Deeper Insights from Your Data

Could you be using data more strategically to improve benchmarking and reporting?

While business officers are known for their appreciation of data, others on the senior leadership team with whom they regularly share key data points may have less natural affection. This requires careful reporting and communication of the most meaningful data points at appropriate levels and intervals. Furthermore, the bounty of data sources available to business officers these days can make efficient and effective data collection challenging. Which data sources should you focus on and analyze? Which data points are the most meaningful, and which can you trust?

As someone who has worked with data all my professional life, in different sectors, I have developed some guiding principles on gathering, analyzing and reporting meaningful data. I am sharing them here in hopes they will inform or improve your processes and, ultimately, outcomes in data-driven discussions important to your school’s finances and operations.

GATHERING DATA

Ask questions. The first step in gathering data is not actually gathering data. Start by determining the questions you want to ask and what you hope to learn, and ensure that school leadership is in agreement. While this may seem to take more time initially, it will save time in the long run and lead to more fruitful discussions. It’s easy to jump right into spreadsheets and bar charts, but skipping this step can lead to data gathering that doesn’t address root questions or issues.

For example, the obvious tactical question may be, “How many athletics, health and physical education full-time employees (FTEs) do we need next year?” But the broader strategic question your leadership is really grappling with is, “How healthy is our school community — and do we need to change course to improve student wellness?” Challenge yourself and your school’s leadership to articulate strategic questions whose answers will help you make strategic decisions. Before gathering isolated data points, consider questions like these for any given area of exploration:

- Are we meeting our goals, and how do we know? Where are our gaps?
- What’s working and what’s not for the members of our school community and under what conditions?

BIIS Open for Reporting

Pending data scrubbing efforts, we expect NBOA’s BIIS data platform to open for reporting in mid-January. Member schools that submitted FY20 data last fall will be able to use the cohort benchmarking tools, NBOA Financial Dashboard, CFI Calculator and other resources in BIIS.

biis.nboa.org

- Is it time to discontinue a long-standing practice or change course?
- Based on our current budget and financial status, might we need to allocate greater — or fewer — resources to this area?

Consider the source. The source of data speaks to its accuracy and reliability. Is the source credible? Do you think the data measures what it says it does? Was the information collected in a consistent and ethical way?

You may also want to consider new sources of data to better answer key questions. Taking the example question about school community wellness, you might examine air quality, water quality or mental health research that could address school community needs. Look for data that provides context, such as the age, size and condition of your athletic and physical education facilities, and programs and practices within these departments, which can help you interpret the meaning of the data you are gathering.

Ensure that the data you are gathering represents any constituents who might be affected by the decisions or changes that may stem from its analysis. That includes everyone from students and parents, to faculty and staff, to alumni and donors.

And don’t forget about sources of qualitative data, like interviews and focus groups, that provide color to your quantitative data. Following our school community wellness example, in addition to examining your budget and staffing needs, you might conduct focus groups with students and parents to ask how the school could better meet their mental health needs. You may find out that you don’t need more FTEs but rather different types; the student community may be better served by a new staff member with expertise...
in yoga and meditation rather than one specializing in a new sport.

ANALYZING DATA
So what? This is a great question to ask upon analyzing the gathered data. Say you’ve determined how many athletic, health and physical education FTEs your school needs for next year. Is this number smaller or larger than you expected? Is it an increase or decrease from previous years? How does it compare to peer schools? Does this number help your school meet your goals for a healthy community? This helps move analysis one (or more) steps deeper.

Listen to what that data tells you.
Sometimes the data you gather doesn’t directly answer the initial question. It can, however, point you in a new direction, serve as the foundation for difficult conversations, spur additional questions or get everyone on the same page with a common understanding of a problem. Simply analyzing data to determine athletics, health and physical education FTEs for next year doesn’t fully address the degree of school community wellness, but perhaps benchmarking leads to a discussion about a new health education curriculum that may better address students’ current needs.

REPORTING DATA
Report data at the appropriate level.
Consider leadership’s point of view and report data at a level that is both understandable and actionable for all team members. This could look like a few bulleted key findings, a series of visual graphs or charts, or a combination of these. Go back to the questions that the leadership asked and report data at the same level as the questions. A more detailed question can benefit from more detailed reporting. Be sure to include caveats, context and areas for further exploration.

Finally, thank you to all NBOA member schools who entered data in BIIS this fall. By the time you receive this magazine, you should be able to use BIIS reporting tools yourself. And watch for the next iteration of this column, in the March/April issue, which will delve into analysis of the past fiscal year’s submitted data. As everyone’s new or next “normal” changes by the day, the trends gleaned from BIIS are more important than ever.

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