

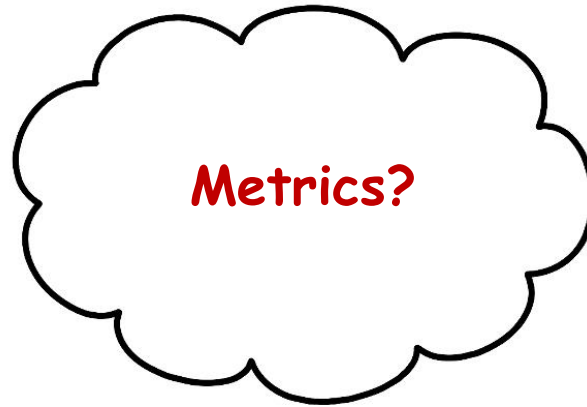
Stanford University Student Financial Services

Operational Metrics: Immediate, Accessible, Easy

2013 PacWest SFS Conference

**William Clark
Larry Ibarra**

Why metrics are important: Stanford's view point



blog.janicehardy.com

Stanford University

Immediate Metrics Matters:

Capitalizing on opportunities in real time.



Evolution of Technology



Evolution of Technology



Evolution of Technology



Visibility to take immediate action

Students making tuition payments



Where is everyone?



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Excel using formulas

	Sep-09	Oct-09	Nov-09	Q1 Sept - Nov '09 Totals	Q1 Sept - Nov. '09 %
1098-T/Canadian form	26	20	7	53	0%
Cash advance/emergency loan	35	11	9	55	0%
Cashier's Office	59	64	23	146	1%
Collections	4	3	4	11	0%
CHSF Exemption	49	26	18	93	0%
Holds	228	227	182	637	3%
Late fees	135	221	152	508	3%
Payroll Deduction	123	156	84	363	2%
Payroll-Fed Tax WH	16	115	6	137	1%
Refunds	512	358	119	989	5%
Stanford Card Plan	150	135	71	356	2%
Stanford ePay	312	254	155	721	4%
Stanford Payment Plan	31	62	57	150	1%
Student loans	95	17	26	138	1%
Third party contracts	38	38	13	89	0%
University Bill	1748	986	440	3174	16%
Total for SFS	3561	2693	1366	7620	38%

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Dashboard from Database

Full List
by Source

(iQueue, Helpsu, and Call Center)

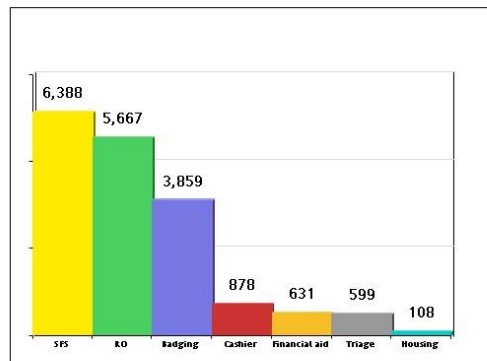
Student

Top Inquiry Driver by Category

Display Period	Sep-2011	Oct-2011	Nov-2011	Total
ID BADGING	2,852	626	381	3,859
EXPLANATION OF CHARGES	1,471	821	715	3,007
ENROLLMENT	501	429	361	1,291
TRANSCRIPTS	368	438	484	1,290
CASH/CHECK PAYMENT	299	278	146	723
REFUND	202	345	162	709
CERTIFICATIONS	286	241	168	695
FINANCIAL AID	249	169	109	527
LATE FEE	129	189	114	432
DEGREE PROGRESS GR	196	115	82	393
PO BOXES	278	76	19	373

Top Inquiry Driver by Department

	Sep-2011	Oct-2011	Nov-2011	Total
SSC Cashier	346	350	182	878
SSC Financial Aid/Student Loan	305	203	123	631
SSC Housing/R&DE	63	34	11	108
SSC ID Badging	2,852	626	381	3,859
SSC Registrar	2,299	1,778	1,590	5,667
SSC SFS	2,716	2,129	1,543	6,388
SSC Triage/Other	235	208	156	599
Total	8,816	5,328	3,986	18,130



Student Service Metrics for

Sep-2011 Nov-2011

Top Inquiry Driver by Type

	askJane	% For Month	iQueue	% For Month	Call Center	% For Month	HelpSU	% Per Month	Total	% of Period
Sep-2011	3,078	26%	5,237	44%	1,984	17%	1,595	13%	11,894	48%
Oct-2011	1,925	27%	2,827	39%	1,294	18%	1,207	17%	7,253	29%
Nov-2011	1,782	31%	2,138	37%	1,185	21%	663	11%	5,768	23%
	6,785	27%	10,202	41%	4,463	18%	3,465	14%	24,915	

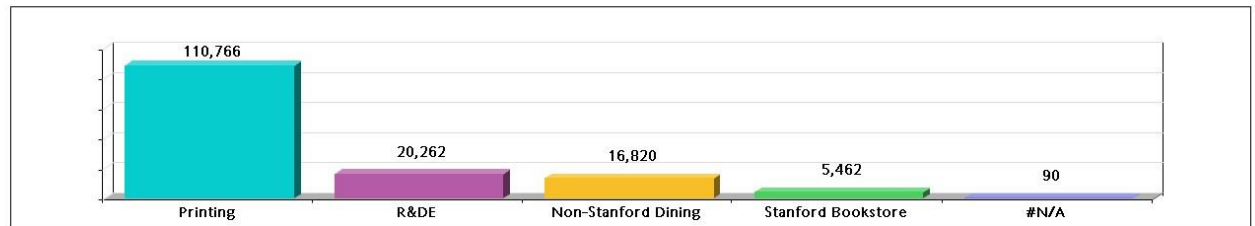
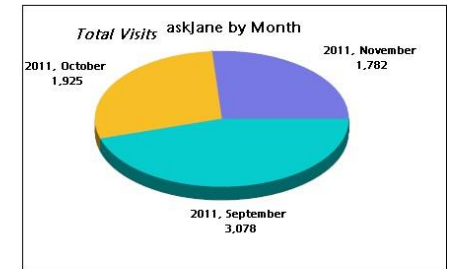
StanfordCardPlan Activity

Full List

	Sep-2011		Oct-2011		Nov-2011		Total	
Stanford Bookstore	\$210,285	37%	\$67,732	12%	\$32,789	6%	\$310,807	55%
Residential Printers	\$3,844	1%	\$18,847	3%	\$14,737	3%	\$37,428	7%
CoHo (Coffee House)	\$6,070	1%	\$13,685	2%	\$13,877	2%	\$33,631	6%
Treehouse	\$5,138	1%	\$11,285	2%	\$10,361	2%	\$26,784	5%
Tresidder Express	\$3,348	1%	\$8,919	2%	\$7,536	1%	\$19,804	3%
The Axe/Palm	\$1,941	0%	\$8,865	2%	\$8,936	2%	\$19,741	3%
Arbuckle Café	\$3,671	1%	\$8,721	2%	\$5,184	1%	\$17,576	3%
Meyer/Tresidder Printers	\$2,834	1%	\$5,727	1%	\$4,261	1%	\$12,822	2%
Green Library Printers	\$1,334	0%	\$5,168	1%	\$3,817	1%	\$10,319	2%
Jamba Juice	\$2,243	0%	\$4,733	1%	\$3,010	1%	\$9,986	2%

askJane Activity

Visits Page Views
6,785 20,639



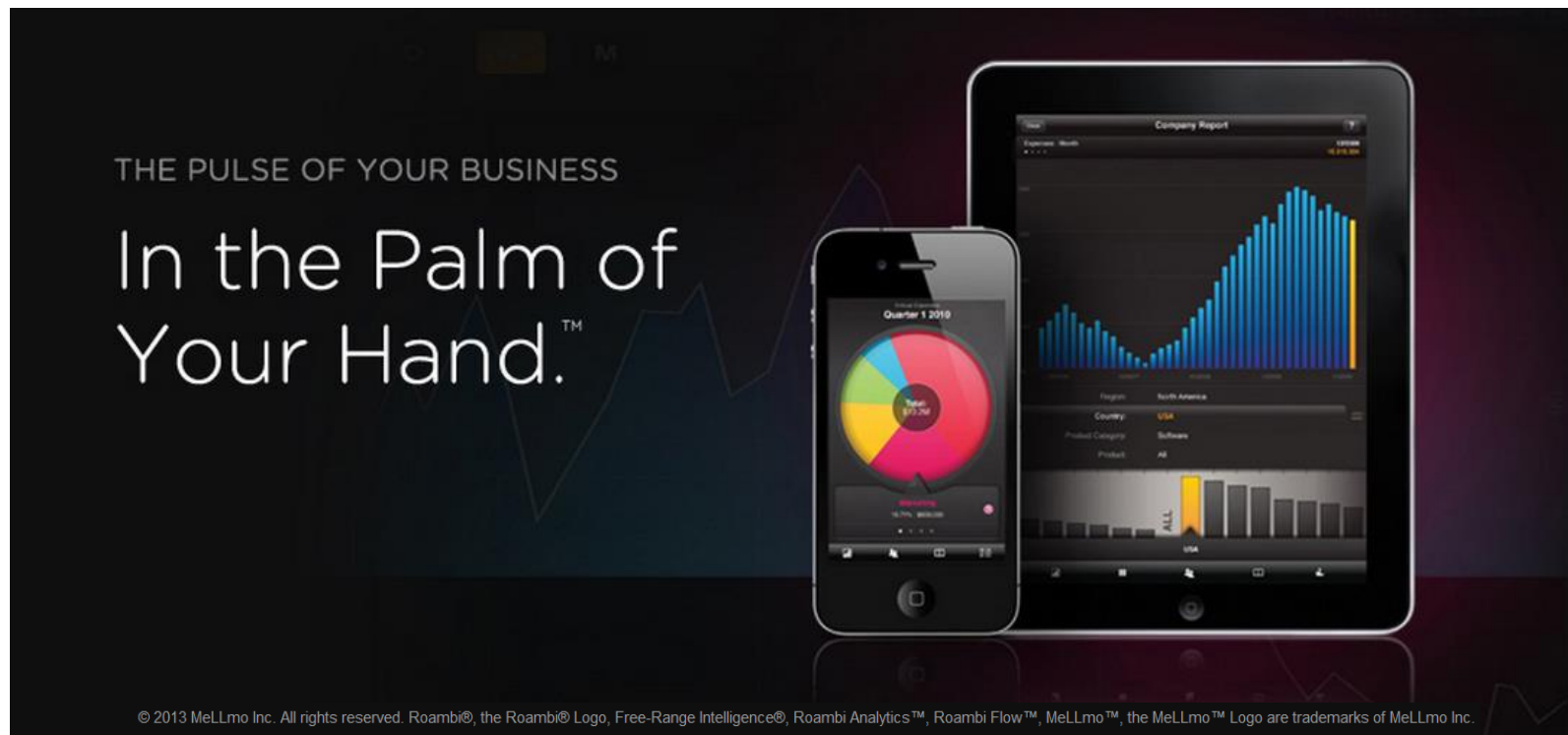
Payments and Refunds

		Sep-2011		Oct-2011		Nov-2011		Total	
Electronic Payments	Electronic Transfers/Wire-ACH	446	5%	174	3%	94	3%	714	4%
	ePay Payments	6,500	75%	5,552	86%	2,785	88%	14,837	81%
	Total	6,946	80%	5,726	89%	2,879	91%	15,551	85%
CASHNet/PeopleSoft	CASHNet/PeopleSoft Payments	1,753	20%	701	11%	286	9%	2,740	15%
	Total	1,753	20%	701	11%	286	9%	2,740	15%
	Total	8,699	100%	6,427	100%	3,165	100%	18,291	100%
Direct Deposit - Refund		3,455	83%	2,736	67%	1,259	75%	7,450	75%
Paper Checks - Refund		716	17%	1,374	33%	427	25%	2,517	25%
Total		4,171	100%	4,110	100%	1,686	100%	9,967	100%

Stanford University

Mobile Business Intelligence – Roambi Analytics

- Simplify your daily data into an interactive platform



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Any Questions?

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