

CASE STUDY

Embedding Data in Review Process to Improve Resource Allocation

St. Ambrose University, Private Masters University in Davenport, IA

- **About:** St. Ambrose University (SAU) is a private university with a total enrollment of 2,916.
- **Challenge:** Department chairs and deans lacked accessible data to inform and measure the impact of resource allocation decisions. Existing reports included disparate data points and required extensive manual analysis.
- **Solution:** SAU used Edify to standardize all required data, then produced reports with custom data and filters for each department Chair. Edify enabled SAU to use key department-level metrics to inform resource requests and make allocation decisions. Streamlined, customized reports provided the exact data department Chairs needed to see, increasing decision-making efficiency.
- **Impact:** SAU's partnership with Edify has improved transparency in the resource allocation process. With easily accessible data, the labor-intensive and time-consuming process of analyzing different data points has been drastically reduced. Additionally, SAU has identified opportunities to shift resources to high-demand departments.

Impact Highlights

1,000 hours

Time saved by eliminating manual data collection and analysis

\$500K

Saved by understanding what positions needed to be replaced after a retirement incentive was offered

Streamlining Department Review Process with Standardized Data

In previous years, SAU's Faculty Finance Committee (FFC) reviewed data for a few select departments. Using Edify, the finance team was able to create department-level reports to measure the health of all departments. With access to operational and financial metrics, department chairs understood how their operational decisions impacted their financial results. The reports analyzed 40 departments and used 18 metrics for a comprehensive but streamlined view of critical metrics.

Edify Analyses Used to Create Departmental Reports



Enrollment Trends

- How many majors are enrolled in my department's courses?
- How have attempted student credit hours changed over time?
- What is the trend in student credit hours over the past five years?
- Are student credit hours taught to majors, or is this primarily a service department?



Section Size and Utilization

- How full are classes?
- Can we offer courses less often?
- What are the median sizes of classes, and how has that changed over the past five years?
- How do median section sizes compare to benchmark schools?



Faculty Mix and Workload

- How many courses are instructors teaching? Has this changed over time?
- What percentage of sections, credit hours, and student credit hours are taught by full-time faculty?
- How do workload levels compare to benchmark institutions?



Costs

- What is the current distribution of costs in my department?
- How does this compare to my peers?



Class Size

- How many sections are under ten students?
- Is there a need to have small class sizes?
- Are there sections with low fill rates? Can these courses be offered less often?

Surfacing Resource Reallocation Opportunities Across Departments

Leveraging the reports generated for each department, the FFC was able to engage in data-supported conversations with deans, chairs, and faculty. Together, they reviewed the reports to identify insights and opportunities.

Faculty Finance Committee Meetings

Reviewed reports with academic stakeholders

- Used departmental reports to facilitate discussions about current use of resources
- Asked targeted questions to illuminate existing efficiencies and potential opportunities

✓ Improved transparency and standardized process

Department Chair Buy-In and Agreement

Used reports to understand departmental performance and resource use

- Achieved consensus about which departments to prioritize for resources

Opportunities Illuminated Through Updated Review Process



Maximum Capacity

Accurately document maximum capacity to correctly measure fill rates and instructional capacity



Intercurricular Dependency

Align distinct course offerings with student enrollment trends, such as in departments teaching large share of non-majors



Faculty Course Loads

Balance course loads – particularly for full-time, tenured faculty who currently teach most courses



Bottleneck Courses

Consolidate low-fill sections and reallocate resources to bottleneck courses

Impact of Engraining Data into Decision Making

Making Data-Informed Decisions with Edify

Administrative Impact

1,000 Hours

saved by using standard reports, rather than the FFC creating reports from scratch

Academic Planning Outcome

\$500,000

In reallocated faculty lines saved after Edify assisted management in understanding which positions needed to be replaced

Departments Served

100%

departments reviewed, instead of select handful of departments