

# Making the Move to Modernize Your Reporting Process

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# Problems with *Legacy Reporting*

- Reports are immutable
- Unfriendly format
- Aging
- Out of your control

# Advantages of *Modern Reporting*

- Flexible
- Friendly Format
- Up-to-date
- In your control
- Clearly documented

# Statistical Summary of Students and Staff

<http://www.ucop.edu/institutional-research-academic-planning/content-analysis/employees/personnel-stat-summary-reports.html>

## UNIVERSITY OF CALIFORNIA

### FULL-TIME EQUIVALENTS SMG & MSP, ACADEMIC AND PSS PERSONNEL APRIL 2016

	<u>CTO*</u> <u>OSC</u>	<u>TOTAL</u> <u>UNIVERSITY</u>
SMG & MSP		11,378.89
ACADEMIC STAFF		
ACADEMIC ADMINISTRATORS	S	819.73
REGULAR TEACHING FACULTY-LADDER RANKS	0	9,098.93
REGULAR TEACHING FACULTY-ACTING RANKS	1	45.12
LECTURERS	2	2,384.21
OTHER TEACHING FACULTY	3	6,402.44
STUDENT ASSISTANTS	4	14,861.02
RESEARCH	5	9,669.87
LIBRARIAN	6	454.67
COOPERATIVE EXTENSION	7	264.46
UNIVERSITY EXTENSION	8	214.21
OTHER ACADEMIC PERSONNEL	9	291.18
OTHER-UNKNOWN		.74

# Process

- Meet with key people to design specs
  - Variables in data vs. derived variables
- Start to pull data
- Create derived variables
- Format into report
- Send to stakeholders for input and validation
- Refine
- Publish

# Tools I Use

- SQL
  - Queries usually developed in DBVisualizer
- Tableau
  - Direct connection to data warehouse
  - Calculated fields
- Tableau Server
  - For sharing visualizations

# UC Employees Dashboard

<https://www.universityofcalifornia.edu/infocenter/employee-fte>

## UC Employees, Full-Time Equivalent (FTE)

Changes in staffing levels at UC reflect growth in enrollment, research activity and health science services have been accompanied by a long term-trend toward increased professionalization of the workforce. Between 2007-08 and 2015-16, enrollment grew by 15%, research expenditures (through 2014-15) grew by an inflation-adjusted 9% and medical center expenditures (through 2014-15) grew by an inflation-adjusted 46%. Additional information on staffing trends at UC can be found in the Topic Brief "Employee Trends at UC: Focus on Staff" [http://www.ucop.edu/institutional-research-academic-planning/files/employee\\_trends\\_at\\_UC.pdf](http://www.ucop.edu/institutional-research-academic-planning/files/employee_trends_at_UC.pdf)

Service Focus		Funding Source		Career Status		Location				
(All)		(All)		(All)		(All)				
		OCT2007	OCT2008	OCT2009	OCT2010	OCT2011	OCT2012	OCT2013	OCT2014	OCT2015
<b>Academic Personnel</b>	Academics	39,219.9	40,094.5	40,620.3	41,726.1	41,669.9	41,986.2	42,425.4	43,177.5	44,489.1
	<b>Total</b>	39,219.9	40,094.5	40,620.3	41,726.1	41,669.9	41,986.2	42,425.4	43,177.5	44,489.1
<b>Non-Academic Personnel</b>	Senior Management Group (SMG)	284.1	292.8	290.1	196.2	192.6	183.7	173.7	171.8	170.2
	Managers (M)	4,260.9	4,427.7	4,451.4	4,573.5	4,755.6	5,033.3	4,956.3	5,441.7	5,679.2
	Senior Professionals (SP)	3,290.0	3,519.7	3,735.5	3,832.5	4,018.0	4,251.3	4,734.9	4,728.8	5,103.0

# Questions

