# IMPORTANT AND SOMETIMES OVERLOOKED ITEMS IN IPEDS

KRISTINA POWERS, DEBORAH LEE, LAJANIS ALLEN, AND ERIC ATCHISON MODERATED BY: EILEEN BRENNAN



# FOUR PRESENTERS SHARE THEIR EXPERTISE



Kristina Powers, PhD
Institute for Effectiveness
Registration Form



Deborah Lee, PhD
Concordia University,
Irvine

Fall Enrollment Survey



La Janis Allen

Douglas I Aveda Inst

Douglas J Aveda Institute | Douglas J School of Barbering

**Completions Survey** 



**Eric Atchison**Arkansas State University
System

Finance Survey

# IPEDS DATA COLLECTION COMPONENTS

#### Fall

- Institutional Characteristics
- Completions
- I2-Month Enrollment

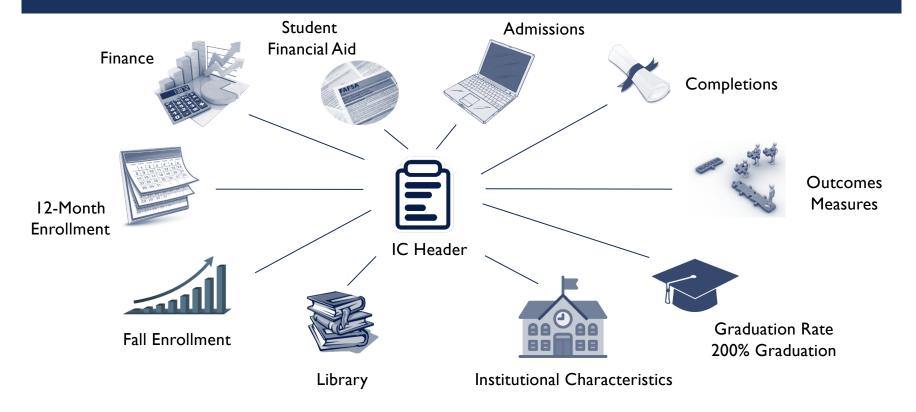
#### Winter

- Student Financial Aid
- Graduation Rates
- 200% Graduation Rates
- Admissions
- Outcome Measures

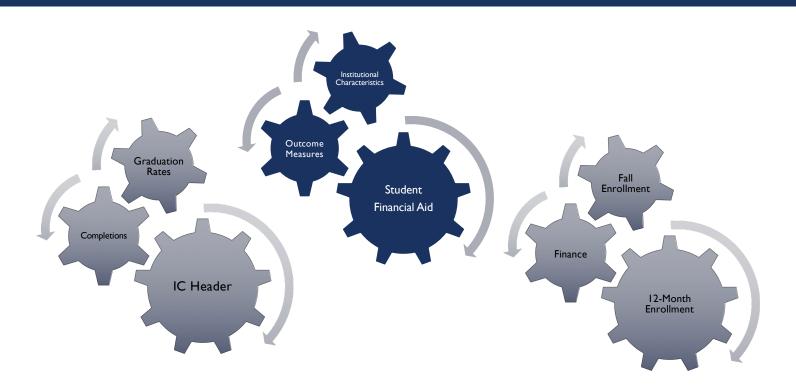
## Spring

- Fall Enrollment
- Finance
- Human Resources
- Academic Libraries

# RELATIONSHIP BETWEEN SURVEYS

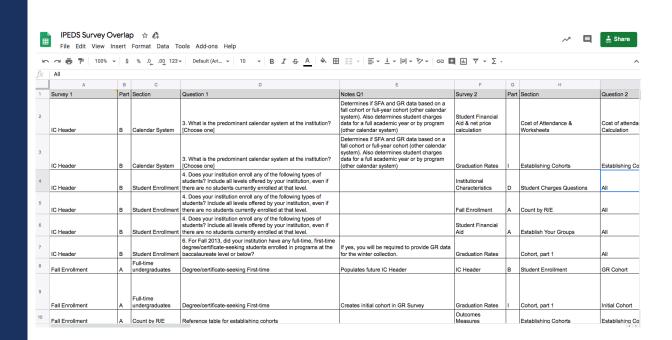


# INTERCONNECTED SURVEYS



# CONTRIBUTE YOUR EXPERTISE

- Do you know of some ways the IPEDS surveys overlap and are connected? Add to the conversation on our shared document after this web conference.
- We hope the four presentations spark some ideas for you to contribute.
- https://tinyurl.com/IPEDS Collab



# REGISTRATION FORM: STUDENT RIGHT TO KNOW (SRTK) ATHLETIC GRADUATION RATES

KRISTINA POWERS, PHD



# KRISTINA POWERS

- President Institute for Effectiveness in Higher Education
  - Data Analytic Tools
  - Consulting & Special Projects
  - Higher Ed Influencer
- IPEDS Educator for 10+ years
- IPEDS Keyholder ~15 years





# LET THE DATA FUN BEGIN -- HANDS ON EXERCISE



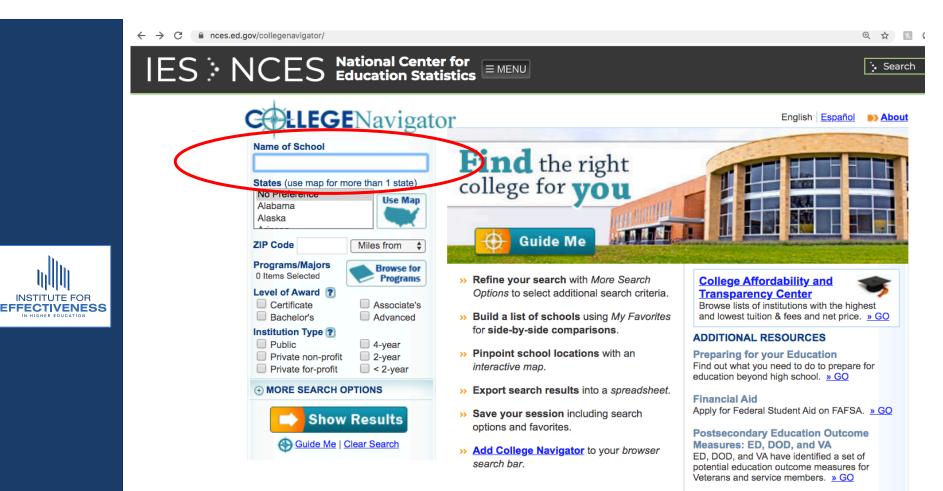


# HANDS ON EXERCISE

- Think of a few institutions that have athletic programs.
- Now narrow that to one or two institutions which are large enough to offer athletic scholarships.
- Go to one of our favorite websites...

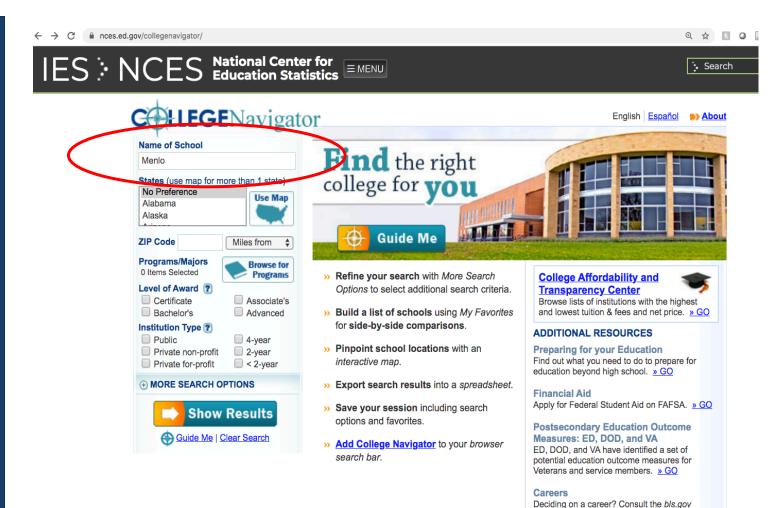






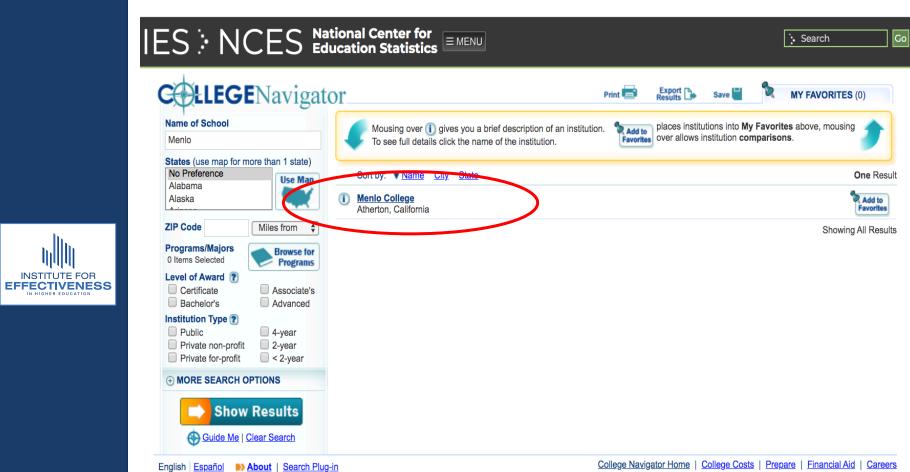
Careers

Deciding on a career? Consult the *bls.gov* Occupational Outlook Handbook. » GO



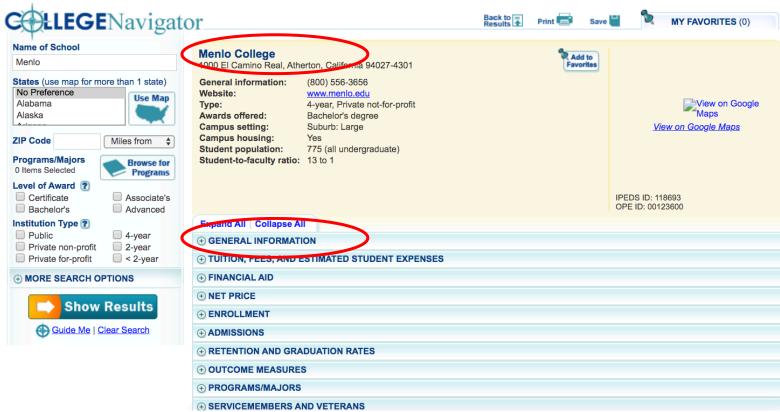
Occupational Outlook Handbook. » GO













1000 El Camino Real, Atherton, California 94027-4301

General information: (800) 556-3656 Website: www.menlo.edu

**Type:** 4-year, Private not-for-profit

Awards offered: Bachelor's degree Campus setting: Suburb: Large

Campus housing: Yes

**Student population:** 775 (all undergraduate)

Student-to-faculty ratio: 13 to 1





View on Google Maps

IPEDS ID: 118693 OPE ID: 00123600



#### GENERAL INFORMATION

Admissions www.menlo.edu/admissions/

Apply Online <u>menlo.secure.force.com/form?formid=217755&tfa\_3503=Web</u>

Financial Aid www.menlo.edu/admissions-financial-aid/financial-aid/

Net Price Calculator www.menlo.edu/NetPrice/npcalc.htm

Tuition Policies for Servicemembers and Veterans www.menlo.edu/academics/registrar/veteran-affairs

Athletic Graduation Rates

www.menlo.edu/academics/resources/
www.menloathletics.com/graduation-rates

#### Mission Statement

www.menlo.edu/about/menlo-college-mission-statement/





#### **⊝ GENERAL INFORMATION**

Admissions www.menlo.edu/admissions/

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Net Price Calculator <a href="https://www.menlo.edu/NetPrice/npcalc.htm">www.menlo.edu/NetPrice/npcalc.htm</a>

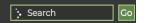
Tuition Policies for Servicemembers and Veterans www.menlo.edu/academics/registrar/veteran-affairs

Disability Services <u>www.menle.edu/academics/reseurces/</u>
Athletic Graduation Rates <u>www.menloathletics.com/graduation-rates</u>

#### **Mission Statement**

www.menlo.edu/about/menlo-college-mission-statement/







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return to your previous page

We have provided a link to this site because it has information that may be of interest to our users. NCES does not necessarily endorse the views expressed or the data and facts presented on this external site.





OFFICIAL SITE OF MENLO COLLEGE ATHLETICS

SPORTS ▼ INSIDE ATHLETICS ▼ GIVING GAMEDAY ▼ PHOTOS MENLO.EDU



Click here to view the Menlo College Student Right-to-Know Graduation Rate Report







#### Student Right-to-Know Disclosure

Disclosure of Graduation/Completion and Transfer-out Rates to Prospective Athletes, Parents, and Other Required Parties

#### Menlo College Student Right-to-Know Act Graduation Rate Report

In accordance with the Student Right-to-Know and Campus Security Act of 1990, Menlo College is pleased to share with you the following information on the graduation rates of our Fall 2012 cohort of full-time, first-time, degree or certificate seeking undergraduates.

As reported in the IPEDS graduation rates survey (GRS), during the Fall 2012 semester, 148 first-time, full-time, degree-seeking undergraduate students entered Menlo College. 59% of these students had graduated from Menlo College within 150% of the normal time to complete their degree (as of August 31, 2018). For additional information, please contact: Keith Spataro, Vice President of Enrollment and Athletics, at Keith. Spataro@Menlo.edu or 650-543-3853

Exhibit 1: Fall 2012 First-Time, Full-Time

Undergraduate Degree Seeking Graduation Rates					
Graduation / Completion Rate By G	ender				
Men	55%				
Women	65%				
Graduation / Completion Rate By Race of	r Ethnicity				
Non-resident alien	52%				
American Indian or Alaska Native	NA				
Asian	63%				
Black or African American	27%				
Hispanic/Latino	65%				
Native Hawaiian or Other Pacific Islander	100%				
White	67%				
Two or more races	17%				
Race and ethnicity unknown	60%				
Fraduation / Completion Rate By Financial	Aid Catego				
Pell Grant Recipient	52%				
FFEL or Direct Loan Recipient - Subsidized	71%				
Neither a Federal Pell Grant nor a FFEL or a Federal Direct Loan Recipient	57%				

N/A indicates that no students were in this category. Data were reported to IPEDS April 2019.

While reviewing this information, please keep the following in mind:

- All graduation rates are based on up to 6 years of attendance for bachelor's programs, which equates to 150% of the normal completion time.
- We have elected not to report transfer-out rates because our College's mission does not include providing substantial preparation for students to enroll in another eligible institution without completing or graduating.

# LET'S REWIND A BIT ...

# How does this information get posted?

- In the <u>Registration</u> -- IPEDS requests the website URL that provides the institution's student right to know data for <u>athletic</u> graduation rates.
- Keyholders can update registration information throughout the year.





#### ₩ IPEDS 2019-20 Data Collection System

IPEDS Help Desk (877) 225-2568 or <u>ipedshelp@rti.org</u>

NCES National Center for Education Statistics

User ID: P1186931

#### Menlo College (118693) (2)

	Surveys	Reports	Tools	Help	Log Out
Registration  • Please review the	e contact information displaye	ed below, <b>verify</b> your email	Go to Collection Lev Message Center Additional Users/Pa		cessary.
<ul> <li>Once you've compusers.</li> </ul>	<pre>pdate button to complete you pleted your registration, you v e indicated with asterisks (***</pre>	will be able to print blank fo	Enllowup Opt Out		d generate User IDs and passwords for additional
User ID Institution		. <del>86931</del> nlo College (118693)	Comparison Group Registration	Edit/Upload	

# SCROLL DOWN TO THE BOTTOM

Original Registration Date 8/21/2018
Current Registration Date 8/7/2019
Last Update Date 8/7/2019







### Menlo College (118693) (2)

	Surveys	Reports	Tools	Help	Log Out
Identification					
<ul> <li>Required fields are</li> </ul>	nformation on this page and come indicated with asterisks (**).  e sure to view the page instruction			r important informatio	n about your institution's web pag
General nfo	Web Addresses				
Institution Name		Menio College			
Suggested Name Cl					
Institution Name Al	ias	Menlo			
Physical Location		1000 El Camino Real			
City **		Atherton			
State **		California	<b>\$</b>		
ZIP Code**		94027 - 4301			
Mailing Address					
(if different than ph	ysical)				
City					
State			<b>*</b>		
ZIP Code		-			
General Information	n Telephone**	800 - 556 - 3656 Ext.			
Employer ID Numbe	er (EIN)**	Unless you are an uninco provide your institution's 9-digit Employer Identific			not pay wages to employe

ı	INSTITUTE FOR
ı	EFFECTIVENESS IN HIGHER EDUCATION

General Info	Web Addresses
Web Address	
http://	www.menlo.edu
Admissions Offi	ce Web Address
http://	www.menlo.edu/admissions/
Financial Aid Of	ffice Web Address
http://	www.menlo.edu/admissions-financial-aid/financial-aid/
Online Applicati	ion Web Address
https://	menlo.secure.force.com/form?formid=217755&tfa_3503=Web
Net Price Calcu	lator Web Address**
http://	www.menlo.edu/NetPrice/npcalc.htm
Does your insti	tution post tuition policies specifically related to Veterans and Military Service members on a website?**
Yes.	Please provide the URL.
	http://  www.menlo.edu/academics/registrar/veteran-affairs
○ No.	Please provide an explanation.
Does your insti	tution post the Student Right-to-Know student athlete graduation rates on a website?**
Yes.	Please provide the URL.
⊚ No.	http:// 💠 www.menloathletics.com/graduation-rates
,	ces Web Address**
http://	www.menlo.edu/academics/resources/
T d 101 11	Hardete States Hardeted



Does your institution post the Student Right-to-Know student athlete graduation rates on a website?  • Yes. Please provide the URL.	**
No. http:// ♦	

# WHAT IS REQUIRED UNDER STUDENT-RIGHT-TO-KNOW?

- Although many institutions are unaware of it, the federal government has required publication of athletic graduation rate data for decades under the Student-Right-to-Know Act (based on Federal Regulation 34 CFR 668).
- IPEDS used to collect the athletic data through 2006-07 Data Collection.









### **Archived Changes**



Changes to IPEDS Data Collections, 2007-08

The following changes have been approved by the Office of Management and Budget (OMB), to be effective with the 2007-08 IPEDS data collection. Most of these changes will be optional for 2007-08 IPEDS, and mandatory for 2008-09 IPEDS; see specific items for exceptions.

#### **Graduation Rates (Spring collection)**

▶ Eliminate Sections V and VI that collect data on students receiving athletically-related student aid. Institutions will no longer be required to report these data to IPEDS, but WILL still be required to disclose these data, as specified in the Student Assistance General Provision Regulations (34 CFR 668) implementing the Student Right-to-Know Act. An item for institutions to report the URL used for disclosure has been added.



# WHAT IS REQUIRED UNDER STUDENT-RIGHT-TO-KNOW?

- A number of data elements for the SRTK Athletic Disclosure Report comes from IPEDS, including:
  - ✓ Graduation/Completion Rates by gender, ethnicity, and financial aid categories (Pell grant recipient, FFEL or direct loan recipient, neither Pell grant nor FFEL or a Federal Direct Loan Recipient).

    [Graduation Rates Survey]
  - ✓ Most recent Fall enrollment by gender and ethnicity. [Fall Enrollment Survey]

# WHAT IS REQUIRED UNDER STUDENT-RIGHT-TO-KNOW?

If your institution is part of the NCAA, data may be able to be used for the SRTK disclosure. More information about NCAA Academic Performance Program Data Collection Guides is available at:

http://www.ncaa.org/about/resources/research/graduation-rates







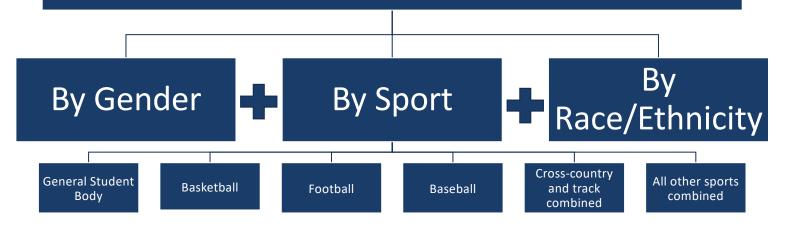
<u>Graduation Rates</u> of <u>All</u> First-Time, Full-Time Undergraduate, Degree-Seeking Students (as reported to IPEDS)

By Gender

By Race/ Ethnicity By Financial Aid Category



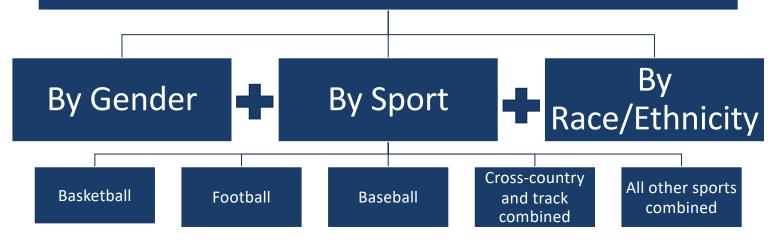










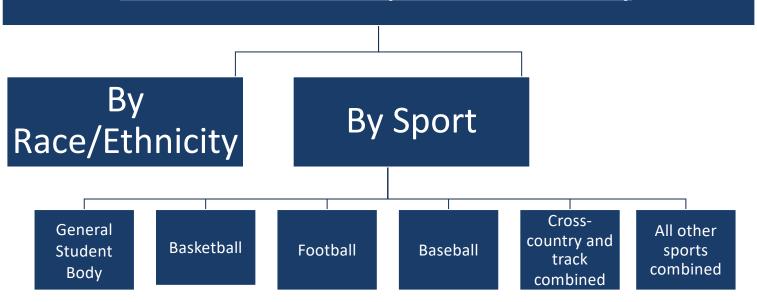






# Fall Enrollment by Race/Ethnicity





## Table I

# Fall 2012 First-Time, Full-Time Undergraduate Degree Seeking Graduation Rates

Graduation/Completion Rate by Gend	er
Men	%
Women	%
Graduation/Completion Rate by Race or Et	hnicity
Non-Resident Alien	%
American Indian or Alaska Native	%
Asian	%
Black or African American	%
Hispanic/Latino	%
Native Hawaiian or Other Pacific Islander	%
White	%
Two or More Races	%
Race or Ethnicity unknown	%
Graduation/Completion Rate by Financial Aid	Category
Pell Grant Recipient	%
FFEL or Direct Loan Recipient - Subsidized	%
Neither a Federal Pell Grant nor a FFEL, or a Federal Direct Loan Recipient	%



#### Four-Year Average Fall 2009 – Fall 2012 Cohort/Sub-Cohort Graduation Rates

Men	General Student Body Cohort	Basketball	Baseball	Cross- Country and Track	Football	All Other Sports Combined
Non-Resident Alien						
American Indian or Alaskan Native						
Asian						
Black or African American						
Hispanics of Any Race						
Native Hawaiian or Other Pacific Islander						
White, Non-Hispanic						
Two or more races						
Race / Ethnicity Unknown						
All Men						
	General			Cross-		All Other
Women	Student Body Cohort	Basketball	Baseball	Country and Track	Football	Sports Combined
Non-Resident Alien	Body	Basketball	Baseball		Football	Sports
	Body	Basketball	Baseball		Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian	Body	Basketball	Baseball		Football	Sports
Non-Resident Alien American Indian or Alaskan Native	Body	Basketball	Baseball		Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian Black or African American Hispanics of Any Race	Body	Basketball	Baseball		Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian Black or African American	Body	Basketball	Baseball		Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian Black or African American Hispanics of Any Race	Body	Basketball	Baseball		Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian Black or African American Hispanics of Any Race Native Hawaiian or Other Pacific Islander	Body	Basketball	Baseball		Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian Black or African American Hispanics of Any Race Native Hawaiian or Other Pacific Islander White, Non-Hispanic	Body	Basketball	Baseball		Football	Sports

## Table 2

#### Single-Year Fall 2012 Cohort/Sub-Cohort Graduation Rates

Men	General Student Body Cohort	Basketball	Baseball	Cross- Country and Track	Football	All Other Sports Combined
Non-Resident Alien						
American Indian or Alaskan Native						
Asian						
Black or African American						
Hispanics of Any Race						
Native Hawaiian or Other Pacific Islander						
White, Non-Hispanic						
Two or more races						
Race / Ethnicity Unknown						
All Men						
	General			Cross-		All Other
Women	Student Body Cohort	Basketball	Baseball	Country and Track	Football	Sports Combined
Women Non-Resident Alien	Body	Basketball	Baseball	Country	Football	Sports
	Body	Basketball	Baseball	Country	Football	Sports
Non-Resident Alien	Body	Basketball	Baseball	Country	Football	Sports
Non-Resident Alien American Indian or Alaskan Native	Body	Basketball	Baseball	Country	Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian	Body	Basketball	Baseball	Country	Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian Black or African American	Body	Basketball	Baseball	Country	Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian Black or African American Hispanics of Any Race	Body	Basketball	Baseball	Country	Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian Black or African American Hispanics of Any Race Native Hawaiian or Other Pacific Islander	Body	Basketball	Baseball	Country	Football	Sports
Non-Resident Alien American Indian or Alaskan Native Asian Black or African American Hispanics of Any Race Native Hawaiian or Other Pacific Islander White, Non-Hispanic	Body	Basketball	Baseball	Country	Football	Sports

## Table 4

#### Fall Enrollment 2018

	General					i
Race/Ethnicity or Gender	Student Body Cohort	Basketball	Baseball	Cross- Country and Track	Football	All Other Sports Combined
Non-Resident Alien						
American Indian or Alaskan Native						
Asian						
Black or African American						
Hispanics of Any Race						
Native Hawaiian or Other Pacific Islander						
White, Non-Hispanic						
Two or more races						
Race / Ethnicity Unknown						
All Men						

# WHAT IS REQUIRED UNDER STUDENT-RIGHT-TO-KNOW?

#### Other Items:

- Context: Be sure to include the necessary wording that describes the report, along with allowable exclusions (noted in the regulation, similar to IPEDS).
- Small cell sizes and protecting personally identifying information (PII).
  - IES put out a technical brief on this topic <a href="https://nces.ed.gov/pubs2012/2012151.pdf">https://nces.ed.gov/pubs2012/2012151.pdf</a>
- Point of contact for questions to be listed and their contact information.
- Needs to be publicly posted by July 1, each year.



## SAMPLE SRTK DISCLOSURE REPORT

- A good example of a complete Student-Right-to-Know Act Graduation Rate Report is shown here and offered publicly by Menlo College.
- Three pages long
- The federal government does not prescribe a format.
- This format is commonly used by multiple institutions.



Menlo College

Menlo College Studies In accordance with the Student Bight to

Student Right-to-Know Disclosure
Disclosure of Graduation/Completion and Transfer-out Rates

to Prospective Athletes, Parents, and Other Required Pa

#### Menlo College Student Right-to-Know Act Graduation Rate Report

In accordance with the Student Right-to-Know and Campus Security Act of 1990, Menlo College is pleased to share with you the following information on the graduation rates of our Fall 2012 cohort of full-time, first-time, degree or oetificate seeking undergraduates.

As reported in the IPEDS graduation rates survey (GRS), during the Fall 2012 semester, 148 first-time, full-time, degree-seeking undergraduate students entered Menlo College, 50% of these students had graduated from Menlo College within 150% of the normal time to complete their degree (as of August 31, 2018) or additional information, please contact Keith Spataro, Vice President of Enrollment and Athletics, at Keith Spataro(Memlo edu).

Exhibit 1: Fall 2012 First-Time, Full-Time

Undergraduate Degree Seeking Graduati	
Graduation / Completion Rate By G	
Men	55%
Women	65%
Graduation / Completion Rate By Race o	r Ethnicity
Non-resident alien	52%
American Indian or Alaska Native	NA
Asian	63%
Black or African American	27%
Hispanic/Latino	65%
Native Hawaiian or Other Pacific Islander	100%
White	67%
Two or more races	17%
Race and ethnicity unknown	60%
Graduation / Completion Rate By Financial	Aid Catego
Pell Grant Recipient	52%
FFEL or Direct Loan Recipient - Subsidized	71%
Neither a Federal Pell Grant nor a FFEL or a	57%
Federal Direct Loan Recipient	21.12
N/A indicates that no students were in this category. Date w	ere reported to

i Indicates that no students were in this category. Data were re, IPSDS April 2019.

While reviewing this information, please keep the following in mind:

- All graduation rates are based on up to 8 years of attendance for bachelor's programs, which equate
  to 150% of the normal completion time.
- We have elected not to report transfer-out rates because our College's mission does not include providing substantial preparation for students to enroll in another eligible institution without completing or graduating.
- These charts do not identify the reasons why our students withdrew; therefore, students who withdre
  for personal or medical reasons are included.
- Graduation rates do not include students who left school to serve in the U.S. Armed Forces, on official
  church missions, or with a foreign aid service of the federal government, or students who died or were
  totally and permanently disabled.

www.menloathletics.com/graduation-rates

### **QUESTIONS & COMMENTS FOR CONSIDERATION**

- Did your sample institution meet the SRTK for athletic graduation rates requirements?
  - Link?
  - Provide athletic graduation rates?
  - Was all of the information included in the report?
- Share with colleagues, other IPEDS keyholders and contributors
- The SRTK link is on each institution's College Navigator website.

# **FALL ENROLLMENT**

DEBORAH LEE



## **DEBORAH LEE**

- Director of Institutional Research and Assessment at Concordia Irvine
  - Internal & External Data Requests
  - Assessment
  - Regional & Specialized Accreditation
  - IRB
  - Adjunct Professor
- IPEDS Educator for ~I year
- IPEDS Keyholder 9 years





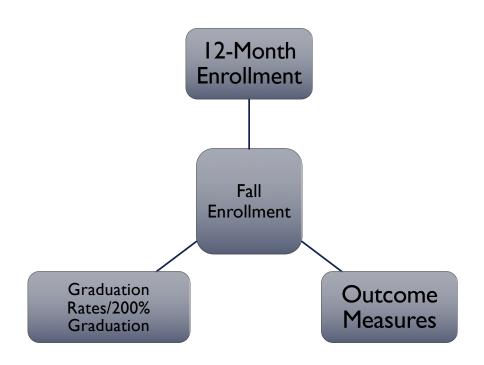
### **OVERVIEW**

- Fall Enrollment collects enrollment counts:
  - Level of student
  - Enrollment status
  - Gender
  - Race/Ethnicity
- Traditional Academic Year Calendar
  - Report institution's official fall reporting date or October 15<sup>th</sup>
- Non-traditional Academic Calendar
  - Report Fall enrollment as students enrolled anytime during the period from August 1st through October 31st





#### RELATIONSHIP WITH OTHER SURVEYS



- 12-Month unduplicated count may be different than expected when compared to the PY Fall Enrollment.
- Graduation Rate adjusted cohort may be outside the expected range
- Outcome Measures adjusted cohort may be outside the expected range.



#### Error Description

The calculated value for this adjusted cohort (131) is outside the expected range of between 161 and 481 when compared to your prior year reported data. Please correct your subcohort data or provide an explanation for the reported data. (Error #13601)

#### Resolution

- Review and correct the subcohort data; OR
- Review and correct the prior year data; OR
- Provide an explanation for the reported data.



Outcomes Measures



#### Error Description

The total number of students (men + women) in the revised cohort is outside the expected range based on the initial cohort. Please correct your data or contact the IPEDS Help Desk for assistance. (Error #4109)



#### Resolution

- Review and correct the data; OR
- Contact IPEDS Help Desk for an override.

Graduation Rate 200% Graduation



#### Error Description

The 12-month unduplicated count of undergraduate students for American Indian or Alaska Native Women (3) is different than expected when compared with the same category (4) in the prior year Fall Enrollment survey, because the official fall enrollment reporting date falls within the 12-month timeframe for E12. Please correct your data or explain. (Error #9357)

#### Resolution

- Review and correct the data; OR
- Provide an explanation for the reported data.



12-Month Enrollment



- Review current year data
- Correct prior year data using the Prior Year Data Revision System
- Provide explanation
- Contact IPEDS Help Desk < <a> </a>
  - Make a change to a survey submitted this cycle
  - Override a fatal error



# **COMPLETIONS**

LAJANIS ALLEN



# LAJANIS ALLEN

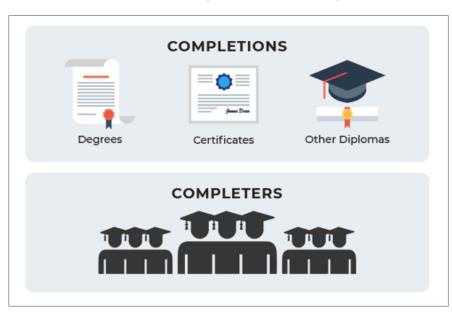
- Director of Compliance and Student Services
- 25 years in for-profit, higher education industry
- 5+ years IPEDS keyholder



Douglas Douglas Douglas Darger No.

#### **OVERVIEW**

 Number of students who complete a postsecondary education program (completers) and the number of postsecondary awards earned (completions)



#### Data include:

- Completions by field of study, award level, recipient race/ethnicity and gender;
- Completers by race/ethnicity, gender, and age (collected at the total as well as by award level); and
- Whether programs are offered via distance education.

### RELATIONSHIP WITH OTHER SURVEYS



# Don't get comfortable when completing surveys because of last year's survey success!

- Read the instructions before completing the survey. For example, in the Completions survey this year, the following changes were made:
  - Certificates of less than one academic year in length
  - Change to distance education question
  - Terminology for "formal award" and "contact hour"
  - Exclusion of students receiving Experimental Pell



Durglar Durglar (

#### Validate the data!

Parglar Durglar Control Parglar Control Pargla Control Parglar Control Parglar Control Parglar Control Parglar

- Are the institutional characteristics correct?
  - Data from the Completers survey is based on the institutional characteristics.
  - Incorrect program information leads to incorrect completers information.
  - Are there any new programs which should have been added to the institutional characteristics survey? Should there have been changes?
- Validate the data!
  - Count students once regardless of how many awards were earned.
  - Social security numbers don't change; student IDs may change. Which one can you use for validation?
  - Don't rely 100% on outside company to compile your data or complete your survey!

#### **Resolve errors!**

- Are the institutional characteristics correct?
- What
  - This error requires explanation or confirmation.
  - Check your data and data entry for possible errors.

Darglar Dargla

#### **Resolve errors!**

- **②** The error of doom ... or is it?
  - Fatal error which requires a call to the Help Desk
  - But first!
    - o Check for data entry errors.
    - o Ensure data are compiled correctly. Example: Does the cohort only include full-time/first-time students which skews the number of students?
    - o Don't assume that one set of data is good for other surveys.
    - o Read the instructions.

Douglas )

Dorglar School of BARBERING

# **FINANCE**

**ERIC ATCHISON** 

# **ERIC ATCHISON**

- Vice President for Strategic Research
- IPEDS System Coordinator & Keyholder
- Helping people understand data use





### **OVERVIEW**

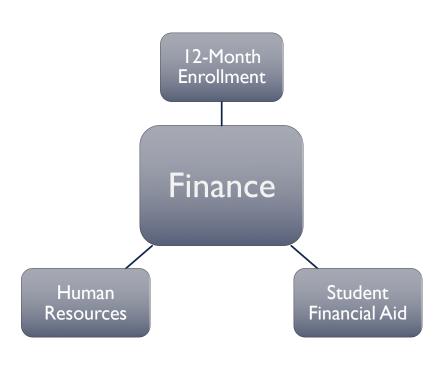
#### Finance collects

- Revenues by source (e.g., tuition & fees, auxiliary, state/federal grants)
- Expenses by function (e.g., instruction, research, public service) or by the nature of the expense (e.g., salaries & wages, fringe benefits)
- Unfunded pension information (for GASB-reporting institutions)
- Endowment assets
- Parent / child relationships

#### Institution's Fiscal Year

- Ending on or before October 31st
- Data are collected based on accounting standards for institutional business practices
  - Not all public institutions report using GASB

### **RELATIONSHIP WITH OTHER SURVEYS**



- Commonly used to contextualize expenditures or revenues per:
  - 12-month FTE student enrollment
  - FTE faculty, management, other staff categories
- Provide additional information with SFA regarding scholarships and fellowship revenues.

#### General:

- Many values reported are expected to be within 50% of the prior year.
- If the Prior year amount reported is greater than 0, then the current year value may NOT be equal to that amount.

#### Scholarships & Fellowships:

- If your institution is NOT an administrative office, then the value reported for Pell grants is expected to be greater than 0.
- A value is expected to be entered for Grants by state government (GASB).

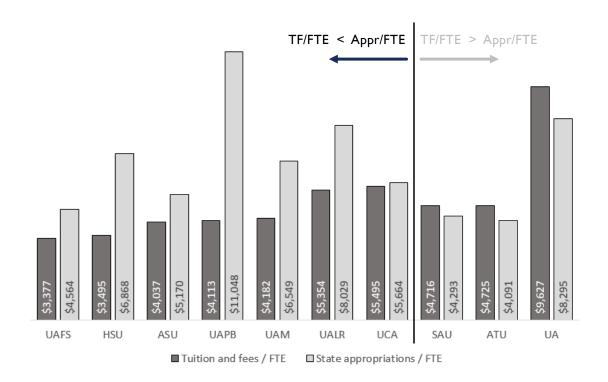
#### Nonoperating Revenues:

- The value reported for Federal nonoperating grants is expected to be greater than or equal to the amount reported for Pell grants in Schol. & Fell.
- 12-month Student FTE from the current year 12-month Enrollment survey is displayed after saving to calculate the Total operating and nonoperating revenues per student FTE

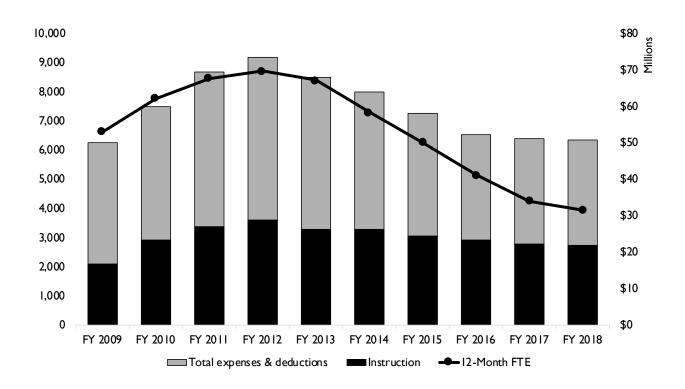
### DATA USE CONSIDERATIONS

- Comparisons with other institutions
- Examining trends
- Parent / child relationships

## DATA USE CONSIDERATIONS – COMPARING INSTITUTIONS



# DATA USE CONSIDERATIONS – TREND ANALYSIS



### DATA USE CONSIDERATIONS – PARENT/CHILD RELATIONSHIPS

				,								Total revenues
			Parent/child			Federal	State grants	Private gifts				and
	Parent/child	of parent	allocation	State	Tuition and	grants and	and	grants and	Investment	Hospital	Other	investment
UnitID Institution	indicator*	nstitution	factor	appropriations	fees	contracts	contracts	contracts	return	revenue	revenue	return
214777 Pennsylvania State University-Main Campus	1	214777	80.48	\$275,842,000	\$1,729,046,000	\$468,633,000	\$110,820,000	\$395,912,000	\$361,426,000	\$2,276,366,000	\$419,434,000	\$6,655,061,000
214616 Pennsylvania State University-College of Medicine	2	214777	5.35									
212018 Pennsylvania State University-Dickinson Law	2	214777	0.42									
214801 Pennsylvania State University-Penn State Abington	2	214777	1.1									
214689 Pennsylvania State University-Penn State Altoona	2	214777	1.21									
214698 Pennsylvania State University-Penn State Beaver	2	214777	0.28									
214704 Pennsylvania State University-Penn State Berks	2	214777	0.92									
214731 Pennsylvania State University-Penn State Brandywine	2	214777	0.45									
214740 Pennsylvania State University-Penn State DuBois	2	214777	0.23									
214591 Pennsylvania State University-Penn State Erie-Behrend Co	lege 2	214777	1.84									
214759 Pennsylvania State University-Penn State Fayette- Eberly	2	214777	0.25									
214607 Pennsylvania State University-Penn State Great Valley	2	214777	0.25									
214786 Pennsylvania State University-Penn State Greater Allegher	y 2	214777	0.3									
214713 Pennsylvania State University-Penn State Harrisburg	2	214777	1.71									
214768 Pennsylvania State University-Penn State Hazleton	2	214777	0.34									
214670 Pennsylvania State University-Penn State Lehigh Valley	2	214777	0.3									
214795 Pennsylvania State University-Penn State Mont Alto	2	214777	0.34									
214625 Pennsylvania State University-Penn State New Kensington	2	214777	0.25									
214810 Pennsylvania State University-Penn State Schuylkill	2	214777	0.27									
214652 Pennsylvania State University-Penn State Scranton	2	214777	0.31									
214634 Pennsylvania State University-Penn State Shenango	2	214777	0.18									
214643 Pennsylvania State University-Penn State Wilkes-Barre	2	214777	0.2									
214829 Pennsylvania State University-Penn State York	2	214777	0.32									
479956 Pennsylvania State University-World Campus	2	214777	2.7									

<sup>\* 1 =</sup> Parent record - includes data from branch campuses; 2 = Child record - data reported with parent campus

### DATA USE CONSIDERATIONS – PARENT/CHILD RELATIONSHIPS

												Total revenues
		ID number	Parent/child			Federal	State grants	Private gifts				and
	Parent/child	of parent	allocation	State	Tuition and	grants and	and	grants and	Investment	Hospital	Other	investment
UnitID Institution	indicator*	institution	factor	appropriations	fees	contracts	contracts	contracts	return	revenue	revenue	return
214777 Pennsylvania State University-Main Campus	1	214777	TOTAL	\$275,842,000	\$1,729,046,000	\$468,633,000	\$110,820,000	\$395,912,000	\$361,426,000	\$2,276,366,000	\$419,434,000	\$6,655,061,000
214777 Pennsylvania State University-Main Campus	1	214777	80.48	\$221,997,642	\$1,391,536,221	\$377,155,838	\$89,187,936	\$318,629,978	\$290,875,645	\$1,832,019,357	\$337,560,483	\$5,355,993,093
214616 Pennsylvania State University-College of Medicine	2	214777	5.35	\$14,757,547	\$92,503,961	\$25,071,866	\$5,928,870	\$21,181,292	\$19,336,291	\$121,785,581	\$22,439,719	\$356,045,764
212018 Pennsylvania State University-Dickinson Law	2	214777	0.42	\$1,158,536	\$7,261,993	\$1,968,259	\$465,444	\$1,662,830	\$1,517,989	\$9,560,737	\$1,761,623	\$27,951,256
214801 Pennsylvania State University-Penn State Abington	2	214777	1.1	\$3,034,262	\$19,019,506	\$5,154,963	\$1,219,020	\$4,355,032	\$3,975,686	\$25,040,026	\$4,613,774	\$73,205,671
214689 Pennsylvania State University-Penn State Altoona	2	214777	1.21	\$3,337,688	\$20,921,457	\$5,670,459	\$1,340,922	\$4,790,535	\$4,373,255	\$27,544,029	\$5,075,151	\$80,526,238
214698 Pennsylvania State University-Penn State Beaver	2	214777	0.28	\$772,358	\$4,841,329	\$1,312,172	\$310,296	\$1,108,554	\$1,011,993	\$6,373,825	\$1,174,415	\$18,634,171
214704 Pennsylvania State University-Penn State Berks	2	214777	0.92	\$2,537,746	\$15,907,223	\$4,311,424	\$1,019,544	\$3,642,390	\$3,325,119	\$20,942,567	\$3,858,793	\$61,226,561
214731 Pennsylvania State University-Penn State Brandywine	2	214777	0.45	\$1,241,289	\$7,780,707	\$2,108,849	\$498,690	\$1,781,604	\$1,626,417	\$10,243,647	\$1,887,453	\$29,947,775
214740 Pennsylvania State University-Penn State DuBois	2	214777	0.23	\$634,437	\$3,976,806	\$1,077,856	\$254,886	\$910,598	\$831,280	\$5,235,642	\$964,698	\$15,306,640
214591 Pennsylvania State University-Penn State Erie-Behrend College	2	214777	1.84	\$5,075,493	\$31,814,446	\$8,622,847	\$2,039,088	\$7,284,781	\$6,650,238	\$41,885,134	\$7,717,586	\$122,453,122
214759 Pennsylvania State University-Penn State Fayette- Eberly	2	214777	0.25	\$689,605	\$4,322,615	\$1,171,583	\$277,050	\$989,780	\$903,565	\$5,690,915	\$1,048,585	\$16,637,653
214607 Pennsylvania State University-Penn State Great Valley	2	214777	0.25	\$689,605	\$4,322,615	\$1,171,583	\$277,050	\$989,780	\$903,565	\$5,690,915	\$1,048,585	\$16,637,653
214786 Pennsylvania State University-Penn State Greater Allegheny	2	214777	0.3	\$827,526	\$5,187,138	\$1,405,899	\$332,460	\$1,187,736	\$1,084,278	\$6,829,098	\$1,258,302	\$19,965,183
214713 Pennsylvania State University-Penn State Harrisburg	2	214777	1.71	\$4,716,898	\$29,566,687	\$8,013,624	\$1,895,022	\$6,770,095	\$6,180,385	\$38,925,859	\$7,172,321	\$113,801,543
214768 Pennsylvania State University-Penn State Hazleton	2	214777	0.34	\$937,863	\$5,878,756	\$1,593,352	\$376,788	\$1,346,101	\$1,228,848	\$7,739,644	\$1,426,076	\$22,627,207
214670 Pennsylvania State University-Penn State Lehigh Valley	2	214777	0.3	\$827,526	\$5,187,138	\$1,405,899	\$332,460	\$1,187,736	\$1,084,278	\$6,829,098	\$1,258,302	\$19,965,183
214795 Pennsylvania State University-Penn State Mont Alto	2	214777	0.34	\$937,863	\$5,878,756	\$1,593,352	\$376,788	\$1,346,101	\$1,228,848	\$7,739,644	\$1,426,076	\$22,627,207
214625 Pennsylvania State University-Penn State New Kensington	2	214777	0.25	\$689,605	\$4,322,615	\$1,171,583	\$277,050	\$989,780	\$903,565	\$5,690,915	\$1,048,585	\$16,637,653
214810 Pennsylvania State University-Penn State Schuylkill	2	214777	0.27	\$744,773	\$4,668,424	\$1,265,309	\$299,214	\$1,068,962	\$975,850	\$6,146,188	\$1,132,472	\$17,968,665
214652 Pennsylvania State University-Penn State Scranton	2	214777	0.31	\$855,110	\$5,360,043	\$1,452,762	\$343,542	\$1,227,327	\$1,120,421	\$7,056,735	\$1,300,245	\$20,630,689
214634 Pennsylvania State University-Penn State Shenango	2	214777	0.18	\$496,516	\$3,112,283	\$843,539	\$199,476	\$712,642	\$650,567	\$4,097,459	\$754,981	\$11,979,110
214643 Pennsylvania State University-Penn State Wilkes-Barre	2	214777	0.2	\$551,684	\$3,458,092	\$937,266	\$221,640	\$791,824	\$722,852	\$4,552,732	\$838,868	\$13,310,122
214829 Pennsylvania State University-Penn State York	2	214777	0.32	\$882,694	\$5,532,947	\$1,499,626	\$354,624	\$1,266,918	\$1,156,563	\$7,284,371	\$1,342,189	\$21,296,195
479956 Pennsylvania State University-World Campus	2	214777	2.7	\$7,447,734	\$46,684,242	\$12,653,091	\$2,992,140	\$10,689,624	\$9,758,502	\$61,461,882	\$11,324,718	\$179,686,647

<sup>\* 1 =</sup> Parent record - includes data from branch campuses; 2 = Child record - data reported with parent campus

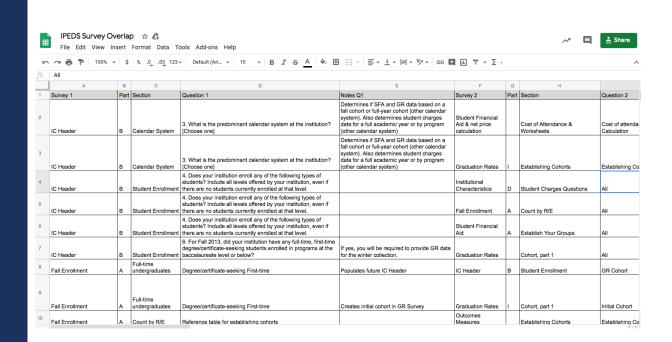
### LOOKING AHEAD

- FY 2020 data reporting changes including:
  - New screening questions to determine where/whether institutions will report intercollegiate athletics revenues.
  - Sources of discounts and allowances and where the amount is applied (e.g., tuition & fees)
  - Items explaining the change to the institution's endowment (e.g., new additions, net investment return)
  - Items regarding financial health

# **WRAP-UP**

# CONTRIBUTE YOUR EXPERTISE

- Do you know of some ways the IPEDS surveys overlap and are connected? Add to the conversation on our shared document after this web conference.
- We hope the four presentations spark some ideas for you to contribute.
- https://tinyurl.com/IPEDS Collab



# **QUESTIONS**

### FOUR PRESENTERS SHARE THEIR EXPERTISE



Kristina Powers, PhD
Institute for Effectiveness
Registration Form



Deborah Lee, PhD
Concordia University,
Irvine

Fall Enrollment Survey



Douglas J Aveda Institute | Douglas J School of Barbering

**Completions Survey** 



Eric Atchison
Arkansas State University
System

Finance Survey