



BIIS

Business Intelligence *for* Independent Schools

FAQs

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For any other questions, please contact Mary Kay Markunas, research@nboa.org or 202-407-7135.

How do I log in to BIIS?

1. Go to the NBOA Research page
2. Click on the “Access BIIS” button.

Resources ▾ Community ▾ Programs ▾ Publications ▾ Research ▾ Purchasing ▾ About NBOA ▾

Research / BIIS

Business Intelligence for Independent Schools

Business Intelligence for Independent Schools (BIIS) is NBOA's signature data-collection tool. It combines data from nearly every previous NBOA research effort to provide independent schools with a comprehensive look at their financial health, sustainability and staffing compared to similar schools in a national data set.

Exclusively for NBOA members, BIIS was designed by business officers, for business officers to analyze a wide range of operational and compensation data and distill it into accurate and meaningful graphs schools can use to set benchmarks and make important decisions.

The data collected include:

- Tuition and fees
- Compensation and staffing
- Facilities expenses
- Financial aid
- Annual giving income
- Auxiliary income and expenses
- Instructional expenses
- Administrative expenses
- Technology expenses
- Interest/Investment Income

[Access BIIS](#) **ACCESS THE BIIS PLATFORM**
Reporting is available if your data was submitted in November.

FEATURED

Culture Meets Compliance

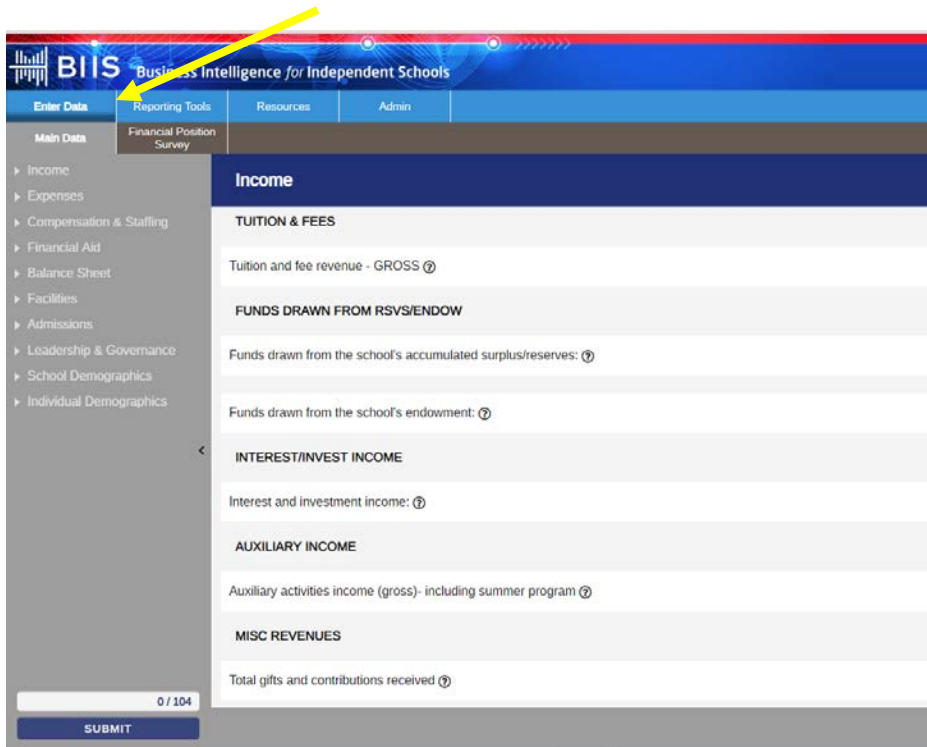
Culture Meets Compliance: NBOA's New Guide to Assessing Human Resources at Independent Schools

NBOA's hands-on guide (with bonus digital materials) will help ensure that your school's human resources operators comply with a growing list of federal requirements.

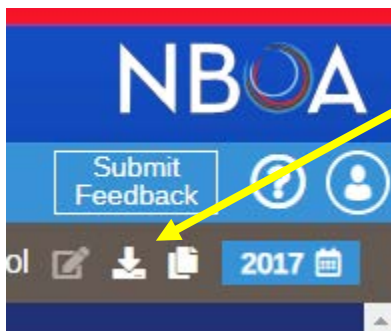
3. Click “login” in the upper right corner to enter the platform. If you are already logged into the NBOA website then you won't need to enter your credentials again. Otherwise use the same credentials you use for NBOA.org.

How can I view and print a list of data points collected?

1. After logging in, click “Enter Data” tab in the upper left.



2. Click on the “Download Data” icon on the upper right side of the screen.



3. Save the file that downloads to your computer. The file will contain the data you have previously entered also.

What fiscal year do I provide data from?

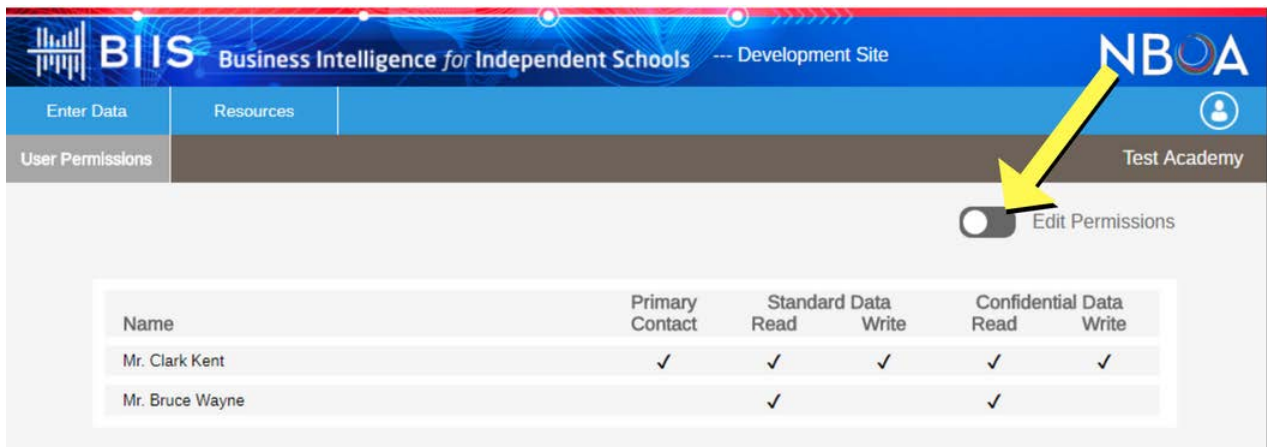
All data is for the **2017-18** fiscal year, including the compensation data. Please use the draft of your annual audit for the financial data points as indicated, if possible.

How do I let other employees at my school access BIIS?

1. To access the permission page, click the user image in the upper right corner (person in circle), and then click "School Admin."

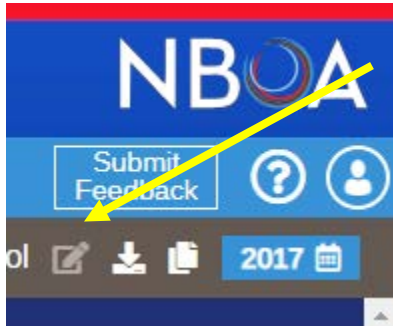


2. When you enter, you will see a list of your colleagues (those who have NBOA log-in credentials). Click "Edit Permissions," and click to add or remove checkboxes for each individual listed. **Note: Only the school's "Primary Contact" has permission to read and write all data and to edit permissions for others. Data marked "confidential" involves compensation; access to it should be limited to only the Primary Contact, head of school, human resources director or payroll/benefits administrator.**

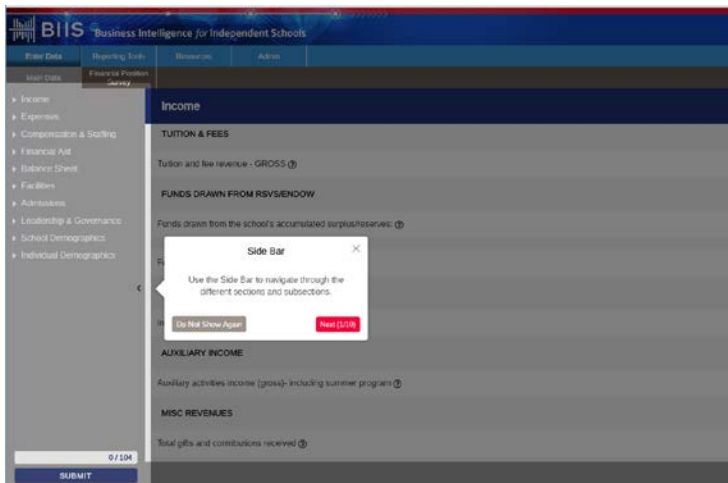


How do I begin entering data?

1. Click “Enter Data” in the upper left corner.
2. Select the “Main Data” tab to begin entering your FY 2017-2018 data.
3. Click on the “Edit Data” icon in the upper right-hand corner.



4. If you need further explanation of a requested data point, hover the cursor over the question mark at the end of it.
5. The first time you access BIIS to enter data, a Wizard will pop up to show you around the site. There is a Wizard for the data entry, reporting tools and peer group tabs.



How do I find out what each data point means?

1. Click on “Resources” in the upper left corner.
2. Use the menu on the vertical navigation bar (at left) to jump to the relevant definition.

Name	Definition
Annual giving	Value of donations (unrestricted gifts and contributions) given to school for past fiscal year. From audit's Statement of Activities - unrestricted column
Auxiliary activities income (gross)- including summer program	Value of the gross income from programs that are not part of the main educational program. These may include summer program, school store, rental of facilities, and sometimes food service. From audit's Statement of Activities unrestricted column
Funds drawn from the school's accumulated surplus/reserves:	Dollars moved from surplus accounts during the fiscal year
Funds drawn from the school's endowment:	Income provided by endowment investments for the most recent past fiscal year. Endowment is defined as monies donated to the school where the principal is to be preserved and only a board-approved spending percentage of the income used for the benefit of the school.
Interest and investment income:	Total of interest plus gains minus losses on surpluses and reserves for the most recent past fiscal year
Is total gifts and contributions in the row above on a cash basis or GAAP basis	Cash basis means the total is unadjusted for change in pledges receivable. GAAP basis means the total has been adjusted for a change in pledges receivable from prior fiscal year end to current fiscal year end
Other revenues	Value of all unrestricted operating revenues not included in gross tuition and fees; annual giving; other unrestricted gifts and contributions; auxiliary activities; investment income applied or any endowment income. From audit's Statement of Activities - unrestricted column
Other unrestricted gifts and contributions	Value of other unrestricted gifts and contributions (if any) which are not included in annual giving. From audit's Statement of Activities - unrestricted column
Total gifts and contributions received	Dollar value of all unrestricted, temporarily restricted and restricted gifts and pledges received in the past fiscal year. Including annual giving and other unrestricted gifts and contributions entered previously. From audit's Statement of Activities - total column
Total operating income from all sources	Total of all revenues for the past fiscal year. From audit's Statement of Activities - unrestricted column.
Tuition and fee revenue - GROSS	Value of tuition income and fee income charged to students before need and merit based scholarships and tuition remission. From audit's Statement of Activities - unrestricted column

How do I know which data is required and which is optional?

Most data points are required so that BIIS can provide a complete and useful data set. The word “optional” appears beside data points that are not required.

What if my school does not have a required data point?

Enter zero (0) in the required data field.

What do the orange and red boxes mean?

After you enter data, an orange or red outline will appear around the data box, and an explanation will appear. Orange is a signal for you to confirm that the data is correct before entering. Red means the data must be changed.

How do I limit the number of employees for whom I must enter compensation data?

1. In the “Compensation & Staffing” section, navigate to the page for each group of employees.
2. In the column labeled “Position Exists?” check the box if there is a person who performs that function at your school.

The screenshot shows the 'Compensation & Staffing' section for 'MANAGERIAL LEVEL EMPLOYEES'. The interface includes a left-hand navigation menu with categories like 'Income', 'Expenses', and 'Compensation & Staffing'. The main content area is a table with the following columns: 'Generic Title', 'Position Exists?', 'Indicate if this position is considered Faculty or Staff', 'Does this position work full year or academic year', 'FTE-enter 1.00 for full-time', 'Annual Gross Salary or Hourly Rate (if non-exempt)', 'Year Experience in this position', and 'Housing'. A yellow arrow points to the 'Position Exists?' column header. The table lists various roles such as 'Head's Spouse', 'Assistant Head', 'Dean of Faculty', 'Chief Academic Officer', 'College Counseling - Director', 'College Counseling- 2nd highest', 'Dean of Students', 'Librarian', 'School Chaplain', 'School Counselor', 'Director of Diversity', and 'Middle School Head'. Each row has a checkbox in the 'Position Exists?' column.

3. Once you have checked a “Position Exists?” box, fields will appear for you to complete relative to the position.

How do I check my progress?

There is a progress bar at the bottom of the vertical navigation bar. The numbers in the progress bar indicates the number completed and the total number of data points selected.

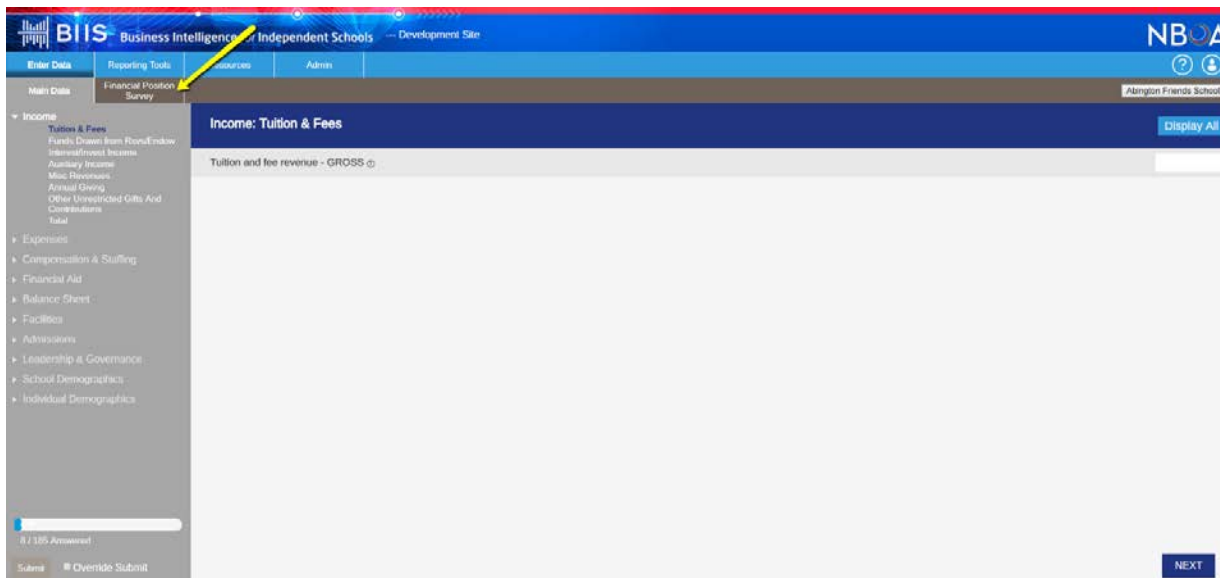
The screenshot shows the 'Compensation & Staffing' section for 'GENERAL'. The interface includes a left-hand navigation menu with categories like 'Main Data', 'Financial Position Survey', 'Income', 'Expenses', and 'Compensation & Staffing'. The main content area is a form with several sections: 'Instructional & Instructional support personnel FTEs', 'Athletics personnel FTEs', 'Academic Administrative FTEs', 'Technology FTEs', 'Business Office FTEs', 'Human Resources FTEs', 'Admissions FTEs', and 'Development/Communications FTEs'. A yellow arrow points to the progress bar at the bottom of the navigation bar, which shows '0 / 104'. Below the progress bar are 'SUBMIT' and 'BACK' buttons.

How do I save my data so I can work on it later?

Your data will automatically save as you move through the platform. There is no “save” button.

How can I view only the Financial Position Survey data points?

1. Click “Enter Data”
2. Click the “Financial Position Survey” tab



Under “Leadership and Governance,” what if my school does not have term limits on board members/board chair?

If you do not have term limits on board members or your board chair, enter 30 in the field.

Should my operating expense or balance sheet items add up to my financial statements?

BIIS collects some expense and balance sheet items, not all. The sum of these items may not be equal to your totals.

How do I submit my data?

1. When you have answered all required questions, the “Submit” button at the bottom of the vertical navigation bar will turn solid blue. Click on it to submit your data.

- Once you have submitted your data, you can again download an Excel file with your data. You will also receive an email from research@nboa.org confirming and thanking you for your submission. Your data will be reviewed prior to being added to the main data set.



A screenshot of a web form for data submission. The form consists of three text input fields stacked vertically, each with a small circular icon to its right. The fields are labeled: "Human Resources FTEs", "Admissions FTEs", and "Development/Communications FTEs". Below the fields is a white rectangular box containing the text "0 / 104". At the bottom of the form are two buttons: a blue "SUBMIT" button on the left and a white "BACK" button on the right. A yellow arrow points from the top of the "SUBMIT" button to the top of the "Human Resources FTEs" field.