



FAQs

1. [What information do I need to have available to enter my school's data?](#)
2. [How do I log in to BIIS?](#)
3. [How do I begin entering data?](#)
4. [How can I view and print a list of all data points collected?](#)
5. [What fiscal year data is BIIS collecting right now?](#)
6. [How do I let other employees at my school access BIIS?](#)
7. [How do I find out what each data point means?](#)
8. [How do I know which data is required and which is optional to submit?](#)
9. [What do the orange boxes mean?](#)
10. [What if a data point is not applicable to my school?](#)
11. [How do I check my progress on the data entry?](#)
12. [How do I save my data so I can work on it later?](#)
13. [How can I see if I have completed the data points for the Financial Position Survey, CFI, Financial Dashboard or Commonfund?](#)
14. [Should my operating expense or balance sheet items add up to my financial statements?](#)
15. [How do I submit the data when I'm finished?](#)
16. [What is the Commonfund Benchmarks Study® of Independent Schools \(CSIS\)?](#)

For any other questions, please contact Elizabeth Dabney, research@nboa.org or 202-407-7149.

What information do I need to have available to enter my school's data?

Be sure to have this information at hand to enter your school's data:

- Finalized audited financial statement for FY20, especially the Statement of Financial Position, Statement of Cash Flows, Statement of Activities and audit notes
- Financial aid data including
 - Number of students receiving merit based financial aid/scholarships, need-based financial aid or tuition remission
 - Total amount of merit based financial aid/scholarships, need-based financial aid or tuition remission awarded
 - Percentage of past fiscal year financial aid budget awarded to new students and returning students
- Admissions data including
 - Headcount of children enrolled and attending school as of the first day of classes for the 2019-2020 school year
- Staffing data including total FTEs for entire school and in
 - Academic Administrative
 - Admissions

- Athletics Personnel
- Auxiliary Programs
- Business Office
- Development/Communications
- Facilities
- Human Resources
- Instructional & Instructional Support
- Technology
- Annual gross salary data for
 - Head of School
 - Chief Business Officer
 - Controller
 - Director of Human Resources
 - Director of Facilities
 - Director of IT

While not all of these positions may apply to your school, keep in mind that you will only be able to access the benchmark reporting for positions for which you have entered salary data.

To be considered a “participant” in the Commonfund Benchmarks Study® of Independent Schools (CSIS), you must provide total endowment assets, total net annualized 1-year return, asset allocation, and effective spending rate.

How do I log in to BIIS?

1. Go to the NBOA website (www.nboa.org).
2. Click on the word “BIIS” at the top of the screen in the brown bar.



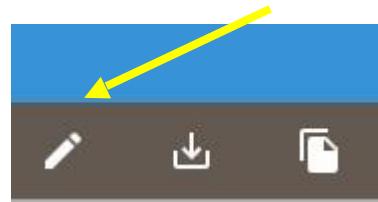
Advancing Business Excellence in Independent Schools

Resources ▾ Community ▾ Learning ▾ Publications ▾ Research ▾ Purchasing ▾

3. Click “login” in the upper right corner to enter the platform. If you are already logged into the NBOA website, you won’t need to enter your credentials again. Otherwise, use the same credentials you use for NBOA.org.
4. To optimize your BIIS experience, we highly recommend using Google Chrome as your internet browser.
5. If you are having trouble accessing BIIS after logging in (e.g., the screen is blank), contact your school’s IT department to ensure that your school’s internet security settings are not blocking your access to BIIS.

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 2019-2020** data.
3. Click on the “Enable Editing” pencil 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 are Wizards for the data entry, reporting tools and peer group tabs.



Income: 2019 - 2020

Tuition & Fees

Funds Drawn From

Reserves/Endowment

Interest/Investment Income

Auxiliary Income

Misc Revenues

Annual Giving

Other Unrestricted Gifts And Contributions

Total

Expenses: 2019 - 2020

Financial Aid: 2019 - 2020

Income: 2019 - 2020

TUITION & FEES

Tuition and fee revenue - GROSS ?

Side Bar

Use the Side Bar to navigate through the different sections and subsections.

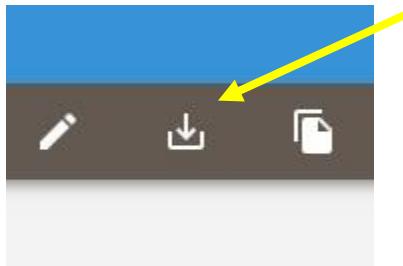
Do Not Show Again Back Next (2/9)

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

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

The screenshot shows the BIIS software interface. At the top, there's a blue header bar with the BIIS logo and the text "Business Intelligence for Independents". Below the header, there are three main tabs: "Enter Data" (which is highlighted with a yellow arrow), "Reporting Tools", and "Resources". Underneath these tabs, there are two main sections: "MAIN DATA" and "FINANCIAL POSITION SURVEY". The "MAIN DATA" section is expanded, showing a list under the "Income" category. This list includes "Tuition & Fees", "Funds Drawn from Reserves/Endowment", "Interest/Investment Income", "Auxiliary Income", "Misc Revenues", "Annual Giving", "Other Unrestricted Gifts And Contributions", and "Total". There are also collapsed categories for "Expenses", "Financial Aid", "Balance Sheet", "Facilities", "Admissions", and "School Demographics". To the right of the main data list, there are several summary boxes with titles like "Income", "TUITION & FEES", "FUNDS DRAWN FR", etc., each containing some descriptive text. A large grey button with a left arrow is located at the bottom of the main data list.

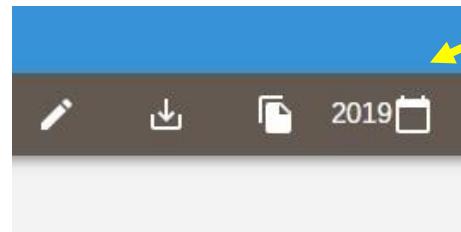
2. Click on the “Download Data” icon on the upper right side of the screen.



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

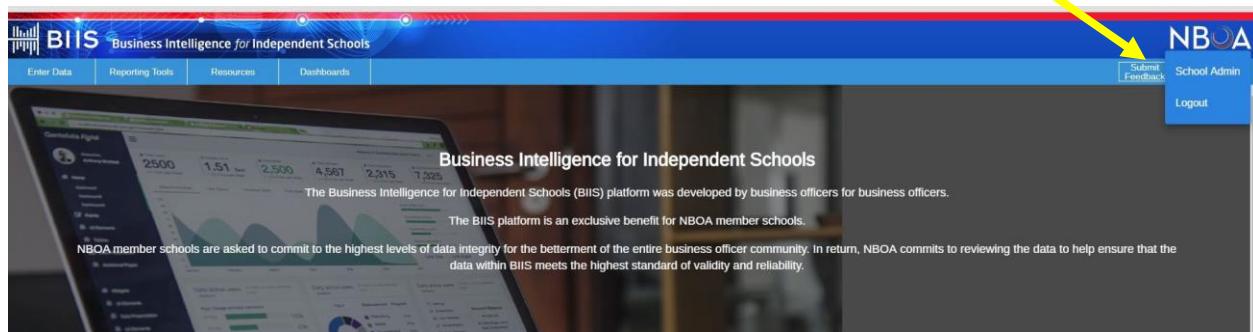
Which fiscal year data is BIIS collecting right now?

All data is for the **2019-20** fiscal year, including the compensation data. Please use your annual audit for the financial data points as indicated. If you would like to enter data for prior years, you may do so by changing the year next to the calendar icon. Click on the icon and select the year for which you would like to enter the data. You will need to enter all the financial data points for the year to be able to submit the data for that year.

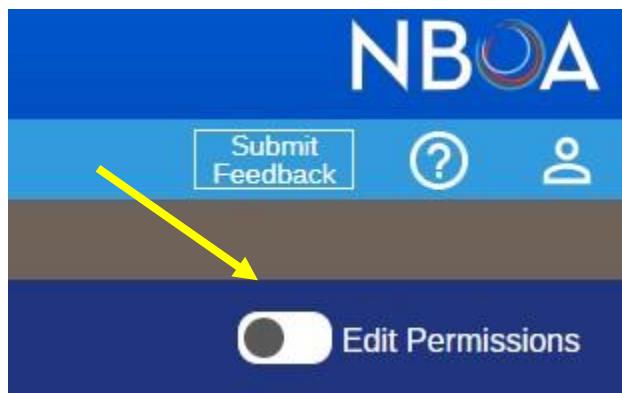


How do I let other employees at my school access BIIS?

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 individual compensation; access to it should be limited accordingly.**



Name	Primary Contact	Standard Data Read	Confidential Data Read	Confidential Data Write
Mr. Clark Kent	✓	✓	✓	✓
Ms. Lois Lane		✓		

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.

The screenshot shows the BIIS software interface. At the top, there's a blue header with the BIIS logo and the National Business Officers Association (NBOA) logo. Below the header, the top navigation bar has four buttons: 'Enter Data', 'Reporting Tools', 'Resources' (which is highlighted in blue), and 'Admin'. To the right of the 'Resources' button is a 'Submit Feedback' button and a user icon. On the far left, there's a vertical navigation bar with several categories: 'Data Dictionary' (which is also highlighted in blue), 'FAQ', 'Income', 'Expenses', 'Compensation & Staffing', 'Financial Aid', 'Balance Sheet', 'Facilities', 'Admissions', 'Leadership & Governance', and 'Individual Demographics'. The main content area is titled 'Income' and contains a table with two columns: 'Name' and 'Definition'. The table lists various income items with their definitions. For example, 'Annual giving' is defined as 'Value of donations (unrestricted gifts and contributions) given to school for past fiscal year. From audit's Statement of Activities - unrestricted column'. There are also sections for 'Funds drawn from the school's accumulated surplus/reserves:', 'Interest and investment income:', and 'Other revenues'. At the bottom of the table, there's a section titled 'Expenses'.

How do I know which data points are required and which are 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 do the orange 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 continuing.

What if a data point is not applicable to my school?

Enter zero (0) in the required data field.

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 out of the total number of data points.



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 see if I have completed the data points for the Financial Position Survey, CFI, Financial Dashboard or Commonfund?

1. Click “Enter Data”.
2. Click the “Financial Position Survey,” “Commonfund,” “CFI,” or “Financial Dashboard” tab.
3. You will see data and can go scroll through each section to ensure you have completed all the relevant data points for that report. Some data points are used in multiple reports so they will show up on several tabs.

A screenshot of the BIIS platform interface. At the top, there is a horizontal navigation bar with tabs: 'MAIN DATA', 'FINANCIAL POSITION SURVEY', 'COMMONFUND', 'CFI', and 'FINANCIAL DASHBOARD'. The 'FINANCIAL POSITION SURVEY' tab is highlighted. Below the tabs, there is a sidebar on the left with a list of categories: 'Income: 2019 - 2020', 'Tuition & Fees', 'Funds Drawn From', 'Reserves/Endowment', 'Interest/Investment Income', 'Auxiliary Income', and 'Misc Revenues'. The main content area shows the 'Income: 2019 - 2020' section, which is further divided into 'TUITION & FEES' and 'Tuition and fee revenue - GROSS'. A yellow arrow points from the 'FINANCIAL POSITION SURVEY' tab towards the 'Income: 2019 - 2020' section.

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

No. BIIS collects some expense and balance sheet items, not all. The sum of these may not be equal to your totals.

How do I submit my data?

1. When you have answered all required questions, the progress bar at the bottom of the vertical navigation bar will say "COMPLETE". Click on the **submit** button to submit your data.
2. Once you have submitted your data, you can 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 and approved prior to being added to the main data set. Reporting will be available only after the data sets from all schools submitting have been approved.



What is the Commonfund Benchmarks Study® of Independent Schools (CSIS)?

The CSIS is a one-of-a-kind research study of independent school endowments for which Commonfund Institute and the National Business Officers Association (NBOA) have partnered to produce since 2009. Both Commonfund and NBOA are committed to streamlining the data collection process. New this year, NBOA members will be making their submissions for the 2020 CSIS directly into BIIS. The data you provide in BIIS for the CSIS will be consolidated with the data from non-NBOA member independent schools to produce the full study. You can access the 2019 report on the [NBOA website](#). For help with the Commonfund questions, contact them at benchmarks@commonfund.org. View the CSIS glossary at <https://www.commonfund.org/glossary>.