

# Cal Answers Dashboard Training

## Student Financials Subject Area

(contains data from 2010-11 to the present)

### Key Questions Answered by the Student Financials Dashboards

#### Student Affordability

1a) How much federal student loan debt are degree recipients graduating with? (shown as an average dollar amount or in ranges):

- a. ...by degree level (e.g., Bachelor's, Master's)
- b. ---by select demographics (e.g., Residency)
- c. ...by family income range
- d. ...within a given unit on campus (e.g., Department, College)
- e. ...by entry status\* (e.g., Freshmen, Transfer)
- f. ...by dependency status\* (i.e., independent versus dependent student)



\*Entry status and dependency status are relevant for undergraduates only. Therefore these filter options are NOT available on the "Graduate Degree Recipient Debt" tab of the Affordability Dashboard.

1b) What percentage of degree recipients have federal loan debt that falls within a particular range?

2) How many students who graduated within a given Aid Year (e.g., Graduation Aid Year 2011-12) had federal loan debt at time of graduation?

**Note:** The Aid Year begins with a given Fall semester and includes the Spring and Summer semesters that directly follow. Example: Fall 2011, Spring 2012, and Summer 2012 make up the 2011-12 Aid Year. This is different from the Academic Year, which is used in other subject areas, such as the Degrees subject area. The Academic Year begins with a given Summer semester (e.g., Summer 2011, Fall 2011, Spring 2012 make up the 2011-12 Academic Year).

3) What are the trends in the amount of federal loan debt students have at time of graduation? What are the trends in the % of students who have federal loan debt at time of graduation?

4) How does a given unit (e.g., Department) compare to the overall campus on each of the questions above?

**Note:** The Student Affordability dashboard only contains data for federal student loan debt incurred by the student. It does NOT include private loan debt incurred by the student (or parent), nor does it contain federal parent loan debt.

## Key Questions Answered by the Student Financials Dashboards (Cont'd)

### Student Fees & Payments

- 1) What were the total fees charged to students for a given timeframe? What was the average amount of various fees charged to students for a given timeframe?
- 2) What are the various types of fees being assessed to students? (e.g., non-resident supplemental tuition, health insurance, housing and dining)
- 3) How are students paying the fees assessed to them?

### Student Financial Aid

- 1) What percentage of undergraduates received financial aid in a given Aid Year? What percentage received gift aid and what was the average amount? (Fast Facts)
- 2) What percentage of undergraduates took out loans within a given Aid Year, and what was the average amount that they borrowed? (Fast Facts)
- 3) What percentage of students had a parent who took out loans? What was the average parent loan amount borrowed? (Fast Facts)
- 4) How many registered undergraduates were Pell Grant recipients? (Fast Facts)
- 5) How many students received a particular financial aid award type? How does this vary by:
  - a. ...education level (e.g., Freshman, Sophomore)
  - b. ...undergrad/graduate status
  - c. ---residency
  - d. ...family income range
  - e. ...a given unit on campus (e.g., Department, College)
  - f. ...entry status (e.g., Freshmen, Transfer)
  - g. ...dependency status (i.e., independent versus dependent student)
- 6) What is the average award amount, by award source (e.g, Federal, State, UC)?

## Select Resources - Student Financials Dashboards

### Student Affordability Video Tutorial:

[Student Affordability: Cumulative Federal Debt at Time of Graduation \(4 min\)](#)

### Wiki & Subject Area Overview:

[Student Financials Wiki](#)

[Subject Area Project Overview](#)

# Cal Answers Dashboard Homework

## Student Financials (Dashboards)

Directions: Use the Student Financials dashboard to answer the following questions.

### Problem set 1: Student Affordability

- a) What percentage of undergraduates graduating in the 2013-14 aid year had federal loan debt at time of graduation?
- b) What percentage of the 2011-12 undergraduate degree earners in the College of Engineering had federal debt at time of graduation? Was this percentage of borrowers higher or lower than it was for the campus for that same year?
- c) What percentage of undergraduates who entered as transfer students and graduated in the 2011-12 aid year had federal debt at time of graduation that was between \$20,001 and \$30,000?
- d) What was the average federal loan debt at time of graduation for the 2011-12 undergraduate degree earners in the College of Letters & Science who entered as transfer students?
- e) What was the average federal loan debt at time of graduation for the 2011-12 Optometry Professional degree earners?

### Problem set 2: Student Financial Aid

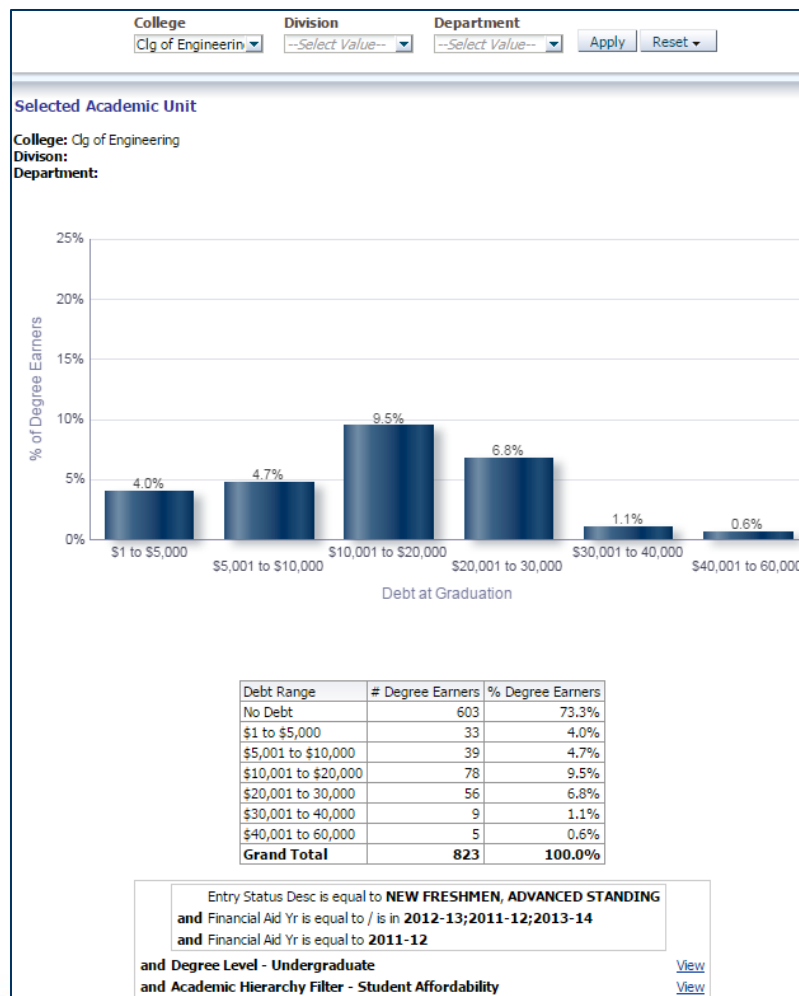
- a) What was Berkeley's total 2013-14 count of Pell Grant recipients?
- b) In 2011-12 (Fall/Spring only), for undergraduates in the Astronomy Department, what was the average loan amount? What was the breakout, by loan amount, of the different types of loans for these students?
- c) Over a 3-year period (starting with 2010-11 Fall/Spring only), for students in the \$80K - \$140K family income range, what was the most important award source of financial aid?

# Cal Answers Dashboard Homework

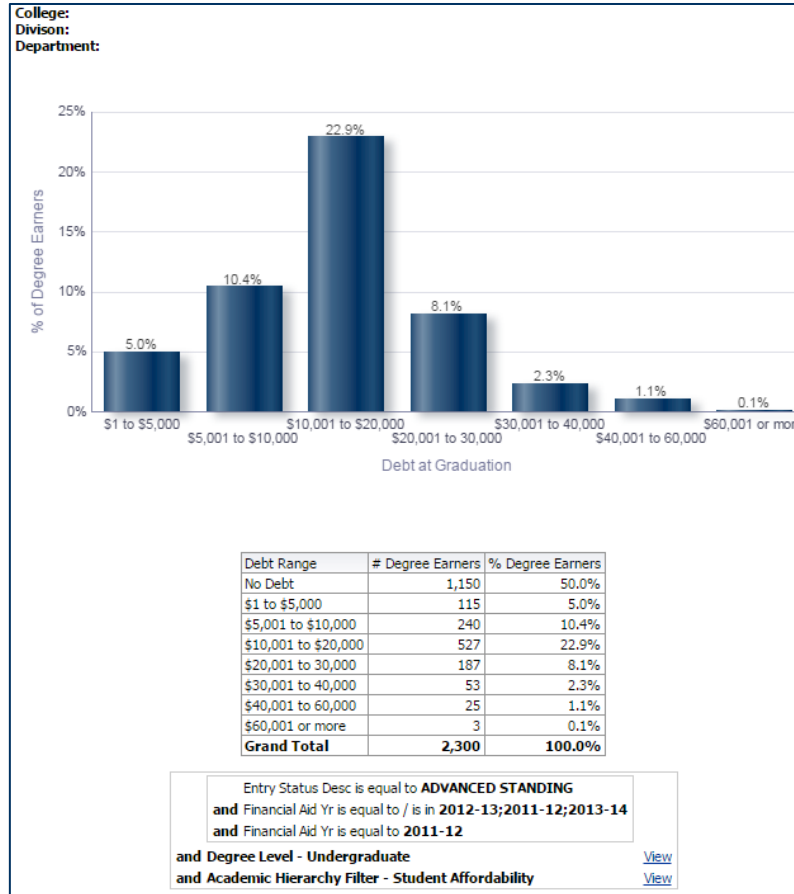
## Answer Key: Student Financials (Dashboards)

### Problem set 1: Student Affordability

- a) What percentage of undergraduates graduating in the 2013-14 aid year had federal loan debt at time of graduation? **Based on the Fast Facts on the Overview tab, 40% of Bachelor's degree recipients graduating in the 2013-14 aid year had federal loan debt at time of graduation.**
- b) What percentage of the 2011-12 undergraduate degree earners in the College of Engineering had federal debt at time of graduation? **26.7% (100% minus the 73.3% of the graduating students who have "No Debt" in the table shown below)**  
**Was this percentage of borrowers higher or lower than it was for the campus for that same year? 41.5% is the campus figure. Thus, in the 2011-12 graduation aid year there was a lower percentage of BA degree recipients with federal loan debt in the College of Engineering, as compared to the campus.**



- c) What percentage of undergraduates who entered as transfer students and graduated in the 2011-12 aid year had federal debt at time of graduation that was between \$20,001 and \$30,000? **8%**



- d) What was the average federal loan debt at time of graduation for the 2011-12 undergraduate degree earners in the College of Letters & Science who entered as transfers? **\$15,281**

Selected Academic Unit

College: Clg of Letters & Science  
Division:  
Department:

Debt Range	# Degree Earners	% Degree Earners	Avg Debt Amt	% Ever Pell
No Debt	857	48.0%		28.9%
\$1 to \$5,000	93	5.2%	\$3,091	74.2%
\$5,001 to \$10,000	189	10.6%	\$7,286	72.0%
\$10,001 to \$20,000	422	23.6%	\$14,592	71.3%
\$20,001 to \$30,000	158	8.9%	\$23,885	73.4%
\$30,001 to \$40,000	45	2.5%	\$34,262	86.7%
\$40,001 to \$60,000	19	1.1%	\$47,189	89.5%
\$60,001 or more	2	0.1%	\$72,759	
<b>Grand Total</b>	<b>1,785</b>	<b>100.0%</b>	<b>\$15,281</b>	<b>51.9%</b>

Entry Status Desc is equal to **ADVANCED STANDING**  
and Financial Aid Yr is equal to / is in **2012-13;2011-12;2013-14**  
and Financial Aid Yr is equal to **2011-12**  
and Degree Level - Undergraduate [View](#)  
and Academic Hierarchy Filter - Student Affordability [View](#)

- e) What was the average federal loan debt at time of graduation for the 2011-12 Optometry Professional degree earners? **\$99,555**

**Selected Academic Unit**

College:  
 Divison:  
 Department: Optometry

Debt Range	# Degree Earners	% Degree Earners	Avg Debt Amt	% Ever Pell
No Debt	3	5.0%		33.3%
\$5,001 to \$10,000	1	1.7%	\$8,500	
\$20,001 to 30,000	4	6.7%	\$27,219	
\$30,001 to 40,000	14	23.3%	\$36,430	42.9%
\$40,001 to 60,000	7	11.7%	\$49,052	14.3%
\$60,001 or more	31	51.7%	\$151,738	45.2%
<b>Grand Total</b>	<b>60</b>	<b>100.0%</b>	<b>\$99,555</b>	<b>36.7%</b>

Financial Aid Yr is equal to / is in **2012-13;2011-12;2013-14**  
 and Financial Aid Yr is equal to **2011-12**

and Degree Level 1 Desc is equal to **Professional**  
 and Academic Hierarchy Filter - Student Affordability [View](#)

[Export](#)

**Problem set 2: Student Financial Aid**

- a) **What was Berkeley's total 2013-14 count of Pell Grant recipients? Using the Fast Facts on the Overview tab, you can see that the 2013-14 Pell count is 8,821 for Fall/Spring, or 9,176 if Summer 2014 pre-matriculates who were admitted for Fall 2014 are included. Note: Reports on several tabs will show the count of Pell recipients. To replicate the Fast Facts number, you'll need to select only undergrads using the Undergrad/Grad filter.**
- b) **In 2011-12 (Fall/Spring only), for undergraduates in the Astronomy Department, what was the average loan amount? What was the breakout, by loan amount, of the different types of loans for these students? You could use the "Financial Aid Awards by Type" tab for this, setting the filters appropriately. The average loan amount was \$6,338. All of the loans were federal, with 28% being Parent PLUS, 56% subsidized direct, 11.5% unsubsidized direct, and 5% Perkins.**

**Award Category Detail by Source**

Financial Aid Yr: 2011-12 | Award Category: LOANS

Award Source	Award Desc	Award Paid Amt	Award Paid Dist %	Count - Awarded Students	Average Award Paid Amt
FEDERAL	FEDERAL PARENT PLUS LOAN	\$35,003	27.6%	4	\$8,751
	FEDERAL SUBSIDIZED DIRECT LOAN	\$70,620	55.7%	19	\$3,717
	FEDERAL UNSUBSIDIZED DIRECT LOAN	\$14,537	11.5%	9	\$1,615
	PERKINS LOAN PROGRAM	\$6,600	5.2%	3	\$2,200
<b>FEDERAL Total</b>		<b>\$126,760</b>	<b>100.0%</b>	<b>20</b>	<b>\$6,338</b>
<b>Grand Total</b>		<b>\$126,760</b>	<b>100.0%</b>	<b>20</b>	<b>\$6,338</b>

- c) **Over a 3-year period (starting with 2010-11 Fall/Spring only), for students in the \$80K - \$140K family income range, what was the most important award source of financial aid? Use the "Financial Aid Profile by Income" tab for this question, and change the dropdown above the "Awards to Students in an Income Range by Source" table. You can see that in 2010-11, federal aid was about 55% of the total and UC aid was 35%. In 2011-12, it was 50% federal aid versus 42% UC aid, and in 2012-13 it was 44% versus 45%.**

**Awards to Students in an Income Range by Source**

Family Income Range: \$80,001 to \$140,000

Award Source	Award Paid Amt			% - Award Paid Amt			Average Award Paid Amt		
	2010-11	2011-12	2012-13	2010-11	2011-12	2012-13	2010-11	2011-12	2012-13
FEDERAL	\$25,260,103	\$25,415,208	\$22,168,094	54.5%	49.9%	44.0%	\$7,625	\$10,866	\$6,055
STATE	\$2,398,039	\$1,194,119	\$1,262,112	5.2%	2.3%	2.5%	\$8,327	\$7,805	\$11,071
UC	\$15,961,617	\$21,608,157	\$22,698,856	34.5%	42.4%	45.0%	\$4,559	\$6,423	\$6,564
OUTSIDE	\$2,689,267	\$2,760,190	\$4,268,484	5.8%	5.4%	8.5%	\$4,768	\$4,826	\$6,830
<b>Grand Total</b>	<b>\$46,309,026</b>	<b>\$50,977,674</b>	<b>\$50,397,547</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>\$9,735</b>	<b>\$13,380</b>	<b>\$13,290</b>