

Cal Answers: Student Financials Initiative

CAN Session
March 15, 2013

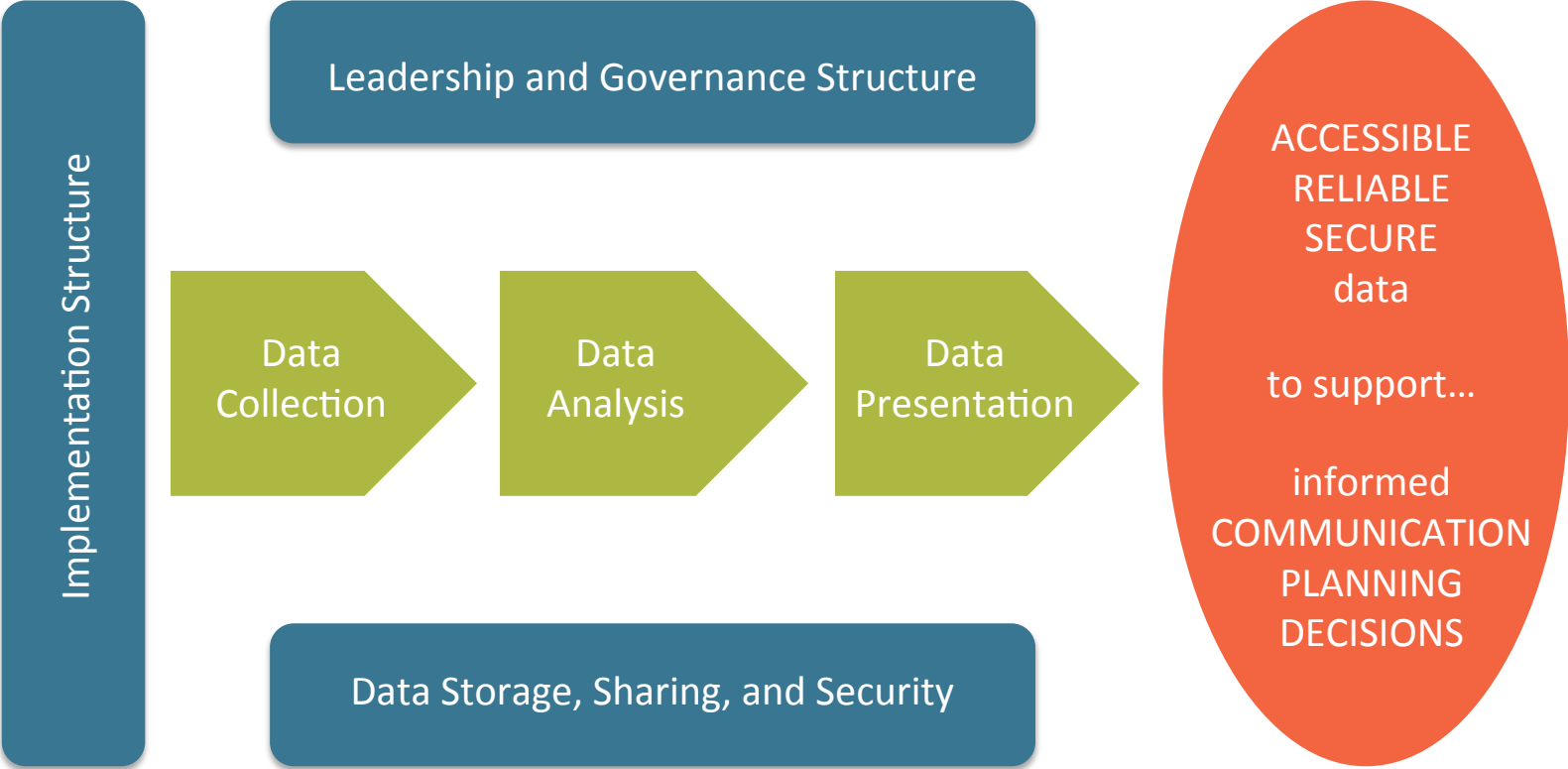


Introductions

- Erin Gore
 - Associate Vice Chancellor/Chief Financial Officer
- Cruz Grimaldo
 - Associate Director, Financial Aid & Scholarships Office
- Kelle Jacobs
 - Business Analyst, Office of Planning & Analysis

How does Cal Answers fit within the broader campus data strategy?

Institutional Data Management and Governance Roadmap

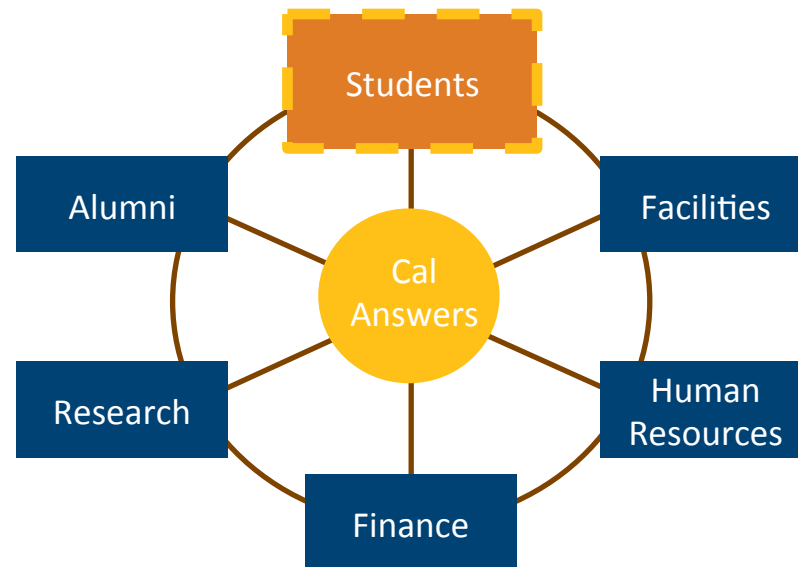


What is Cal Answers?

IT'S AN ANALYTICAL TOOL allowing staff, faculty, and students to explore, visualize, and analyze centralized, integrated information from various Berkeley enterprise systems

THE GOAL IS to make data easily accessible, reliable, consistent, and secure to support informed planning, decision-making, and communication

USE IT TO monitor goals, improve processes, inform strategic decisions, and accurately communicate about who we are as a campus



Agenda

- **Overview:** Cal Answers tool and Student Financials reporting
- **Discussion:** Using Student Financials reporting to answer campus' key questions about access, affordability, academic excellence, and financial stability
- **Get involved and learn more:** Cal Answers and Student Financials opportunities and resources

What is the Cal Answers Student Financials reporting initiative?

THE INITIATIVE provides data to facilitate the best decisions possible regarding access to affordable education and financial planning

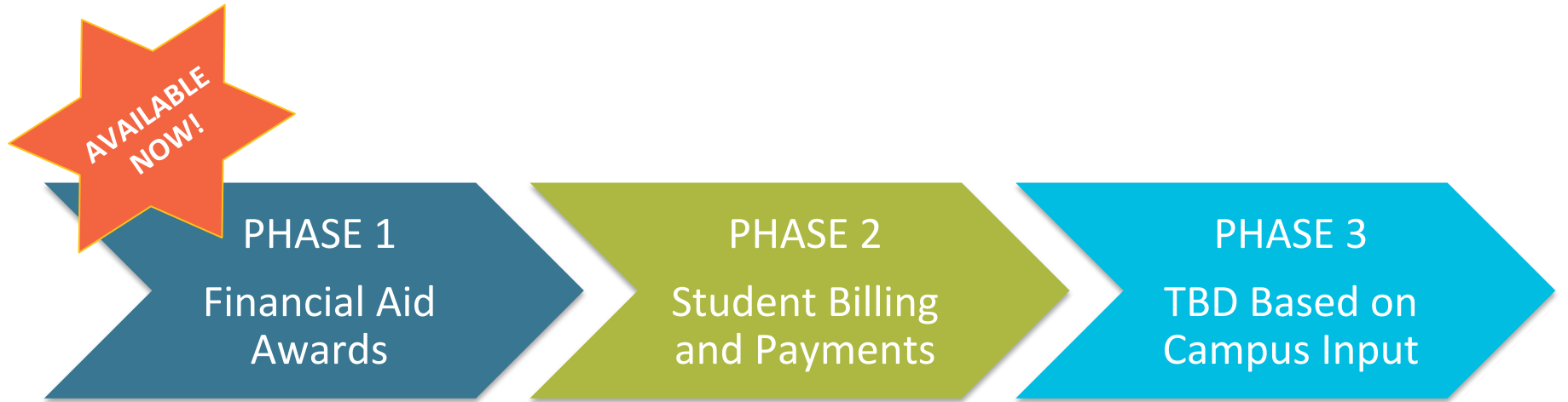
THE GOAL IS to provide insights that inform decisions about:

- making a UC Berkeley education affordable
- improving our recruitment of the best and most diverse candidates
- defining our role as an excellent and accessible public institution

USE IT TO communicate internally and inform strategic decisions

- **NOTE:** if you are in a role that requires external information sharing, be sure to partner with the Financial Aid and Scholarships Office to develop the accurate context surrounding the data prior to communicating externally

Which Student Financial data will be incorporated into Cal Answers?



Impress me with the power of Cal Answers! What happened in undergraduate financial aid in the 2011-2012 academic year?

What percent of students received some form of financial aid?

A: 54%

B: 63%

C: 76%

What was the average loan amount?

A: \$6,672

B: \$8,507

C: \$10,438

What was the average gift amount?

A: \$8,738

B: \$11,535

C: \$14,946

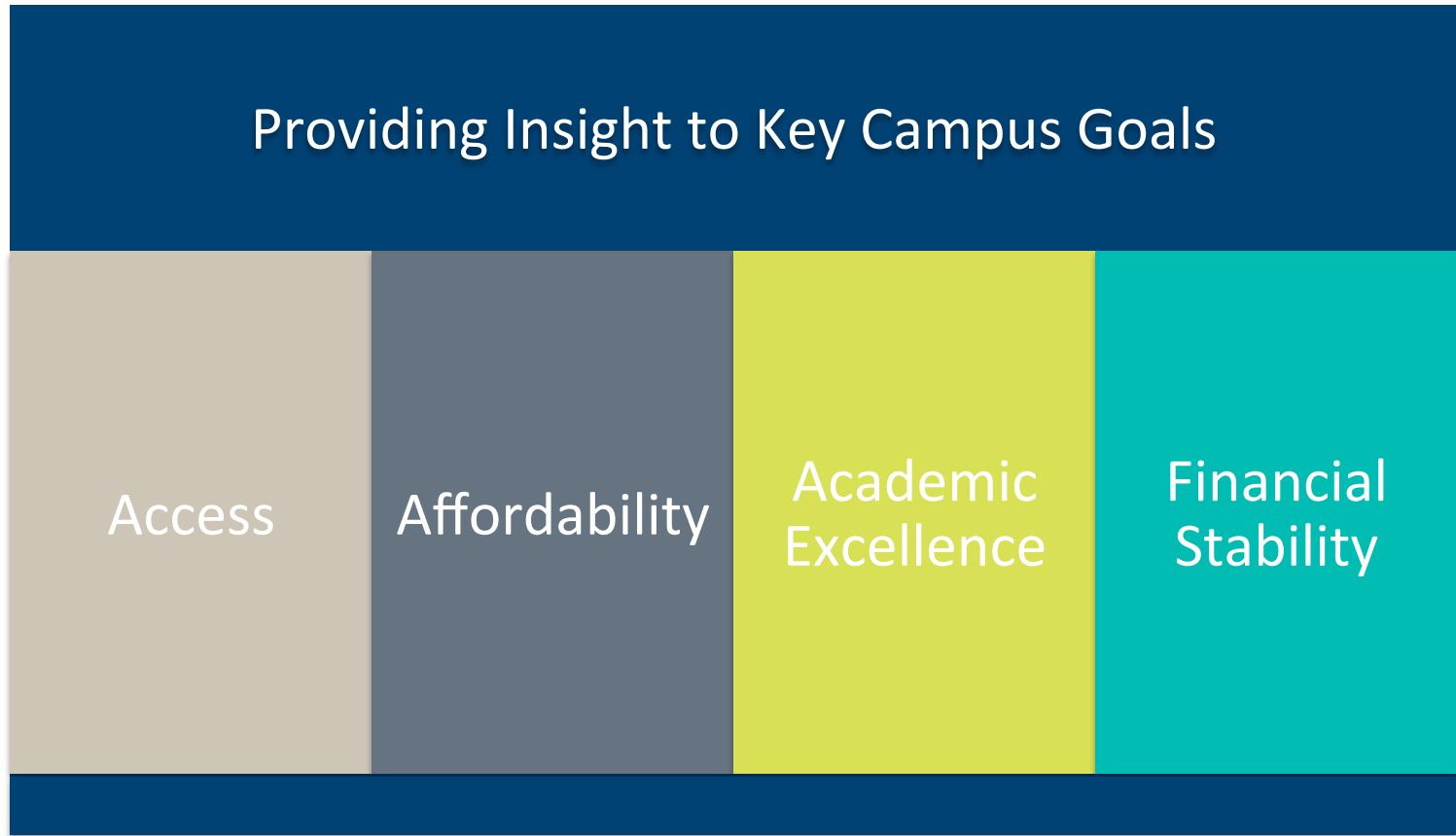
How many students were Pell recipients?

A: 7,962

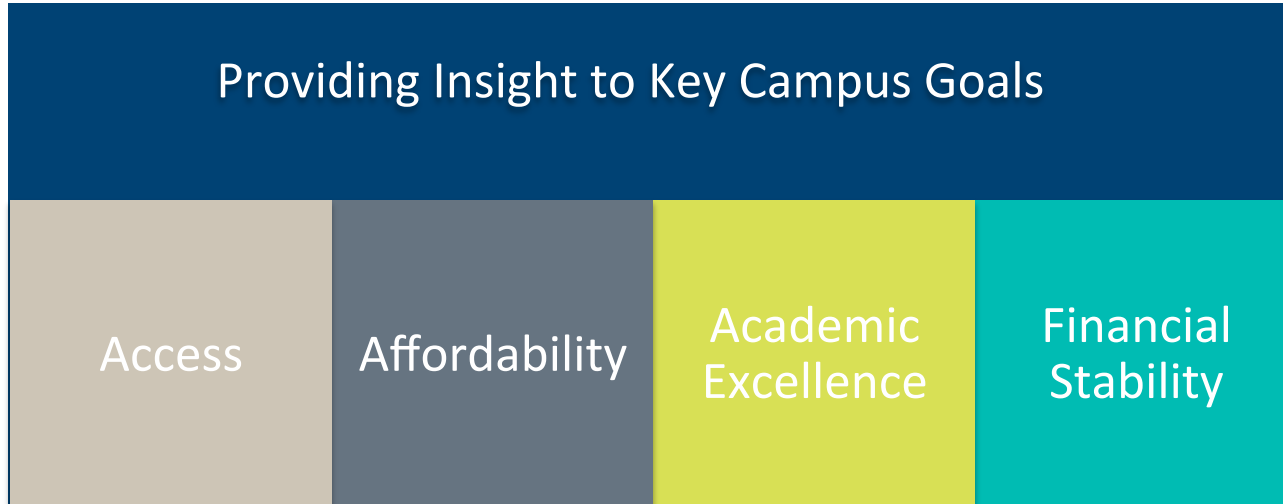
B: 9,571

C: 12,258

How does Student Financial reporting provide insights to help campus achieve its key goals?

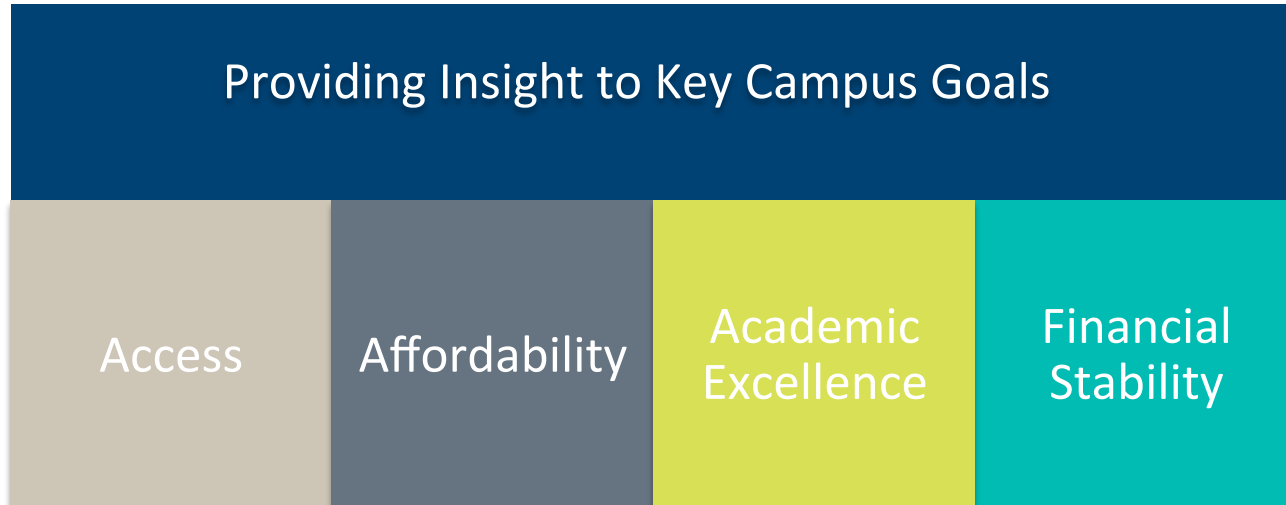


What are key questions Cal Answers can help answer about Access and Affordability?



How are students at all levels of financial need supported with Financial Aid? How much debt do they have to take on?

What are key questions Cal Answers can help answer about Academic Excellence?



What types of scholarship and fellowship programs does UC Berkeley offer to attract and retain high-achieving students?

What are key questions Cal Answers can help answer about Financial Stability?



How has the amount of student support from government and third party entities changed year-over-year?

How do I get involved with the Student Financials team? Your campus insights are valuable!

- Share your thoughts on the Student Financials Wiki:
<https://wikihub.berkeley.edu/display/calanswers/Student+Financials+Reporting>
- E-Mail Business Analyst Kelle Jacobs to take an active role on the project team :
kelle@berkeley.edu
 - focus groups to prepare for future releases
 - user acceptance testing
 - and more!
- Contact Cruz Grimaldo, Associate Director-FASO, for assistance with interpreting and presenting financial aid metrics to external parties: ma_cruz@berkeley.edu

How do I get started using Cal Answers? It's easy!

1. To learn more and log in to Cal Answers, visit calanswers.berkeley.edu.
2. Use the [Cal Answers Quick Start Guide](#) (on calanswers.berkeley.edu) for step-by-step instructions on beginning your analysis.
3. If you have questions or comments, e-mail calanswers-help@berkeley.edu or call 661-9000 (option 1).

Also on calanswers.berkeley.edu:

- ✓ Sign up to receive timely e-mail updates about data topics of interest to you!
- ✓ Look out for notifications of new data releases and presentations!