Balance of Trade Dashboard

Content

This dashboard provides detail down to the student level documenting Balance of Trade inflows and outflows from Fall 2016 (fiscal 2017) forward. Dollars transferred and the class enrollment units (points) that generate them are displayed. An extract from the UDW+ Budget Summary data shows the amounts posted to FAME.

The complementary Cross Enrollment dashboard provides university-wide data and a comparison of a school's in- and outflows.

Balance of Trade Model

NYU's Balance of Trade model transfers tuition revenue between schools when students take courses outside of their home school. Tuition revenue flows into a school when it teaches students from other schools; tuition revenue flows out when the school's students take courses other schools. The tuition revenue generated by each student is calculated from (i) the number of units taken, (ii) standard per-unit tuition value for undergraduate and graduate students, and (iii) a Balance of Trade allocation rule.

Most Balance of Trade flows are based on units (points) taken. Most Global Programs Balance of Trade is based on headcount and shown on a separate dashboard page. See details below.

The Balance of Trade Rules and Values dashboard page shows the BoT rules and the standard tuition amounts used to calculate tuition revenue each term. The rules specify the percent of calculated tuition allocated to the teaching school, the student's school, and—in some cases—the Provost. For example, the tuition for an Arts and Science undergraduate student taking a four unit course in Steinhardt in Fall 2016 would be calculated as 4 units x $1,373 per unit = $5,492, and would be allocated 70% to Steinhardt (the teaching school) and 30% to Arts and Science (the student school). Balance of Trade would include $3,844 ($5,492 * .7) in BoT In for Steinhardt and BoT Out for Arts and Science.

Data

Class enrollment data. Balance of Trade in- and outflow calculations are based on class enrollment at the enrollment census. Because changes after a term's census are not incorporated, enrollment counts may differ from those in the Student Academic Management Dashboard and other current data derived from the UDW+ Class Enrollment subject area.

The data for a term will typically become available two to four weeks after the census date. The fall and spring census are taken after 15 class days; the summer census is taken in week 9 of classes. There is currently no Balance of Trade in the January term.

Financial data. Data for Spring in New York and Fall in New York are currently included within the regular Fall and Spring BoT chartfields and will remain there until the process can be updated to correctly allocate to those chartfields. Therefore those chartfields must be included when comparing BoT data to Budget Summary.

Unit counts. The data on this dashboard are limited to course activity that generates a Balance of Trade dollar transfer. As a result the number of units (points) shown omits activity subject to Balance of Trade rules for which no dollars are transferred. For example, when a Tandon graduate student takes a course in another school 100% of the revenue is allocated to the student school. The units associated with that activity are excluded from the Balance of Trade dashboard. Those units are included on the Cross Enrollment dashboard.

Data Access and Use

Consistent with university policy on student data access anyone with access to the Balance of Trade Dashboard can see class-enrollment based data for all schools. Access to the Budget Summary extract is controlled by chartfield. Use of the student data must comply with FERPA policy.

Data Definitions

School. The dashboard displays Balance of Trade flows by the entities between which BoT dollars flow. These are identified by Academic Groups defined in Campus Solutions modified to reflect BoT transfer rules. The school grouping do not always correlate with the school classification on other UDW+ dashboards.

- The BoT Dashboard combines the College of Arts and Science and Graduate School of Arts and Science; Stern School of Business-Graduate Division and Stern School of Business Undergraduate; and Wagner Graduate School or Public Service and Wagner School of Public Service-Undergraduate.
- The Academic Group Faculty of Arts and Science (UF) is renamed to Liberal Studies.
- The BoT Dashboard identifies all other schools by the adjusted Academic Group.

Crosslisted/combined classes. In the Balance of Trade model all activity in cross-listed/combined sections is attributed to the Academic Group and course level of the sponsor section. Because of this assignment there are cases where BoT outflow appears to be attributed to a course in the student's school. That occurs when the course is cross-listed and the sponsor section is in another school.
**Technical data notes:** The data for unit-based Balance of Trade calculations are selected as follows:

- Include only students with Class Enrollment Status = Enrolled at census.
- Include only enrollment in Enrollment Sections (not subsections such as labs or recitations associated with lecture classes).
- Exclude Academic Group Code = AC, CE
- Exclude Career Code = MEDS, CENC, DECE
- Include only Student Category Code = NY, CONP, AD, SH (SAGL and SASB have their own specific tabs in the dashboard.)
- The Academic Group exclusion omits enrollment activity in the Administrative College (AC) which is used by the Registrar for technical adjustments, and School of Professional Studies (CE) courses. CE course activity is included in the Cross Enrollment Dashboard to provide a more complete accounting of inter-school activity.
- The Career Code condition excludes students in Medicine (MEDS), College of Dentistry Continuing Education (DENC), and Continuing Education/Non Credit (CENC) because they do not generate Balance of Trade flows.
- Exclude courses that do not have an Academic Group associated with them. (These courses are provided to the Budget Office, in an exception report, for review.)
- The Student Category Code condition includes in BoT only students in New York/Washington Square (NY, CONP), Abu Dhabi (AD), and Shanghai (SH). Global Exchange, and Consortium students are excluded.
- Global Program Study Abroad students whose BoT is based on headcount rather than class enrollment are shown on a separate dashboard. See details below.
- Study Abroad School Based students that do not have a Global Programs Study Agreement Code, nor a Global Network University (GNU) code are shown on a separate dashboard.

### Dashboard Pages

**Balance of Trade Summary.** This page summarizes for a school the BoT inflow and outflow amounts calculated from course and student detail by Organization, Account, Term and Fiscal Year, and compares the results to Balance of Trade amounts in FAME summarized in Budget Summary reporting. A school must be selected; one or more fiscal years may be selected. To be comparable to the BoT calculated from course-enrollment data the Budget Summary amounts do not include Global Balance of Trade which is calculated based on headcount instead of course enrollment. However, it is important to note that the BoT calculated from course-enrollment data does not include the GNU BoT. GNU BoT is calculated separately on the GNU tab.

**BoT In.** The tables on this page summarize a school's BoT inflow headcount, units and dollars. Those metrics are aggregated by the school from which students came and the courses in which they enrolled. Drill to detail is available to support all numbers displayed in blue. Course-level detail shows the derivation of the BoT tuition revenue amount from units taken and the applicable BoT rule and unit value. Student detail is also provided.

**BoT In Detail.** This page documents with course-level detail the amounts included in each BoT In account. The default view provides a summary by course. Detail by rule and a summary by the student's school are also provided.

**BoT Out.** This page parallels BoT In but provides slightly different data because outflow activity is dispersed across many more courses than inflow. The detail on the right includes options of a summary of outflow headcount, units and dollars by course subject, and headcount by course subject and student level.

**BoT Out Detail.** This page documents with course-level detail the amounts included in each BoT Out account. The default view shows detail by student school course. The alternative view includes the BoT rule applicable to each transfer.

**Student Detail.** This page facilitates exporting student-level detail. Samples of BoT IN and BoT Out are provided. The use of extracted data must comply with FERPA regulations and should not be emailed.

**Trend Data.** This page provides course-level BoT In- and Outflow data by term to show how headcount, units and dollars have changed over time.

**Global Balance of Trade.** In the Balance of Trade model there are three categories of study away students:

- Headcount-Based Global BoT (Global Balance of Trade page)
- Unit-Based Global BoT for Abu Dhabi and Shanghai students (Global Balance of Trade page)
- Unit-Based Global BoT for Global Network University Students (GNU Balance of Trade page)

Global balance of trade does not include visiting students at study away sites who are not otherwise enrolled at NYU. Those students do not generate BoT dollars and are excluded from the dashboard. Students enrolled in school-based study away programs are governed by the regular course-based BoT rule that covers their home school/teaching school combination.

Known Issue: For some users the Global page loads with the same headcount number in every cell. Clearing the cache in your browser may correct the problem (Press Ctrl-Shift-Delete to clear your cache). We are currently working with ITS on a general solution.

**Headcount-Based Global BoT.** Most students in NYU Global Programs are excluded from course-enrollment-based calculations and incorporated in the BoT model based on headcount and standard per head tuition amounts. This page shows the distribution of those students by the student's school and study away site. The dashboard page shows the derivation of BoT revenue from standard headcount tuition amounts and the distribution between Global Programs (45%), the student's school (40%), and the Provost (15%). Drill to detail is available for all blue numbers.

**Unit-Based Global BoT for Abu Dhabi and Shanghai students.** When Abu Dhabi or Shanghai students study away at locations other than Abu Dhabi, Shanghai or New York they generate unit-based balance of trade. 70% of the unit-based tuition revenue goes to the teaching school (study away site) and 30% to the student school.
Global Network University Balance of Trade. The balance of trade activity of students studying away within NYU's three portal campuses--Abu Dhabi, Shanghai and New York--is shown on a separate page. The tuition allocation is unit-based, split 70% to the teaching school and 30% to the student’s home school. Alternative views of the data show relationships between the teaching school and the student's school.

Study Abroad School Based (SASCH). This page displays activity regarding students that have a student category code = SASB, and have a study agreement code that is NOT associated with Global Programs or GNU.

- Abu Dhabi and Shanghai SASCH tuition allocation is unit-based, split 70% to the teaching school and 30% to the student's home school. Alternative views show relationships between the teaching school and the student’s school.
- Washington Square SASCH tuition allocation is also unit based, but 100% goes to the teaching school.

BoT Rules and Unit Values

The top of this page displays the rules of the Balance of Trade model, the allocation each rule allots to the teaching school and the student's school, and the standard per-unit tuition amounts used to calculate BoT in each term. The BoTtom of the page shows the relative contribution of each rule by summarizing BoT Outflow by rule in the most recent Fall term.