

Jimmy Barnes and Russ Hannah

Higher Education Analytics BUD 2247



How would you describe
your institution's use of
analytics today?

Introductions

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Clemson University



Clemson University is a public land-grant research university (R1) in Clemson, South Carolina. Founded in 1889, Clemson is the second-largest university in South Carolina.

Clemson By The Numbers

24,060

UNDERGRADUATE
STUDENTS

5,485

GRADUATE STUDENTS

94.1%

FIRST-YEAR RETENTION
RATE (FALL 2024)

80+

MAJORS

90+

MINORS

130+

GRADUATE DEGREE
PROGRAMS

87.5%

SIX-YEAR GRADUATION
RATE

16:1

STUDENT-TO-FACULTY
RATIO (FALL 2024)

\$240M

AWARDED IN EXTERNAL
RESEARCH FUNDING
(FY2025)

FOUNDED IN
1889

LOCATED IN
**CLEMSON,
SOUTH
CAROLINA**

INTERIM
PRESIDENT
**ROBERT H.
JONES**

Introductions

Russ Hannah, Ed.D., CPA, CGMA, CGFM
rhannah@astate.edu





Arkansas State University



- **Arkansas State University (A-State or ASU)** is a public research university (R2) located in Jonesboro approximately 70 miles northwest of Memphis, TN. It is the flagship campus of the Arkansas State University System and the second largest university in Arkansas. A-State was founded in 1909 and sits on 1,376 acres.
- **Enrollment:** 15,800+ **Faculty/Staff:** 1,500+ **Fields of Study:** 150 **Facilities:** 145 buildings
Alumni: 90,000+ **Athletics:** NCAA Division 1 **Conference Affiliation:** Sun Belt
- **Assets at 6-30-25:** \$511,213,641 **FY27 Operating Budget:** \$254,226,654



Course Objectives

- Familiarize participants with various technologies used for data collection, evaluation, decision-making, and reporting.
- Examine current data evaluation methods used by higher education departments.
- Inspire participants to explore innovative ways to leverage data for informed decision-making.



Agenda

- ❖ Analytics review
- ❖ Data analyzed on our campuses
- ❖ Analytics in Higher Education
- ❖ Artificial Intelligence (AI)
- ❖ Communicating financial data

**Think about your role on campus.
What is one decision you make on
a regular basis that you simply
could not make without data?**

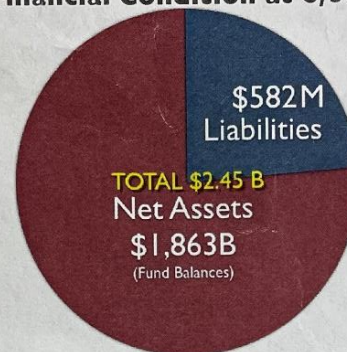
2005 University of Kentucky Dashboard

UK

1. The Financial Reporting Entity consists of UK and its ten affiliated non-profit Corporations

...
University of Kentucky
UK Research Foundation
UK Athletic Association
The Fund
Gluck Equine Research Foundation
Business Partnership Foundation
Mining Engineering Foundation
Humanities Foundation
Center on Aging Foundation
Central Kentucky Management Services
Kentucky Medical Services Foundation

2. Financial Condition at 6/30/05



3. Composition of Assets



4. Composition of Liabilities



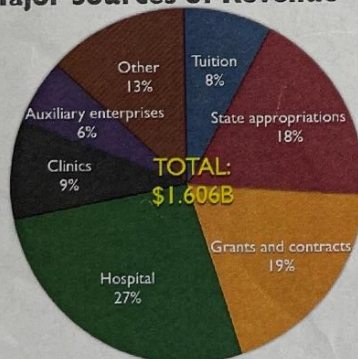
5. Fund Balances

Invested in capital assets	\$751M	40%
Property, plant and equipment, less accumulated depreciation and debt		
Non expendable restricted	\$394M	21%
Principal of permanent endowment		
Expendable restricted	\$216M	12%
Restricted donations, appreciation on endowment assets, quasi endowments		
Unrestricted	\$502M	27%
Not legally restricted, but subject to contractual agreements and Board/management designations		
Total net assets =	\$1.863 billion	

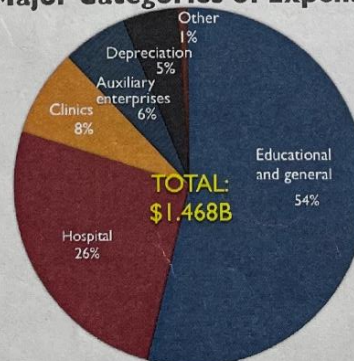
6. Unrestricted Net Assets Detail

	IN THOUSANDS
Hospital:	
General	125,263
Unexpended plant	33,391
Renewal & replacement plant	159,326
TOTAL HOSPITAL	317,980
UK plant funds	36,627
Quasi endowment and loan funds	21,374
Kentucky Medical Svcs Foundation	50,331
Other affiliated corporations	20,243
Current unrestricted educational and general	55,545
TOTAL	\$502,100

7. Major Sources of Revenue



8. Major Categories of Expenses

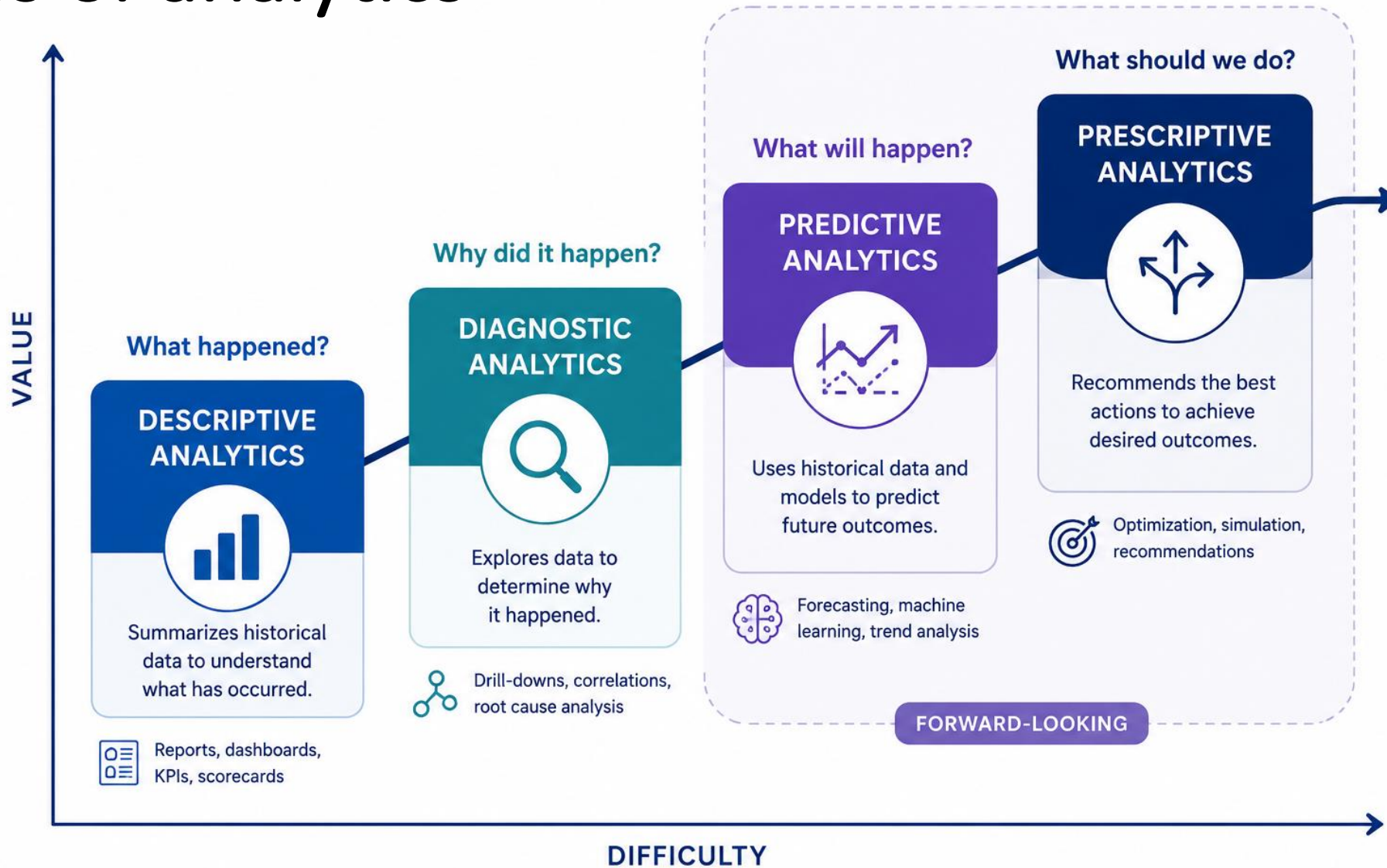


9. UK Unrestricted General Funds FY 04-05

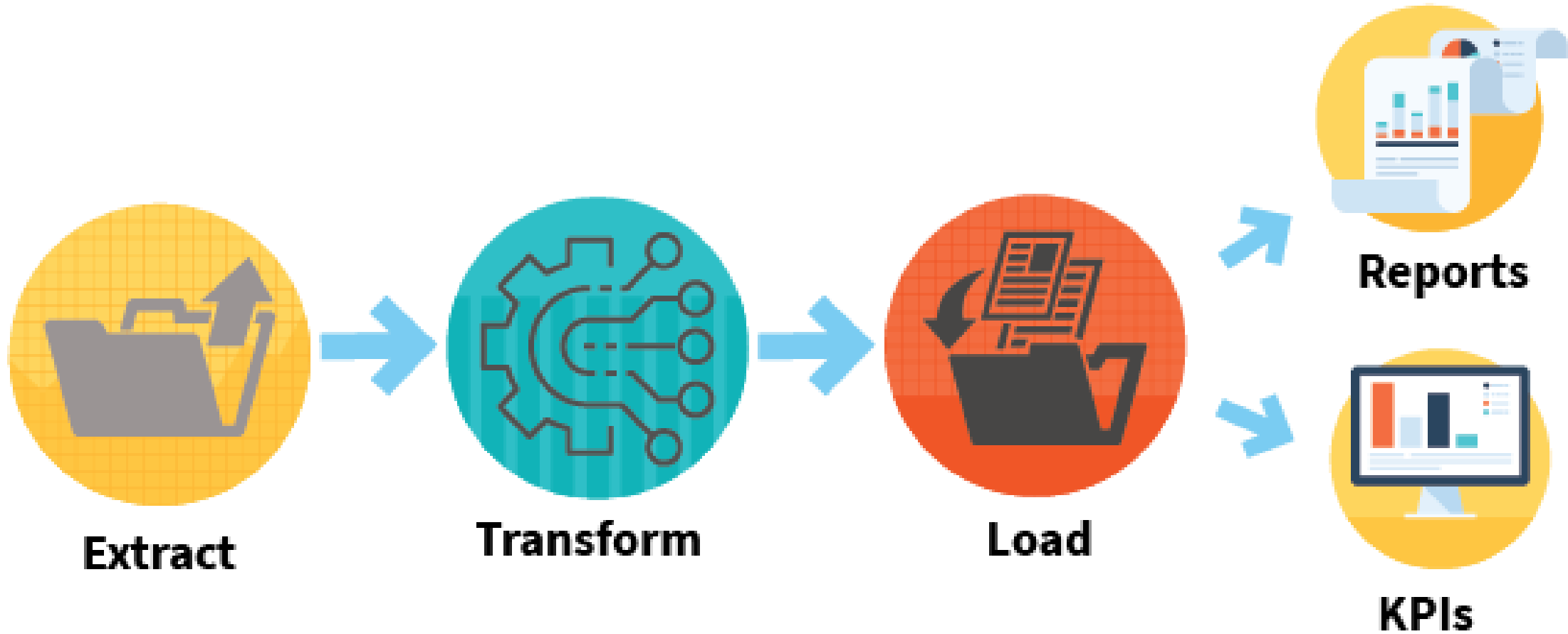
	REVENUE	EXPENSE
	IN THOUSANDS	IN THOUSANDS
Budget	\$669,818,782	\$669,818,782
Allocation of prior fund balance	(39,240,889)	(39,240,889)
Net budget	630,577,893	630,577,893
Actual	643,593,860	632,164,156
Over realization	13,015,967	(1,586,263)
Transfer of LCC to KCTCS		(1,353,894)
		(2,940,157)
Net increase in fund balance:		\$10,075,810

CONSOLIDATED FINANCIAL STATEMENT SUMMARY 2005

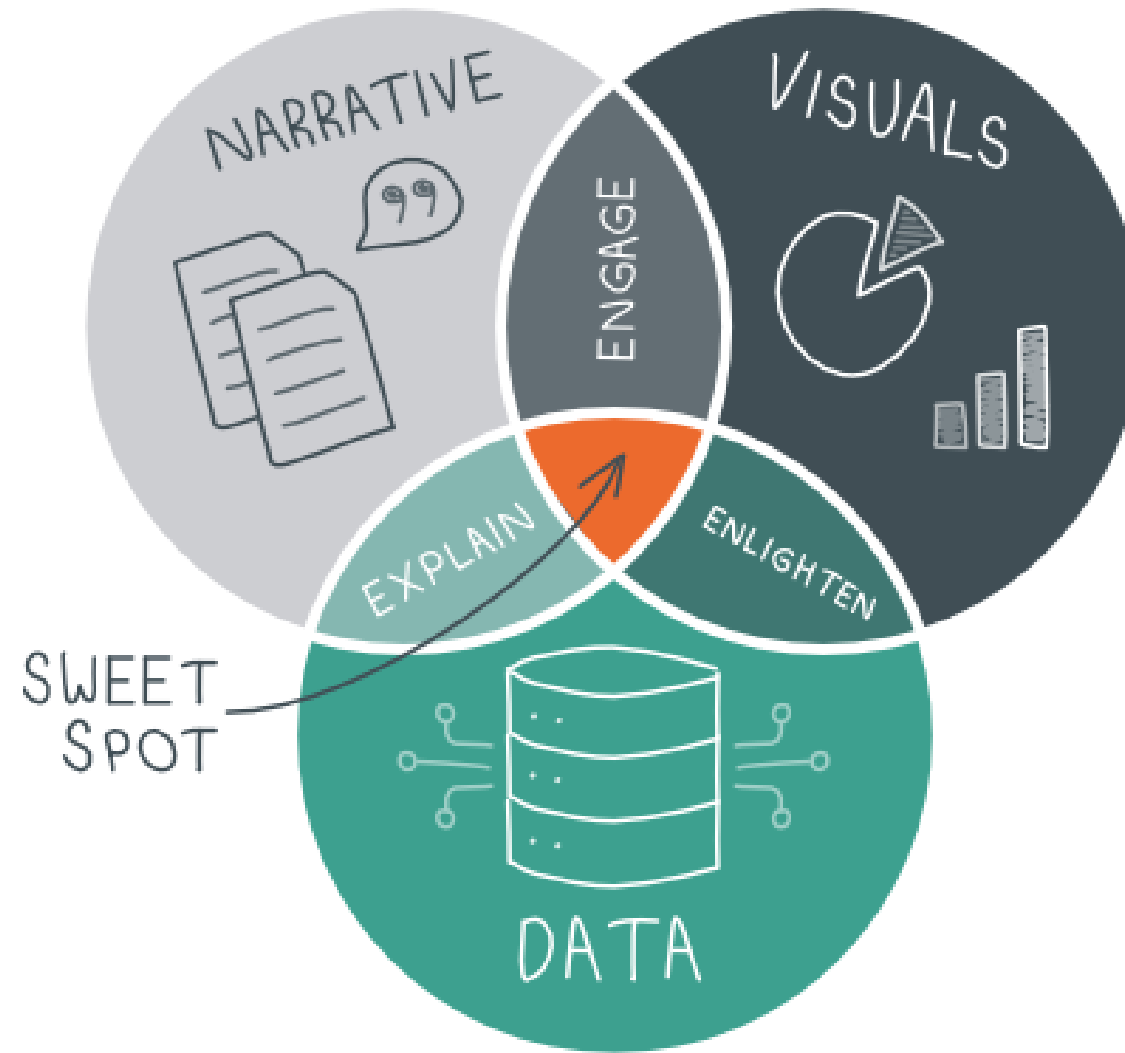
Types of analytics



Extract – Transform – Load (ETL)



Storytelling aspect of data analytics

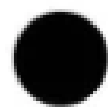


Visualization

Graphical representation of information in the form of a chart, diagram, picture.

How to build a good visualization

1. Know what you want to say
2. Construct a good story
3. Design for the viewer's eye
4. Add color to the story
5. Don't crowd your audience
6. Establish context
7. Combine text with tables and charts
8. Make your visual actionable



"If I had an hour to solve a problem and my life depended on the solution, I would use the first 55 minutes determining the proper question to ask, for once I know the proper question, I could solve the problem in less than five minutes."

--Albert Einstein (1879-1955)

What information is currently being captured and reported?

- What financial and/or nonfinancial data are you capturing for analytic purposes?
- How is the data being reported?
- What data are we not capturing, but should?





ENROLLMENT MANAGEMENT



Recruitment

Attract the right students



Admissions

Evaluate and admit the best fit



Financial Aid Awards

Allocate resources equitably and strategically



Retention

Support student success and persistence



Attract the right students and support their success from interest to enrollment and beyond.



ACADEMICS



Program Enrollment

Track program demand and student interest



Faculty Workload

Balance teaching, research, and service



Academic Program Assessment

Measure outcomes and continuous improvement



Graduation Rates

Monitor progress and improve completion



Deliver a high-quality academic experience and advance student achievement.



FACILITIES



Deferred Maintenance

Prioritize needs and extend asset life



Space Management

Optimize utilization and functionality



Environmental Management

Ensure a safe, healthy, and compliant campus



Sustainability Initiatives

Reduce impact and promote stewardship



Create safe, efficient, and sustainable spaces that support our mission and community.



FINANCIAL



Budget to Actual Report

Monitor performance and variances



Monthly/Quarterly/Annual Reporting

Deliver timely insights for decision-making



Annual Audit

Ensure accuracy and financial integrity



Compliance

Meet requirements and reduce risk



Ensure financial stewardship, transparency, and compliance to support long-term institutional sustainability.



STUDENT AFFAIRS



Student Engagement

Foster involvement and belonging



Well-Being & Support

Promote mental, physical, and holistic well-being



Student Success

Support retention, progress, and graduation



Programs & Services

Deliver impactful programs and essential services



Empower every student to thrive, lead, and achieve their goals.



HUMAN RESOURCES



Talent Acquisition

Attract and hire
top talent



Employee Development

Grow skills and
advance careers



Employee Experience

Foster engagement,
well-being, and inclusion



Compliance & Equity

Ensure compliance and
promote equity



*Empower our people. Strengthen our workforce.
Advance our mission.*



OTHER AREAS



Enterprise Risk Management

Identify, assess, and mitigate risks



Research / Sponsored Programs

Maximize research impact and funding



Athletics

Enhance performance and student experience



Parking Services

Improve access and operational efficiency



College Rankings

Strengthen reputation and visibility



ESG

Advance environmental, social, and governance goals



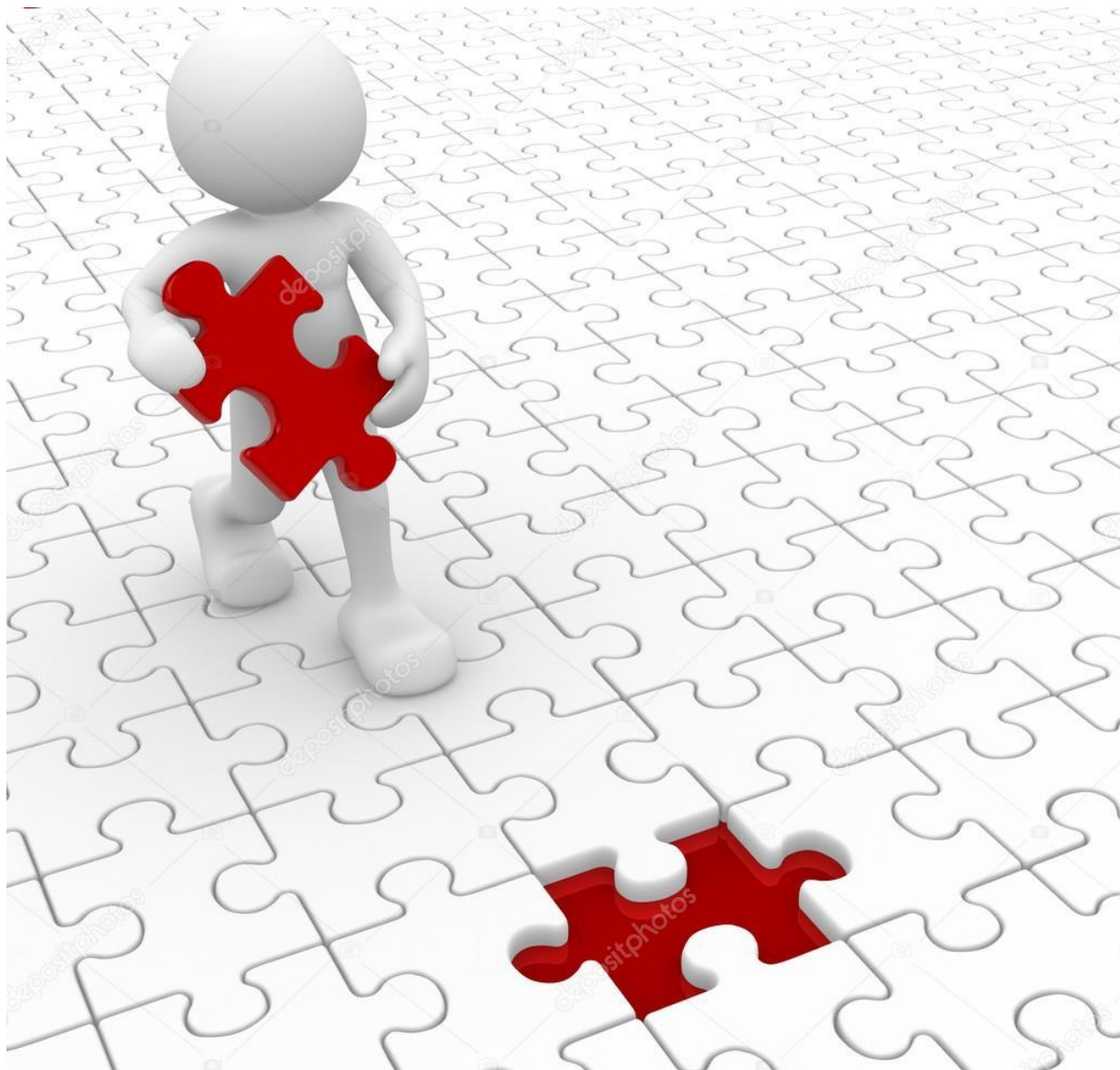
Town-Gown Relations

Build strong partnerships in our communities



Leverage data to strengthen performance, reputation, and our impact in the communities we serve.

What is the biggest challenge
your institution faces when
trying to turn data into
actionable information?



What else?





NACUBO Strategic Blueprint

September 20, 2019

- **Strategic Priority 1:** Engage higher education institutions in undertaking necessary transformations to strategically position themselves in the dynamic higher education environment.
- **Strategic Priority 2:** Increase proactive advocacy.
- **Strategic Priority 3:** Drive effective solutions in higher education.
- **Strategic Priority 4:** Strengthen the strategic leadership role of the CBO.
- **Strategic Priority 5:** Lead higher education's integration of analytics to achieve institutional strategic goals.

Higher Education Data Analytics Framework

CULTURE

- How can leaders create a culture that values data-informed decisions?
- How can business officers empower staff across the institution?
- How can business officers collaborate across the institution?

CONTINUOUS CHECK IN

- ✓ Does my institution support a data-informed culture?
- ✓ Is everyone on campus empowered to use data analytics?

HINDSIGHT

What happened?
Why did it happen?



INSIGHT

What is happening today?
Can we act on this information?



FORESIGHT

What could happen?
How can we achieve better outcomes?



RETURN ON INVESTMENT

What are the outcomes?
How has data improved our processes and outcomes?



CAPACITY

- What tools do we need to facilitate a data-informed culture?
- What skills do our staff need?

CONTINUOUS CHECK IN

- ✓ Does my institution have the human resources needed?
- ✓ Does my institution have the technology to support data analytics?

Notes:

Content in yellow [hindsight, insight, foresight] are adapted from Gartner Pictures (2012), <https://www.flickr.com/photos/27772229@N07/8267855748>. Other framework content was developed by NACUBO's Analytics Advisory Group in the fall of 2018.

Change with Analytics

<https://changewithanalytics.com>



“The Association for Institutional Research (AIR), EDUCAUSE, and the National Association of College and University Business Officers (NACUBO) stand together with a strong sense of urgency to reaffirm higher education’s commitment to the use of data and analytics to make better strategic decisions.”



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Analytics

The National Association of College and University Business Officers recognizes that higher education institutions are under increasing pressure to find new efficiencies at their institutions and to demonstrate that they are being good stewards of public dollars. Colleges and universities are embracing analytics and using data, technology, and specialized knowledge to improve overall success.

Analytics

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Accelerating Analytics

NACUBO's resource series, Accelerating Analytics, provides members with briefs that offer awareness, knowledge, and guidance that can support data-informed decision-making practices at colleges and universities.

[Learn More](#)

Analytics Research

Analytics can support institutional leaders as they make critical decisions. Click below to access recent findings on institutional uses of analytics and how business officers are addressing data challenges.

[Learn More](#)

Analytics Networking Opportunities

Ask questions, share experiences, and network with colleagues. Click "Learn More" to discover how you can connect and learn—online and in-person—with other professionals in higher education.

[Learn More](#)

Informing Decisions in Higher Education

Learn how analytics informs decisions in higher education via a framework designed by the [Analytics Advisory Group](#).



Articles, Case Studies, and Podcasts

Access articles, case studies, and podcasts related to higher education's integration of analytics to achieve institutional strategic goals.

[Learn More](#)

Change With Analytics Playbook

The Association for Institutional Research, EDUCAUSE, and NACUBO published 16 action-focused plays designed to support institutions in developing and maintaining data-informed decision-making.

Analytics Advisory Group

The principal charge of the Analytics Advisory Group is to advise and make recommendations to NACUBO's president, staff, and board of directors on activities related to NACUBO's effort to lead higher education's integration of analytics. This charge encompasses advice and needs assessment related to foundational concepts and best practices for the effective use of data and analytics to inform institutional decisions to enable the achievement of strategic goals.

Members of the Analytics Advisory Group understand that student success is paramount and affects institutional viability. Advisory group members are—

- Knowledgeable about data governance, literacy, frameworks, models, and definitions
- Leaders in collaboration, communication, and being mission-focused
- Experienced in assessing financial results and returns on investments
- Capable of influencing efforts to foster a culture of data-informed decision-making

NACUBO's Analytics Advisory Group is comprised of business officers as well as institution professionals who work in other units that collaboratively support institutions' analytics efforts (e.g., institutional research, information technology).

Advisory Group Members



Rebecca Barber, Ph.D.
Vice President, Financial Planning and Analysis
Michigan State University



Jimmy Barnes
Senior Lecturer
Clemson University



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On This Page

- [Advisory Group Members](#)



A Playbook for Success

Change With Analytics Playbook

The playbook has 16 action-focused plays. 13 are organized into the four sections below, and three on teamwork are repeated across all sections.

[Assess the Current State of Analytics](#)

[Create and Manage a Data Strategy Plan](#)

[Develop and Maintain a Data Governance Program](#)

[Build and Support a Data Literate Community](#)

A Playbook for Success

Change With Analytics: A Playbook for Success



Assess the Current State of Analytics

- Conduct an Analytics Self-Assessment
- Conduct a Needs-Assessment Focus Group
- Identify Strengths, Weaknesses, Opportunities, and Threats

Create and Manage a Data Strategy Plan

- Set a Vision for Analytics
- Develop an Analytics Strategy Road Map
- Generate Buy-In for a Data Product

Develop and Maintain a Data Governance Program

- Define Data Governance Roles
- Write a Data Governance Charter
- Facilitate a Data Steward Self-Assessment

Build and Support a Data Literate Community

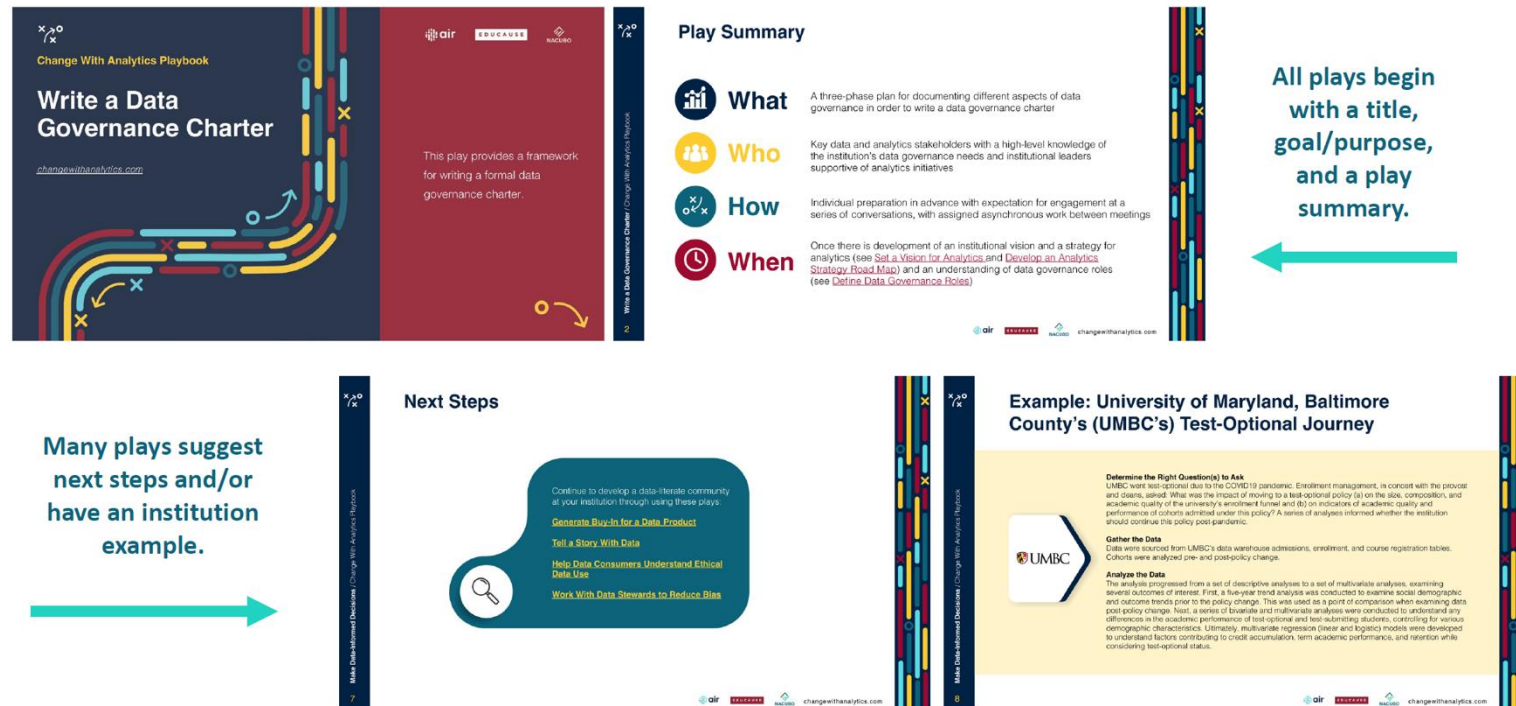
- Make Data-Informed Decisions
- Tell a Story With Data
- Help Data Consumers Understand Ethical Data Use
- Work With Data Stewards to Reduce Bias

Plays Included in All Sections

- Assemble and Manage Teams for Analytics Initiatives
- Executive Sponsor Checklist
- Explore Typical Analytics Job Responsibilities

A Playbook for Success

Change With Analytics Playbook Features



All plays begin with a title, goal/purpose, and a play summary.

Many plays suggest next steps and/or have an institution example.

AI and the Future of Higher Education

Transformative Opportunities in AI Strategy

IT Strategy Advisory Services

AI Breaks the Mold of Technology Adoption

ChatGPT's User Base Grew Much Faster Than Other Tech Breakthroughs

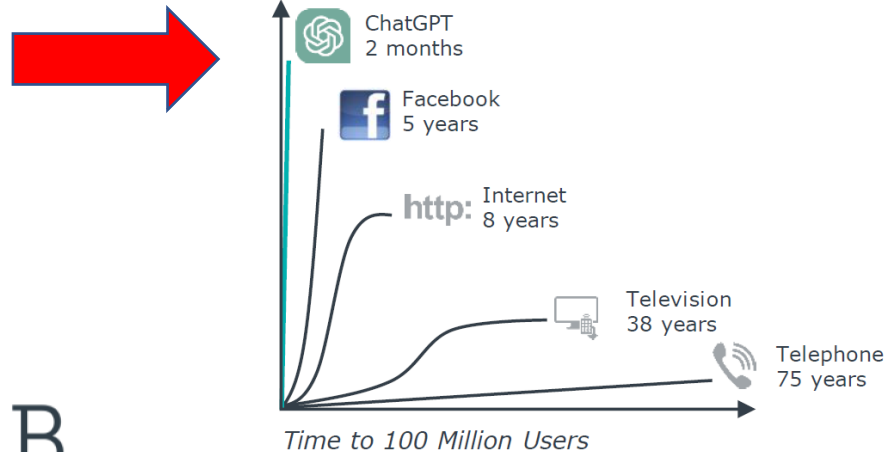
What is Generative AI?

Latest development in AI that refers to deep-learning models that can **generate high-quality text, images, and other content** based on the data they were trained on.¹



ChatGPT's Meteoric Adoption Rate Sets Historical Precedent

Time to 100M Users By Technology



Generative AI Reaches Inflection Point Due to Unique Developments

► Accessible and User-Friendly

Web-based access allows anyone to use AI via everyday devices like PCs and phones. Users can use simple text prompts to deliver commands and process outputs.

► Trained on Vast Knowledge Base

Models are trained on large sets of data (e.g., books, web texts, and articles from billions of Internet webpages).

► Generates New, Human-like Content

Tools can generate new, creative content across domains (e.g., text, images, software, music, video) that is often indistinguishable from human outputs.

OpenAI
 DeepMind
 Stable Diffusion
 xkool
 DeepL

AI's Potential to Inflect to Key Goals in HE Sector

3

Increase Financial Sustainability

I.e., Reduce Costs

Long-Term Vision: Scaled Productivity Gains

Deploy AI applications across the enterprise at a scale that eliminates low-value activities, enables a greater output of work, and ultimately reduces operating costs.

More Immediate Vision: Individual or Team-Based Productivity Gains

Pinpoint areas where AI enables greater individual or team efficiency, laying groundwork for wider adoption.

Boosting Administrative Efficiency with AI

Increase Competitiveness

I.e., Grow Revenue

Long-Term Vision: Building an AI University

Faculty embrace AI and incorporate it into curriculum and research applications; prospective students seek out the institution as desired destination to prepare for an AI future.

More Immediate Vision: Enhancing Faculty (and Student) AI Literacy

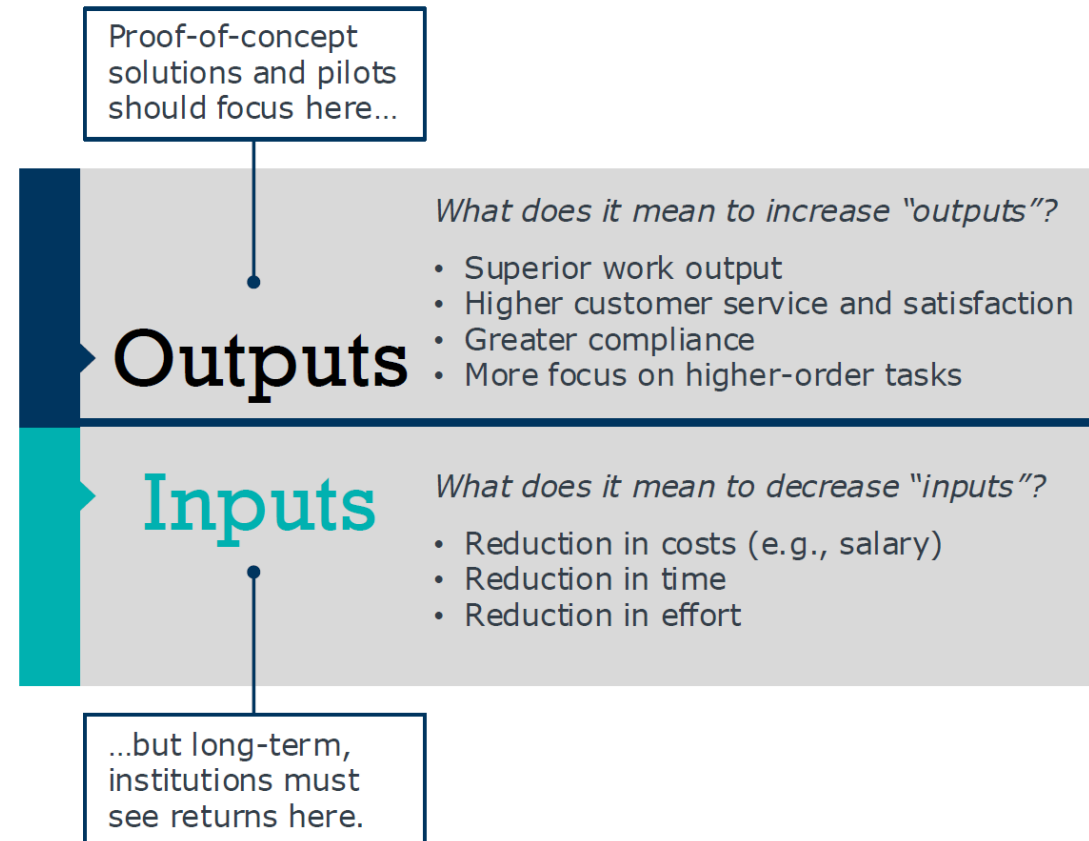
Enable small-scale experimentation with AI as pedagogical tool as well as force transforming curriculum.

Engaging the Faculty with AI

Take an Expansive Definition of ROI



Productivity Gains Come from Reducing Input *and* Growing Output





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Artificial Intelligence

The rapid rise of artificial intelligence (AI) tools and advancements has drawn a host of opportunities, challenges, and questions. As AI makes its way into higher education, what does it mean to leverage AI for business and finance operations? Below we highlight NACUBO resources that provide advice and insights for colleges and universities navigating the use of AI.

Artificial Intelligence

The rapid rise of artificial intelligence (AI) tools and advancements has drawn a host of opportunities, challenges, and questions. As AI makes its way into higher education, what does it mean to leverage AI for business and finance operations? Below we highlight NACUBO resources that provide advice and insights for colleges and universities navigating the use of AI.



5 Things Business Officers Can Do to Support AI Use

NACUBO conducted a series of focus groups to learn about use cases, challenges, and best practices for leveraging AI. Over the course of six focus groups, thoughts were shared by 19 of NACUBO's corporate members and 10 institutional members.

[Learn More](#)



Most Higher Ed Professionals Are Using AI At Work, New Survey Finds

A new report from EDUCAUSE, which includes NACUBO member feedback, finds opportunity for enhanced AI strategies at institutions.

[Learn More](#)



Cautious Optimism: AI Integration on College Campuses

In this NACUBO In Brief podcast, experts discuss how AI is moving from experimentation to everyday practice across campus operations. They explore new survey insights, emerging use cases, and the opportunities and risks AI presents.

[Access Now](#)



NACUBO Members Weigh In On How They Use AI

An informal flash poll conducted by NACUBO in October 2024 revealed that more than one third of NACUBO members surveyed said their institutions are already using artificial intelligence (AI) to support business and finance functions.



Actionable Insights for AI Series 2026

May 12–28, 2026 | Online

NACUBO's new online professional development experience is designed specifically for higher education business officers who are navigating the opportunities—and responsibilities—of AI adoption.



Online Data, Analytics, and AI Community

NACUBO's Online Data, Analytics, and AI Community is a space for members to pose questions, share resources, and discuss developments about higher education data, analytics, and AI. We encourage thoughtful discussions, collaborative problem-solving, and the exchange of diverse opinions and ideas.

Leveraging AI for Higher Ed's Business Office



What Is AI?

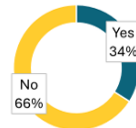
AI is technology that is capable of imitating human qualities, like learning, decision-making, and problem-solving, to create outputs that resemble something a person could create. [1]

Background

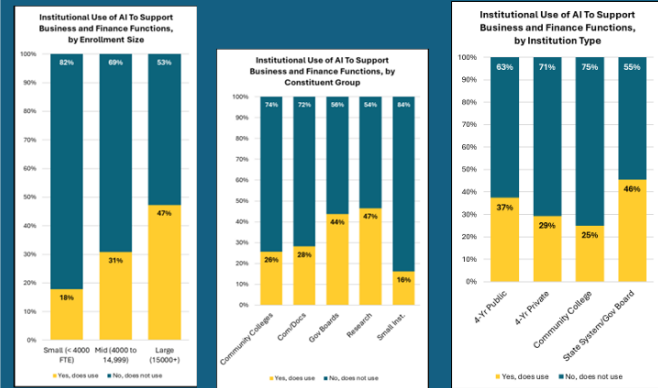
In October 2024, more than **700** NACUBO members responded to a flash poll asking them *if* and *how* they were using AI for business and finance at their institutions.

[Click here to learn more](#)

Does Your Institution Use AI to Support Business and Finance Functions?



How Does AI Use to Support Business and Finance Operations Vary Across Different Types of Institutions?



How Are Institutions Using AI to Support Business and Finance Operations?

To learn more about the use of AI in higher education business offices, NACUBO conducted a series of focus groups with 19 corporate members and 10 institutional members. Participants shared use cases, discussed challenges, and offered perspectives on best practices for leveraging AI. Findings show recurring themes and actionable advice to help higher education professionals strategically use AI to support business, finance, and institutional operations.

[Click here to learn more](#)

Financial Operations and Planning

- Automate or enhance revenue and expense reporting and forecasting
- Augment or automate procurement processes
- Evaluate proposals from potential new business partners/vendors
- Automate or enhance fraud detection

Data and Analytics

- Enhance data reporting and standards (e.g., data governance)
- Integrate the use of external data for decision-making
- Automate routine data processes (e.g., data entry, accounting, bookkeeping)

Student Services

- Enhance student financial aid, enrollment, and outcomes forecasting
- Use chatbots or other self-service technology to respond to student questions/needs
- Develop more engaging and effective student messaging
- Enhance or automate student messaging

Administrative and Office Support

- Enhance strategic planning
- Assist with meeting scheduling, note-taking, and facilitation
- Augment the creation of reports, presentations, or other communications
- Generation of standard operating procedures (SOPs)

What Challenges Do Institutions Encounter? How Do We Tackle Them?



The Road Ahead

AI continually improves upon existing tools and unveils more breakthroughs. Since the publication of "5 Things Business Officers Can Do to Support AI Use" and the results from NACUBO's flash poll, a laundry list of developments has come about. From vast improvements to video generation, chatbots, and coding assistants, colleges and universities can expect to find new and innovative opportunities to embed AI in their business and finance functions.

No matter what the future holds for AI, building AI knowledge, focusing AI use on mission, collaborating and communicating, developing and refining policies, and being mindful of cultural receptiveness to change will endure as best practices.

Poster Authors

Jackie Agustin
manager, analytics and research

Lindsay Wayt
senior director, business intelligence

[1] Kavalakoglu, E. & Stryker, C. (August 9, 2024) What is artificial intelligence (AI)? IBM. Retrieved January 28, 2025, from <https://www.ibm.com/think/topics/artificial-intelligence>



NACUBO

Leading the Future of AI in Higher Education: Finance Leaders Chart a Strategic Path Forward

OCTOBER 2025

By Vinay Bhaskara, Evelyn Shi,
and Andrew Chin
CollegeVine



Executive Summary

Higher-education finance leaders are at a pivotal moment, shaping how artificial intelligence can serve the mission of colleges and universities. In conversations with CFOs and VPs of Finance, nearly every leader described AI as an essential part of higher education's future. Adoption is still in its early stages, but finance leaders are carefully laying the groundwork for responsible, sustainable innovation.

Rather than rushing to deploy untested tools, institutions are taking a thoughtful, people-centered approach: balancing stewardship of resources, equity, and institutional culture. Leaders emphasized that success depends on clear communication, low-risk experimentation, and partnerships that reflect higher education's values.

AI can be a transformative enabler for higher education operations. Successful implementation will require a people-centered approach grounded in clear communication, low-risk experimentation, and strategic partnerships with trusted experts.



Higher Ed Faces Growing Financial Pressures That Require Innovation

1. External Headwinds

American higher education stands at a moment of profound transformation, driven by shifts in enrollment patterns, funding volatility, regulatory pressures, and evolving student expectations. Uncertainty in these areas can make planning complex, but many leaders see opportunities for innovation amid this change.



2. Internal Pressures

Internally, colleges and universities across the U.S. face [rising costs](#). For example, the American Council of Trustees and Alumni (ACTA) found that [spending on administration](#) per student increased by 61% between 1993 and 2007. Administrative costs now account for nearly a quarter of total spending, according to [Department of Education data](#).

In the [2025 Inside Higher Ed CBO Survey](#), among CBOs who anticipated their institution would be worse off financially in the coming year, “non-labor operating costs” and “labor costs” were the second-most frequently cited reasons why, behind concerns about federal funding.

As spending on administrative costs, non-labor operating costs, and workforce costs (e.g., offering competitive salaries, increasing cost of benefits) increases, colleges and universities will need to find innovative ways to gain efficiencies. In our interviews, finance leaders pointed to manual, repetitive workflows (e.g., data cleanup, reporting, form processing) as drains on staff time and capacity.



Leading the Future of AI in Higher Education: Finance Leaders Chart a Strategic Path Forward



Where AI Can Add Value Today

Administrative Automation: A Clear Starting Point

The most immediate opportunities for AI lie in automating repetitive administrative tasks. Finance leaders identified student inquiries, data reconciliation, and form processing as areas where AI can reduce burdens on staff while improving service quality.

Other Real-world Use Cases

In our interviews, finance leaders cited several common key opportunities for AI transformation.

- **Student and parent inquiries:** AI agents can respond to routine payment questions, freeing staff from complex cases.
- **Data reconciliation and reporting:** Finance teams spend significant time cleaning and structuring data. AI can automate these tasks.
- **Form processing and approvals:** As an AVP at a state college system described many institutions managing many forms and approvals see delays and confusion. AI can streamline workflows and improve accuracy.

The Impact of AI on Work in Higher Education



Credit: Canva Magic Studio AI

EDUCAUSE presents this report on the impacts AI is having on the work of higher education, an effort conducted in partnership with [AIR](#), [NACUBO](#), and [CUPA-HR](#). In this research, we summarize work-related institutional AI strategies, policies, and guidelines; the risks, opportunities, and challenges associated with using AI for work in higher education; and specific examples of how staff and faculty use—and want to use—AI for work. The [survey](#) for this project was disseminated from September 29 to October 13, 2025, resulting in 1,960 responses meeting [inclusion criteria](#).



Key Findings

Strategies, Policies, and Guidelines

- Most respondents (81%) feel enthusiasm or a mix of caution and enthusiasm toward AI. Just 17% said they feel cautious or very cautious.
- Most respondents' institutions (92%) have a work-related AI strategy. The most common elements of those strategies are piloting AI tools, evaluating both opportunities and risks, encouraging staff and faculty to use AI tools, and creating policies and guidelines.
- Among respondents who said their institution's work-related AI strategy includes increasing workforce skills, a majority (69%) said they are doing so primarily by upskilling or reskilling existing staff and faculty.
- Just 13% of respondents said their institution is measuring the return on investment (ROI) for work-related AI tools, pointing to a significant opportunity for institutions to embark on such work.
- Though nearly all respondents (94%) said they have used AI tools for work within the past six months, only 54% of respondents said that they are aware of policies and guidelines meant to guide such use. This gap could have serious consequences for data privacy and cybersecurity, data-informed decision making, digital accessibility, and more.

Key Findings

Risks, Opportunities, and Challenges

- More than two-thirds of respondents (67%) identified six or more risks as "urgent," indicating that most respondents are concerned about a breadth of risks associated with using AI. The three most-selected risks are an increase in misinformation, the use of data without consent, and a loss of fundamental skills requiring independent thought.
- Similarly, more than two-thirds of respondents (67%) identified five or more opportunities as "most promising," indicating that most respondents are also optimistic about a range of opportunities for using AI. The three most-selected opportunities are automating repetitive processes, offloading administrative burdens and mundane tasks, and analyzing large datasets.
- The three most-selected challenges associated with using AI tools for work are AI's pace of change, lack of AI expertise, and lack of best practices.

Use Cases

- Among respondents who have recently used AI tools for work-related tasks, a majority (73%) reported that they do so either daily or weekly.
- Among respondents who have *not* recently used AI tools for work-related tasks, the most common reasons they gave were that they have not wanted to (58%) or have not needed to (50%).
- Just 11% of respondents reported that they are required to use AI tools for work, while 64% reported that not only are they not required to use AI tools for work but they do not expect to be required to do so in the near future
- A majority of all respondents (86%) indicated that they want to use or continue to use AI tools in the future.
- From a list of 30 potential work-related uses of AI tools, more than half of respondents (54%) said they had used AI tools for eight or more types of tasks in the past six months.
- Most respondents have at least some access to AI tools for work through their institution. Just 10% indicated that their institution does not provide access to any of the AI tools they want to use for work.
- More than half of respondents (56%) reported that for work-related tasks, they have used AI tools that are not provided by their institutions. Similar to findings about lack of awareness of policies and guidelines, this insight points to another area of AI-related risk for institutions.

Key Findings



If you could solve one institutional challenge using better analytics or AI over the next three years, what would it be?

Communicating Financial Data



Telling the Story

- ▶ Know your audience – “who”
- ▶ Know your goal – what is your purpose/objective
- ▶ Focus on the narrative – tell the story
- ▶ Utilize visuals, focus on key points
- ▶ Function over format – prioritize needs
- ▶ Summarize key points
- ▶ Follow-up – did you meet the needs



Understanding the data

Build your data knowledge

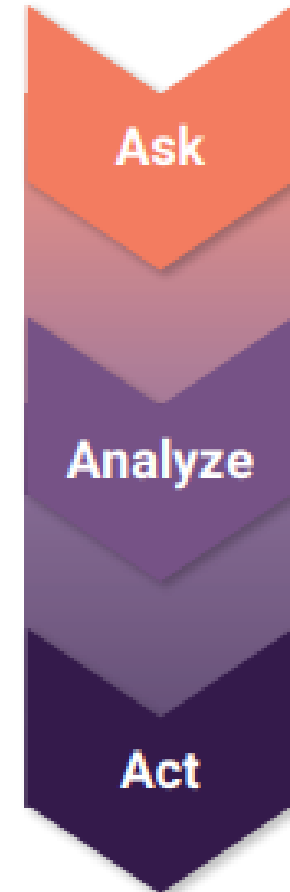
- ▶ Be inquisitive
- ▶ What data is available
- ▶ Is data reliable

Ask and refine questions

- ▶ Do we have the right data
- ▶ What else is needed
- ▶ What do we not know

Act and reflect

- ▶ Assessment
- ▶ Feedback



1 Setting & Hook

Background on current situation, character(s) & hook

2 Rising Insights

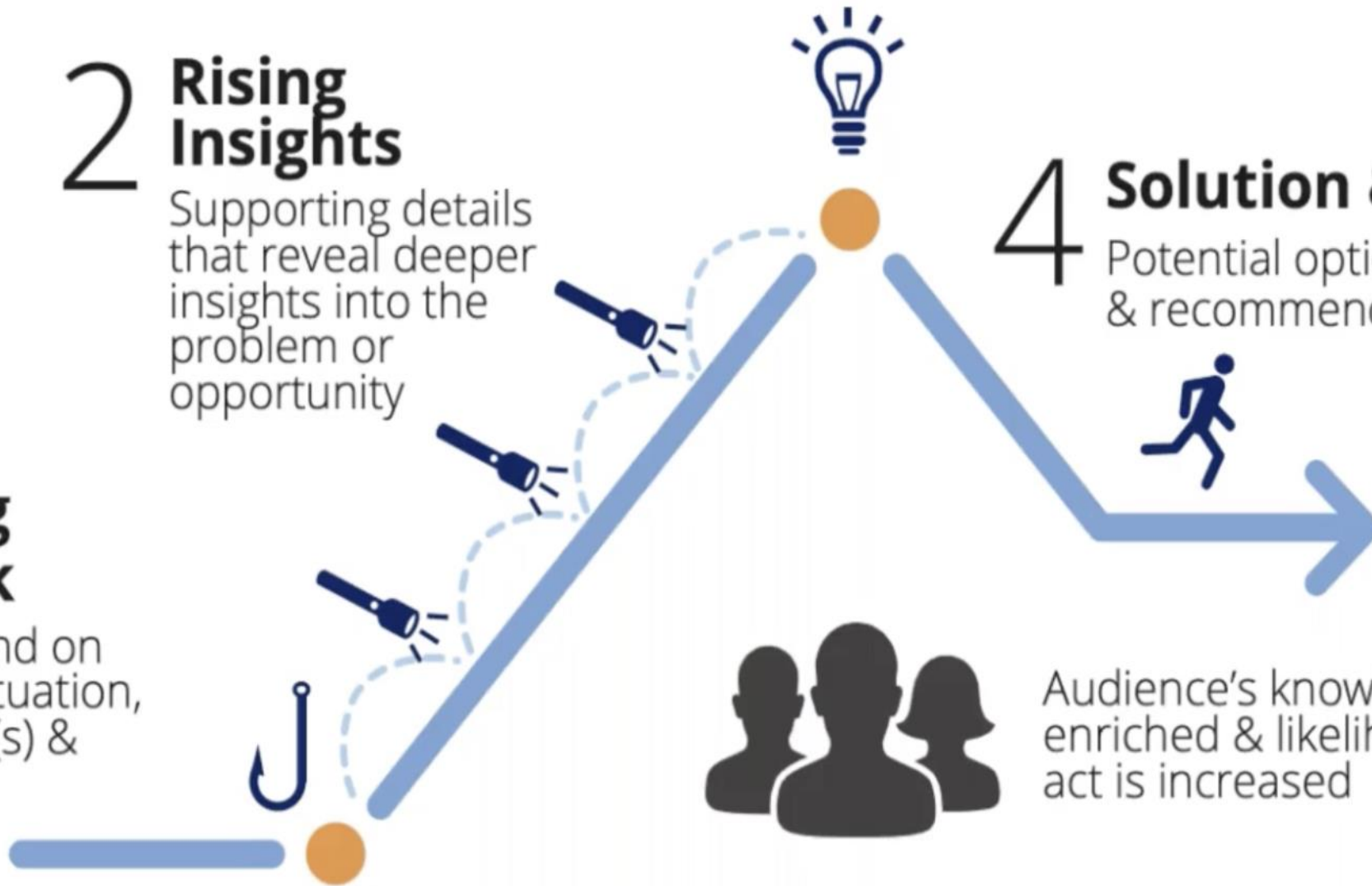
Supporting details that reveal deeper insights into the problem or opportunity

3 Aha Moment

Major finding or central insight

4 Solution & Next Steps

Potential options & recommendation



Audience's knowledge is enriched & likelihood to act is increased

What To Avoid

- ▶ Not preparing properly
- ▶ Not knowing the audience
- ▶ Lack of organization
- ▶ Visuals that distract
- ▶ Too much content
- ▶ Lack of confidence
- ▶ Poor delivery, not engaging
- ▶ Presentation purpose not clear
- ▶ Not properly concluding presentation



Steps to Begin Your Analytics Journey

- Hire a data analyst
- Establish foundational data skills
- Get data in front of people
- Communicate responsibilities



Steps to Begin Your Analytics Journey

- Utilize students, where appropriate
- Be curious and ask questions
- Ensure sponsorship by senior leaders and broad participation among subject matter experts
- Leverage existing data governance processes



Steps to Begin Your Analytics Journey

- Identify digital resources that fit with the IT ecosystem
- Embed data analytics use into specific jobs and invest in people
- Tell a story
- Association resources





2026 Planning, Budgeting, and Analytics Forum

October 5–7, 2026 | Coronado, CA (San Diego)

[Register Now](#)

2026 Planning, Budgeting, and Analytics Forum (Online)

October 5–7, 2026 | Online

[Register Now](#)



Online
Learning

Talk About Data
and Analytics

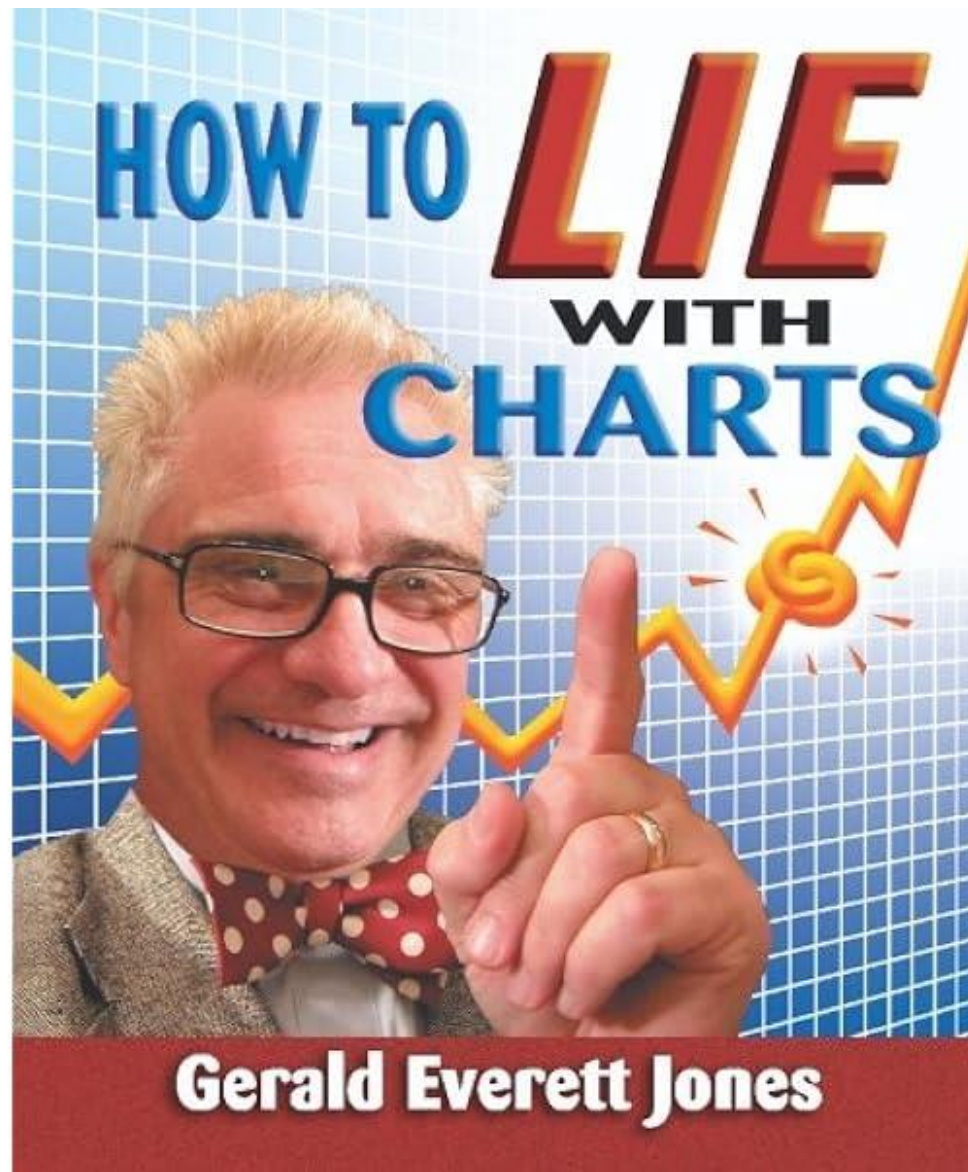


2026 SACUBO Fall Conference

Save the date! Join us in Myrtle Beach, South Carolina on November 11-13, 2026 for the 2026 Fall Conference!

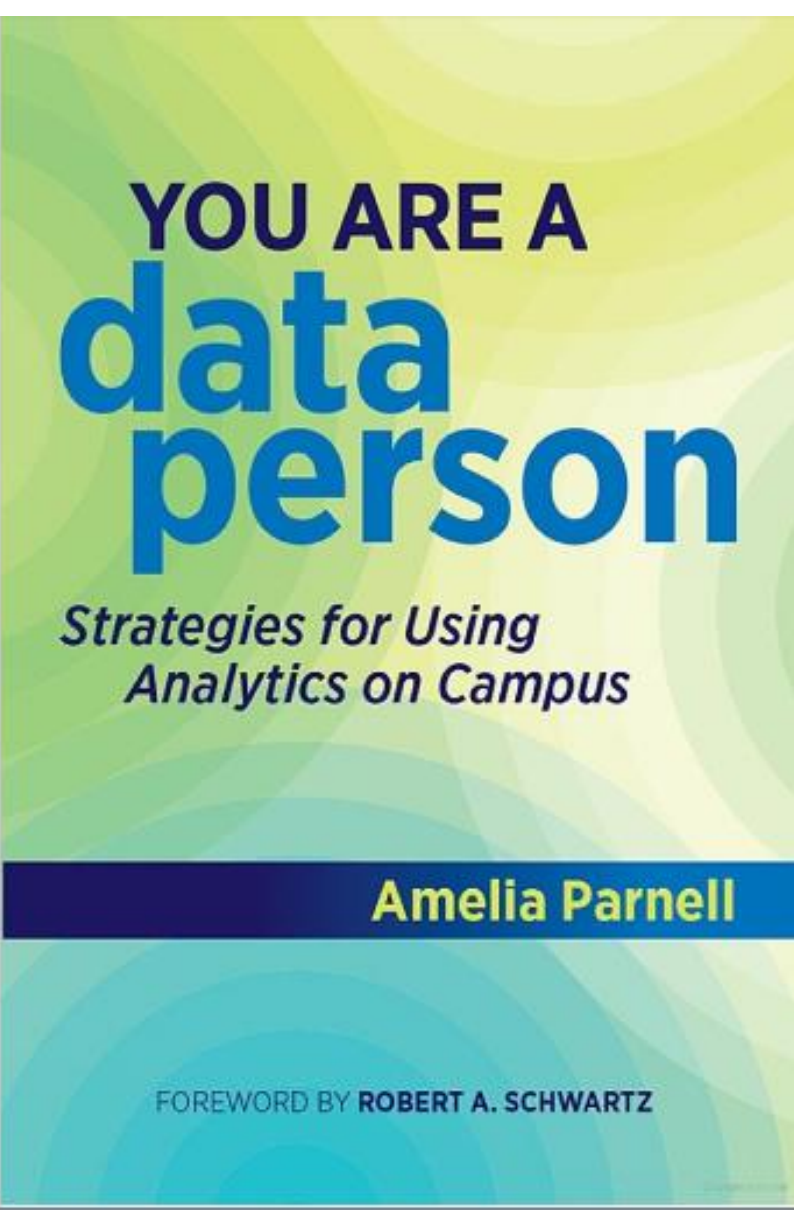
More information coming soon.





Data Identity Framework

- Curiosity and Inquiry
- Research and Analysis
- Communication and Consultation
- Campus Context
- Industry Context
- Strategy and Planning



YOU ARE A data person

*Strategies for Using
Analytics on Campus*

Amelia Parnell

FOREWORD BY ROBERT A. SCHWARTZ

Resources

- <https://www.nacubo.org/Topics/Analytics>
- <https://changewithanalytics.com/>
- Richardson, Teeter, Terrell. *Data Analytics for Accounting 2nd Edition*. New York, NY: McGraw-Hill Education, 2021.
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