Defined best practices, developed meaningful SAR metrics and established historical performance data. Methodology was charted to extract relevant, robust and accurate information from Brandman ERP (Ellucian Banner), along with the ability to compare it to historical benchmarks.

Developed comprehensive, real time ERP integrated SAR dashboard analytics which displays and maintains key SAR metrics for all 26 campuses and by region. The dashboard provides complex graphical and formulaic information and a clear path of performance to senior leadership, management and campus directors.

Developed a purpose built, automated and integrated collections system extrapolated into Brandman business practices retrieving data from various modules within ERP system including Student Records, Financial Aid, Accounts Receivable and the General Ledger. The system displays complex, multifaceted information and is capable of posting a multitude of mass transactional entries into the ERP in real time, as well as generating mass communications to students, notes, and updating the ERP with relevant indicators seamlessly with minimal efforts.

What makes this effort Innovative?

Presenting financial data in a strategic and meaningful manner, focusing on reducing outstanding SAR balances across 26 unique offsite campuses, as well as providing structured Accounts Receivable management throughout the entire student enrollment cycle is a formidable challenge. The true innovation comes from:

- Extracting raw data from Brandman’s ERP and other systems in real time, and manipulating it seamlessly into meaningful performance indicators.
- Developing a greater understanding of our primary revenue source and monitoring a dramatic positive impact across the organization.
- Establishing easy, intuitive, and automated access to relevant data as the cornerstone of successful overall SAR management.
- Enhancing strategic decision making process and making it informed, factual and rapid, based on historical and current performance metrics.

What impact did the effort have on the institution?

The advancements and introduction of performance indicators has had a profound impact on Brandman’s financial well-being, as evidenced in both increased cash balances and decreased SAR balances. As an additional material benefit, automations have resulted in significant reduction of ancillary manual efforts, the elimination of overtime, and has removed the need to hire additional staff.

Highlights illustrating the improvements during the three year period as of May 1, 2017:
- SAR balances older than 210 days decreased from $4.5M to $376K
- The average number of days to receive a student payment decreased from 74 to 24 days
- Unapplied student balances decreased by 80% from $1.2M to $172K
- Percentages and balances uncollected prior to external collections reduced from 4% to 1.2% per academic year
- The percentage of student payments received before the due date increased from 58% to 80%
- ACH student participation increased from 51% to 81%, reducing staff time, manual efforts and cost required to process paper payments
- Implemented complex set of of policy, procedural and technological changes and enhancements to improve receivables indicators