportunity to ramp up a fledgling BI program. By December 2008, Miami's leadership identified the need to **forecast summer term class profitability** before finalizing summer course registration as an expense initiative which could dramatically improve the projected financial position while maintaining the University's excellent student outcomes.

Allowing Miami's leadership team to approach these decisions with disciplined, data–driven decision–making will allow them to save the University millions of dollars. With the Enrollment, Human Resources, Timesheet and Payroll functional data now online, Miami's leadership is positioned to dramatically impact the University's financial bottom line while maintaining or improving student outcomes.

Testimony: *"Summer Challenge: Expense of the courses by course and department."*   – *Provost*

The Summer Challenge is to cost–effectively offer courses while making them individually and collectively profitable. Low student counts, high use of tuition waivers and unique labor contract features drive a much more volatile and fragile profitability balance. Accurate profit and loss forecasts at every expense level (e.g., course, dept., campus and university) provide an opportunity to save money while maintaining student outcomes. The IT team leveraged the summer 'Enrollment End of Term' data (adding current term information) and then combined it with new 'Expense' data for course–section level profit and loss information— and presented combined enrollment and expense information to Deans, Vice Presidents and executives.

Solution:
- Focus on specific, targets, high–value BI initiatives
- Involve multiple source systems
- Exploit existing BI footprint and put power in the hands of analytical 'power users' and departmental decision–makers quickly and cost–effectively
- Roll out without a high gloss vendor presentation layer

This unconventional strategy allowed Miami University to create an institutional appetite for BI and the Strategic Oversight Team is already prioritizing an 18 month plan for an emerging and sustainable campus–wide BI program.

Technologies: Today: Microsoft SQL Server, Analysis Services and Microsoft Excel pivot tables.
Future: Deploy MS Reporting Services and a "best of breed" presentation layer.