

# Modernization and Reporting

## NCDPI SBS Division

July 25, 2024

# SBS Data Analytics Team

**Nathan Craver**  
*Data Analytics Manager*

**Michael Ray**  
*Business Analyst*

**Jane Seo**  
*Data Analytics Team Lead*

**Susan Charlton**  
*Business Analyst*

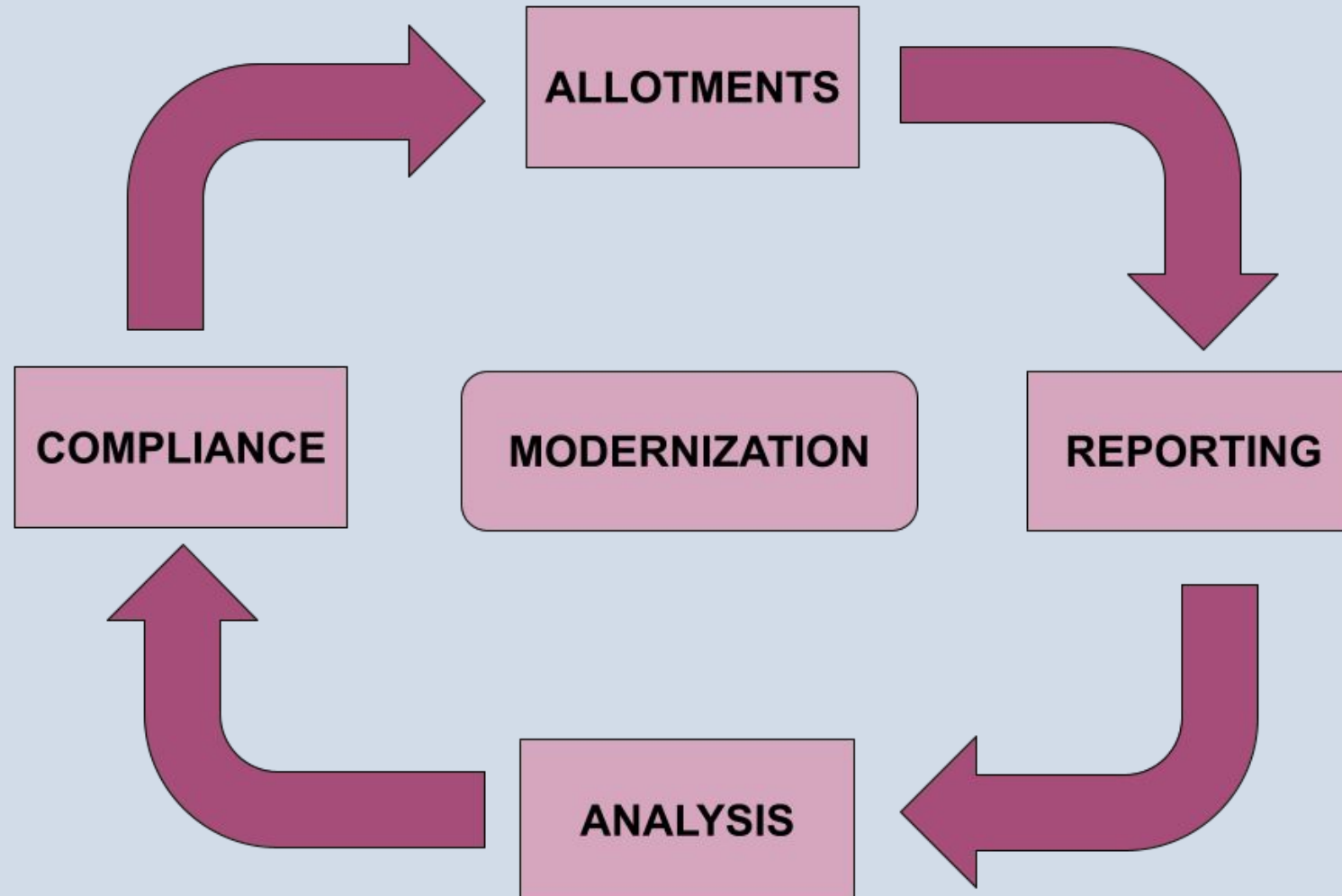
**Dominique Thompson**  
*Data Visualization Analyst*

**David Cauthorn**  
*Business Analyst*

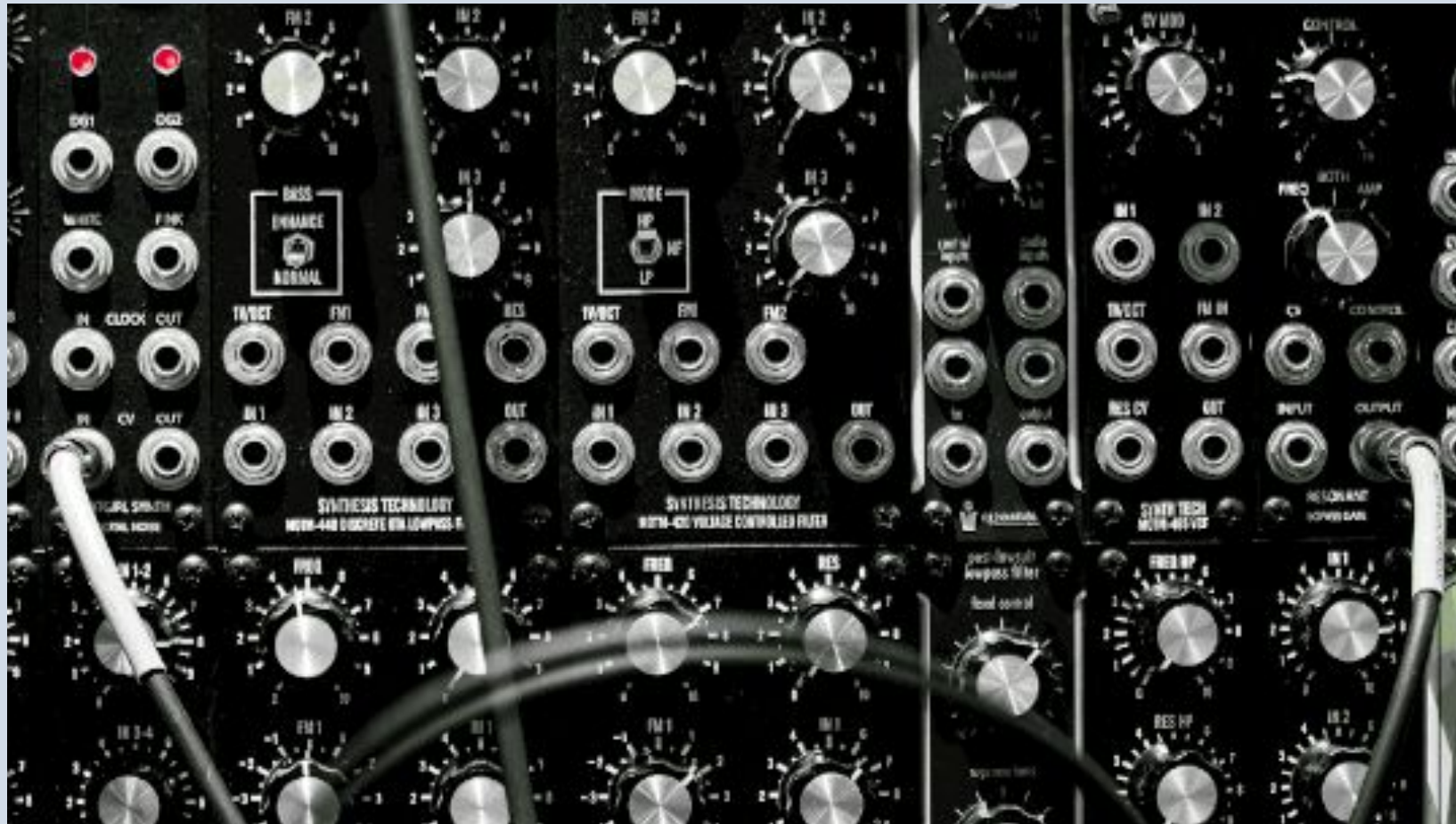
# SCHOOL BUSINESS SERVICES

- Allotments
  - Allocates the funding to all PSUs
- Analysis
  - Provides analysis and reports to internal partners, OSBM, General Assembly, the USED, research partners, and to school districts
- Compliance
  - Ensures PSUs are fiscally compliant with any state and federal regulations
- Reporting
  - Collects, organizes, and validates UERS data files

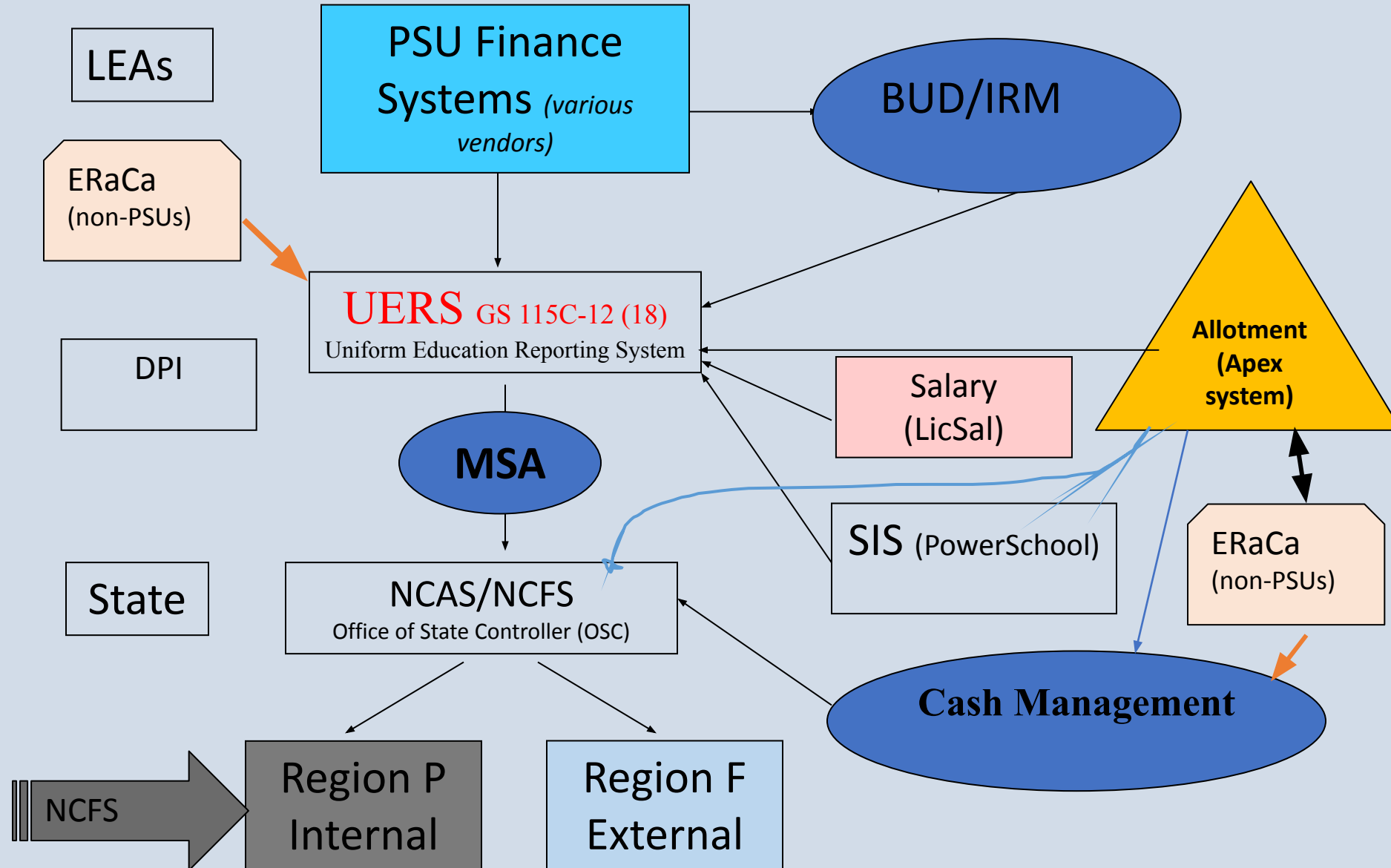
# School Business Services



# Old Process



# Previous Setup



# Turn and Talk:

If the previous image represents the current process for collecting and reporting data, what would it look like after modernization?

What would be some characteristics or some upgrades you would expect to see in a modernized data collection and reporting system?

# Goals:

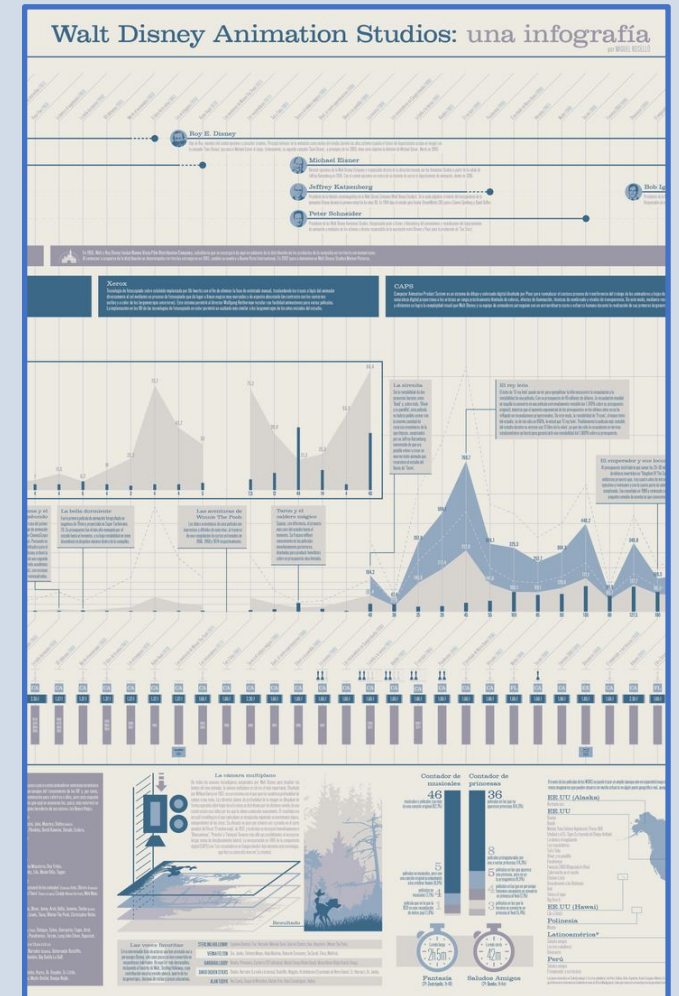


- Provide data updates in real time
- Automation
- Simplify
- Increase agility
- Improve efficiency
- Improve accuracy
- Meet stakeholder needs



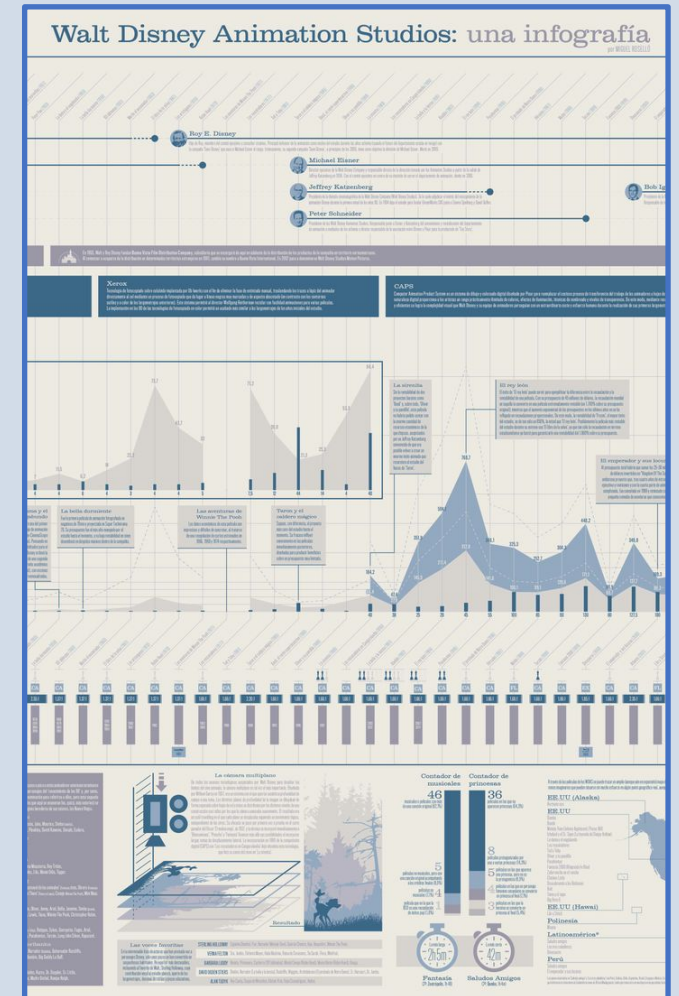
# Modernization

- Replace MSA – Greenscreen System
- Replace Mainframe Cash Process for getting PSUs their cash from appropriated funds
- Upgrade reports and analytics to take advantage of modern technology
- Enable SBS to meet all reporting, analysis, and transactional responsibilities
- Enable NCDPI to respond dynamically to rapidly changing environments

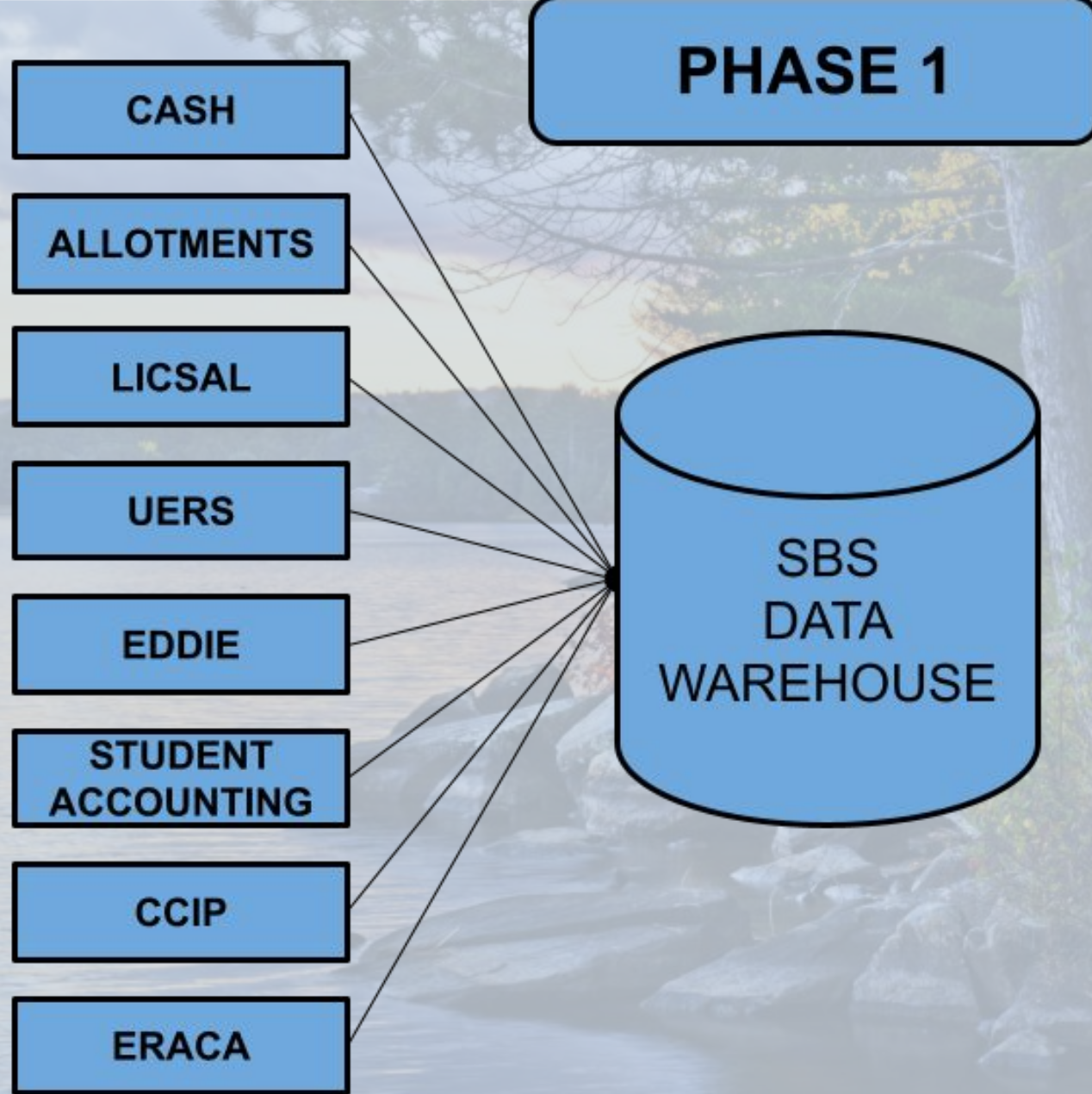


# Modernization

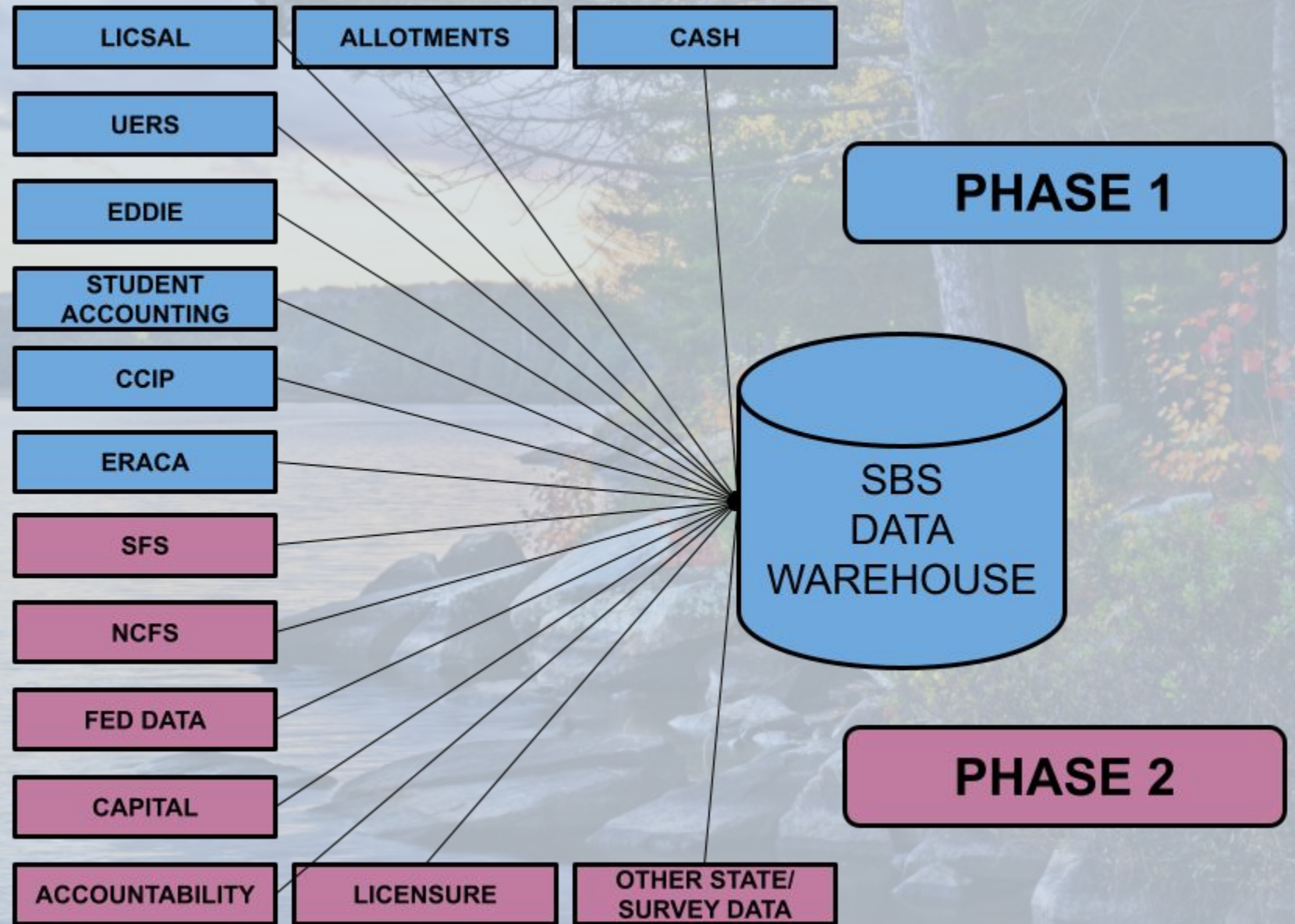
- Replace MSA – Greenscreen System
- Replace Mainframe Cash Process for getting PSUs their cash from appropriated funds
- Upgrade reports and analytics to take advantage of modern technology
- Enable SBS to meet all reporting, analysis, and transactional responsibilities
- Enable NCDPI to respond dynamically to rapidly changing environments

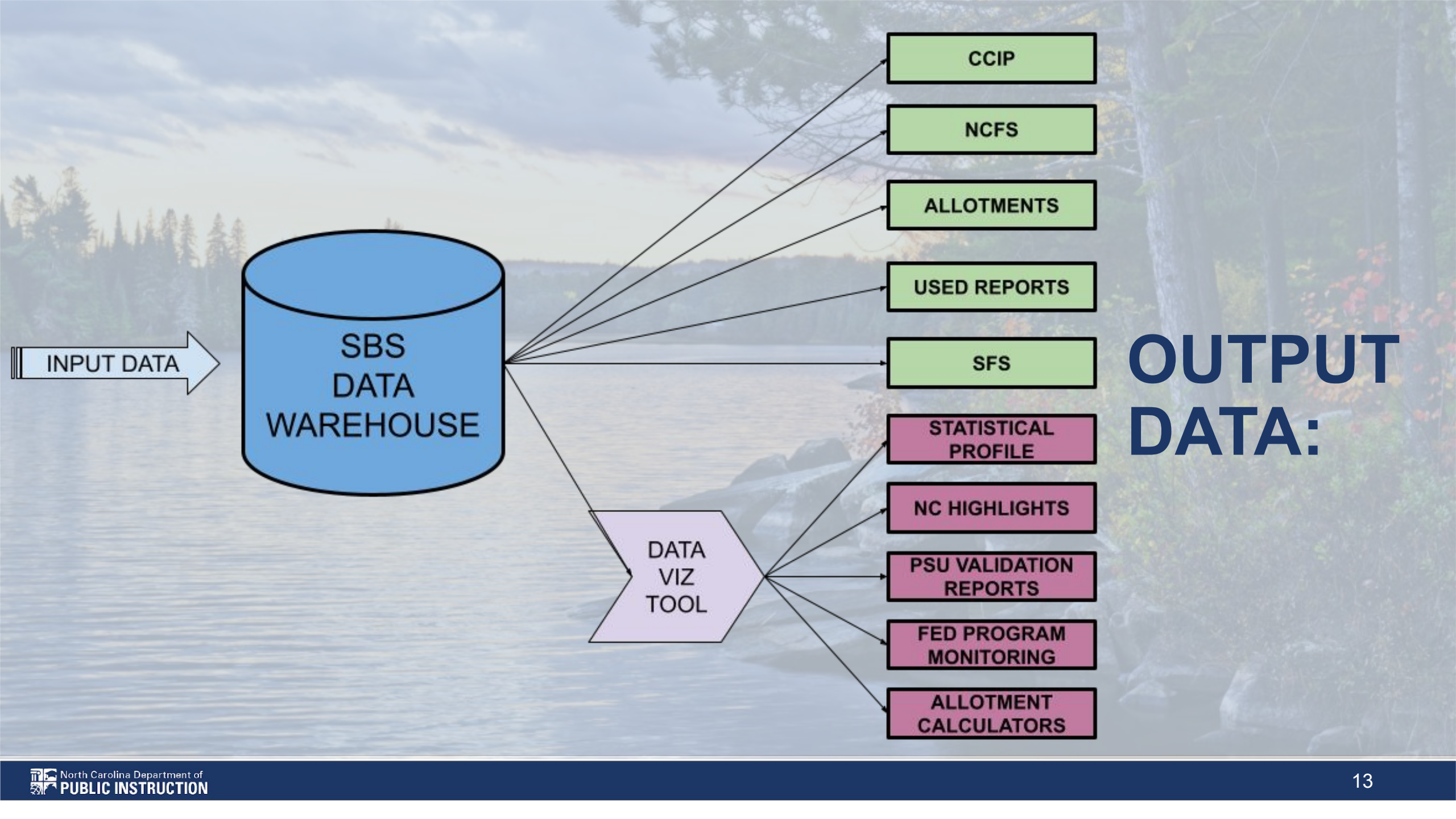


# INPUT DATA: PHASE 1



# INPUT DATA: PHASE 2





# OUTPUT DATA:

# Exploration:

Imagine after you have explained Funding in Arrears to your superintendent/director and/or school/charter board, you are asked to create a report showing the trends of how your Best 1 of 2 ADM numbers have changed over the last 5-7 years and how that compares to the rest of the state and similar districts.

What would it take to collect the necessary data to complete this report?

# Exploration:

1. Best 1 of 2 ADM Data:

Google – NCDPI Best 1 of 2 – Usually the first result



# Issues with current process

- 7 files
- Charters, LEAs, Regional, and Labs in different tabs
- Inconsistent Column Headers across different years
- Inconsistent Names
- 351 different PSUs creating a similar report

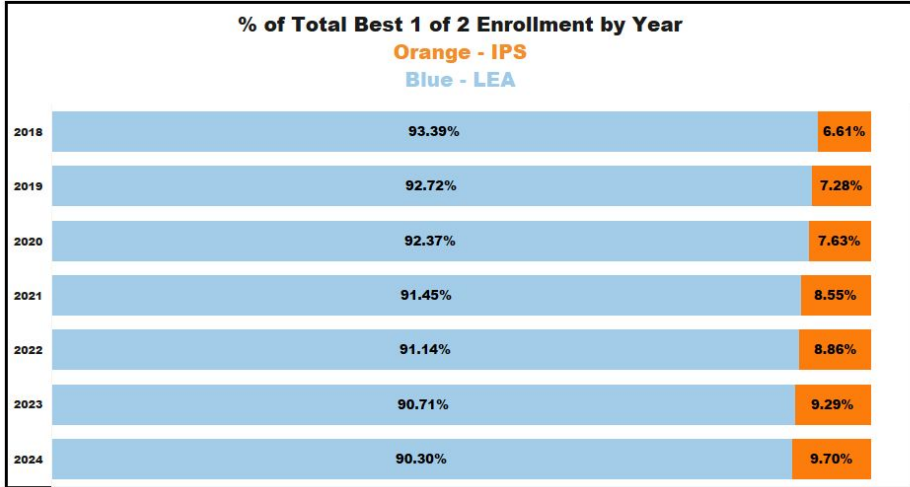
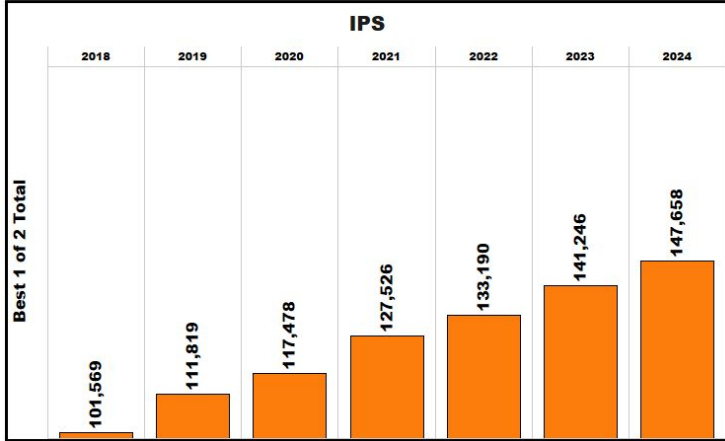
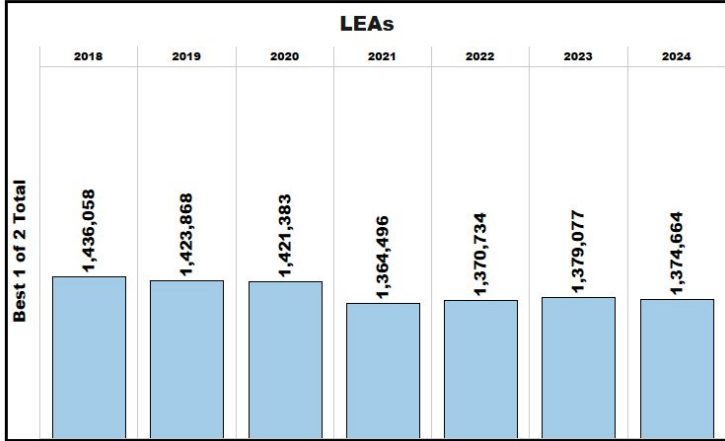


# Issues with current process

- 7 files
- Charters, LEAs, Regional, and Labs in different tabs
- Inconsistent Column Headers across different years
- Inconsistent Names
- 351 different PSUs creating a similar report



Trends in Independent Public Schools compared to Traditional Local Education Agencies  
2018-2024



Select 2 Years To Compare for the two graphs below  
Multiple values

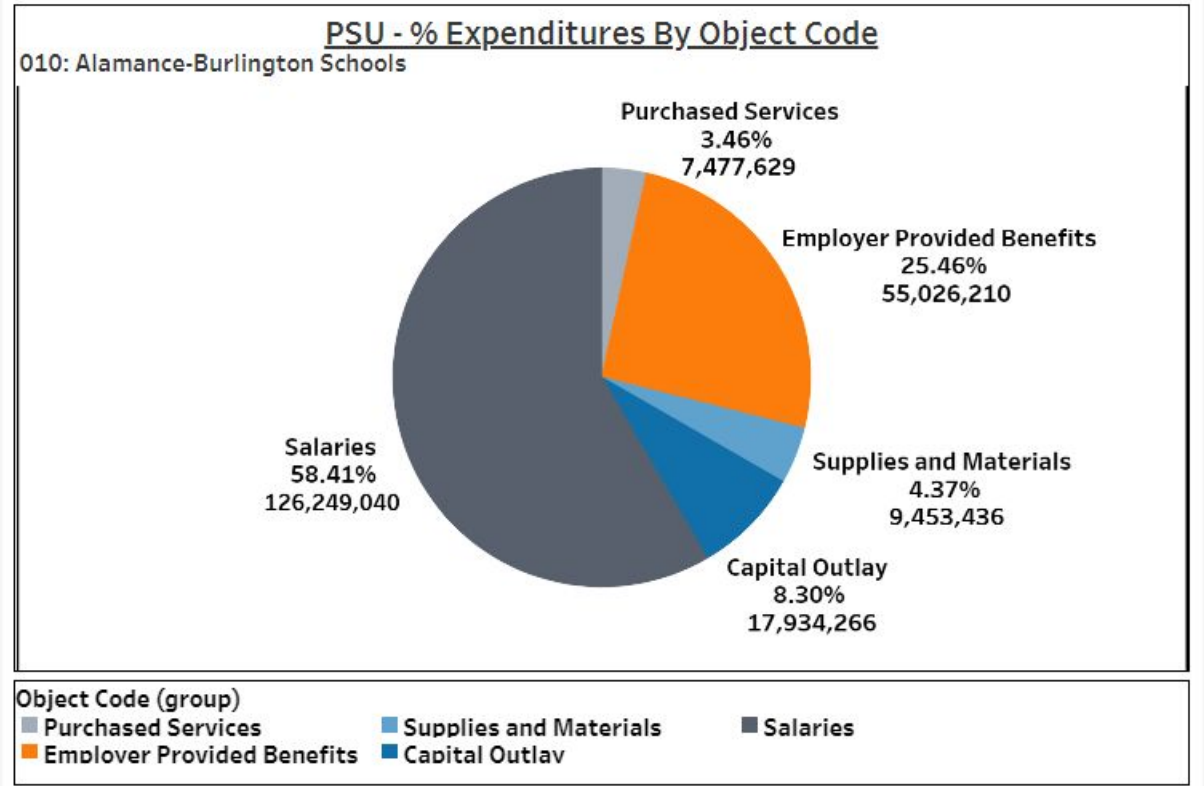
	Best 1 of 2		% Difference	
	2018	2024	2018	2024
IPS	101,569	147,658		45.38%
LEA	1,436,058	1,374,664		-4.28%

# Modernization

- Best 1 of 2:  
<https://shorturl.at/gSm3h>

# Other Views

<https://bi.nc.gov/t/DPI-FinancialBusinessServices/views/CONFERENCEEXAMPLE/REMAININGBALANCE-ONEPRCONEPSU>



### PSU - OBJECT CODE GROUPS by PRC

010: Alamance-Burlington Schools

Prc Code	Prc Description		Object Code (group)					Grand Total
			Salaries	Employer Provided Benefits	Purchased Services	Supplies and Materials	Capital Outlay	
<b>Grand Total</b>	% of Total Ytd Balance		100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
	Ytd Balance		126,249,040	55,026,210	7,477,629	9,453,436	17,934,266	216,140,581
001	Classroom Teachers	% of Total Ytd Balance	31.64%	33.92%				27.11%
		Ytd Balance						

# Data Privacy

<b>PUBLIC –</b> <ul style="list-style-type: none"><li>• No Login</li><li>• Anyone can see</li><li>• No PII</li></ul>	<b>LOGIN -</b>  <b>Just Your PSU</b>	<b>DPI ONLY –</b>  <b>Internal Reporting Only</b>
<b>Every PSU</b>		

# Google Form for Feedback:

# Questions?



North Carolina Department of  
**PUBLIC INSTRUCTION**