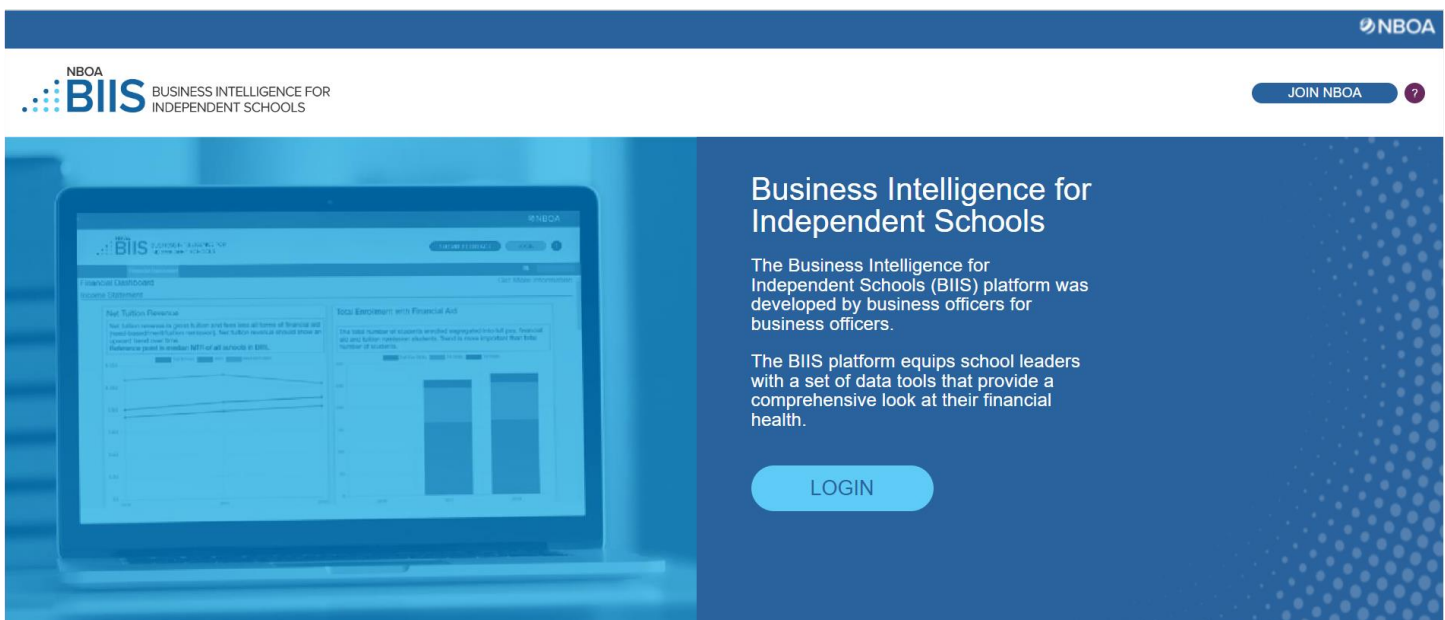


## Reporting Tool Guide

### Entering the Site

The BIIS platform uses single sign-on technology, so once you are logged into the NBOA website (<https://www.nboa.org/home>), you will be able to enter BIIS without additional credentials (click on "BIIS" at the top of the NBOA website, then click "Login" in the middle of the BIIS landing page). You can also enter BIIS directly at <https://biis.nboa.org/> and use your NBOA website credentials. When you arrive at the BIIS platform, you will see the member landing page (see Figure 1). To logout, click on the image of the person in the upper right-hand corner and then on "Logout."

Figure 1. BIIS Landing Page



## Access for School Employees

The Primary Contact for BIIS is the person to whom the NBOA dues invoice is sent, usually the chief business officer at the school. The Primary Contact can give permission to see ("read") data to colleagues via the School Admin page. To access that page, the Primary Contact will click on the image of the person in the upper right-hand corner and then on the words "School Admin."

The Primary Contact will see a list of the individuals at your school. Click on the Edit Permissions button and then check boxes will appear for each of the individuals listed. The Primary Contact has permission to read all data and may edit other school personnel's ability to read data. The initial setting is that everyone listed on the school's roster has the ability to read the standard (or financial) data. *The Confidential Data is the compensation related data.* The ability to read confidential data is initially only available to the Primary Contact at the school. The Primary Contact may grant access to others at the school to read confidential data, and this access *should be limited* to the Primary Contact, the Head of School, the Human Resources Director and/or the Payroll/Benefits Coordinator.

The Primary Contact can edit permissions in BIIS anytime. If the list of school colleagues in BIIS is not correct, the Primary Contact will need to update the school's roster (through NBOA's website).

Follow these instructions to update your school's roster:

1. Click [here](#) to access your account.
2. Scroll down to the "Organizations You Manage" section and click the "Edit" button to the right of your organization's name. \*Please note: This section will only be visible to the Primary Contact at your organization.
3. Scroll down to the "Organization Roster" section.
  - To add a staff member, click the "Add" link on the right side. Enter the person's contact information and click "Save" when you're done. Once the staff member has been added to the organization roster, they can access their account by clicking "Login" on NBOA.org and then "Forgot my Password."
  - To edit an existing staff member on your roster, click "Edit Info" next to their name.
  - If someone on your roster has left your school, click the "End Relation" link next to their name.

## Reporting Tools

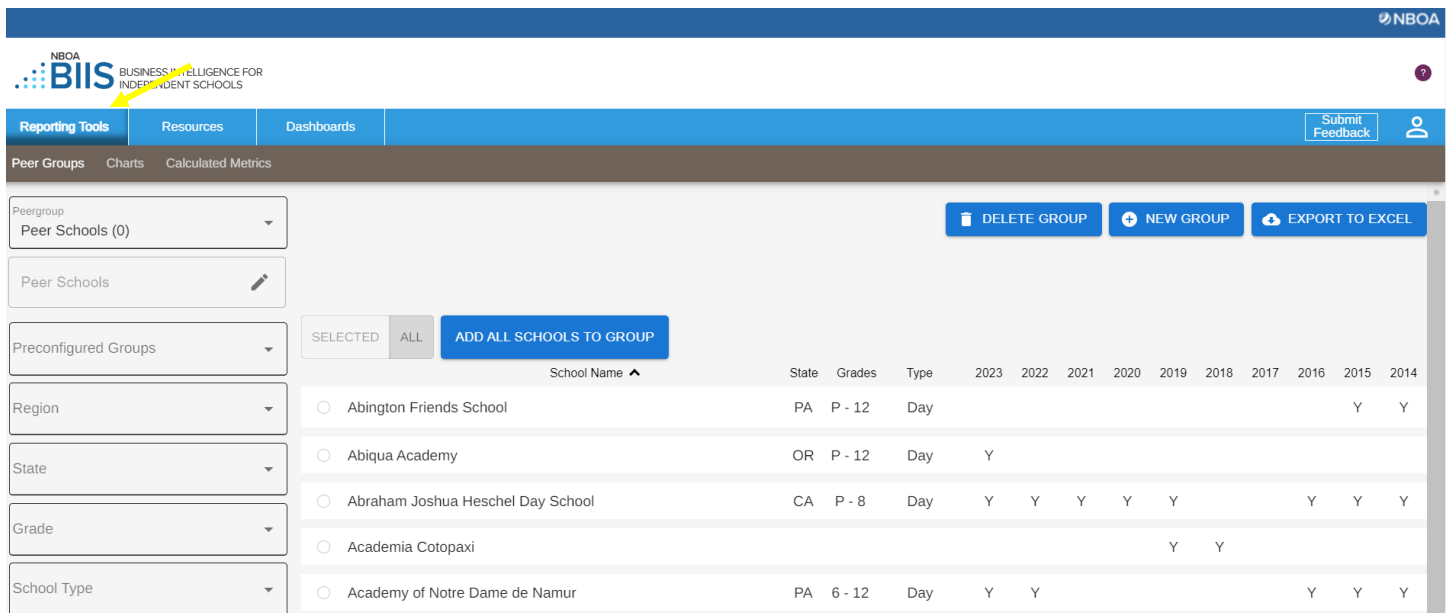
The data available in the reporting tools is available to the extent that your school has participated in data collection. For example, if your school did not participate in the most recent year’s data collection, then you will not be able to access the information from the current year, even if your school has participated in prior years’ data collection; you will be able to access information from the prior years you participated.

### Peer Groups

**Overview.** Click on the Reporting Tools tab (see Figure 2) and you will come to the Peer Groups page. This is where you can create peer groups/cohorts of schools to use with the Charts tool and the Financial Dashboard. These peer groups are linked to the individual member and cannot be shared within the school.

The letter “Y” under a year indicates the school participated in data collection for that year. For years 2016 and prior, a Y indicates the school participated in at least one of the NBOA surveys in that year, so there is some data, but not necessarily all the data. Compensation data must have a minimum of ten (10) schools within the selected cohort reporting a data point for the year for the information to be displayed.

Figure 2. Reporting Tools Tab



School Name	State	Grades	Type	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014
<input type="radio"/> Abington Friends School	PA	P - 12	Day									Y	Y
<input type="radio"/> Abiqua Academy	OR	P - 12	Day	Y									
<input type="radio"/> Abraham Joshua Heschel Day School	CA	P - 8	Day	Y	Y	Y	Y	Y			Y	Y	Y
<input type="radio"/> Academia Cotopaxi								Y	Y				
<input type="radio"/> Academy of Notre Dame de Namur	PA	6 - 12	Day	Y	Y						Y	Y	Y

**Filters.** Use the filters on the left side of the page to help you narrow down the list of schools to select from. The filters are multi-select, meaning that you can select more than one option for each filter. For example, to find schools in New York, New Jersey or

Connecticut with a boarding component and fewer than 500 students, select NY, NJ and CT from the State filter; Day/Boarding, Boarding/Day and Boarding from the School Type filter; and <300 and 300-499 from the Enrollment filter. Breadcrumbs below the peer group name will help you keep track of the filters you have set. Click the X next to an option to unselect that option. You can also unselect options by clicking on them again in the filter.

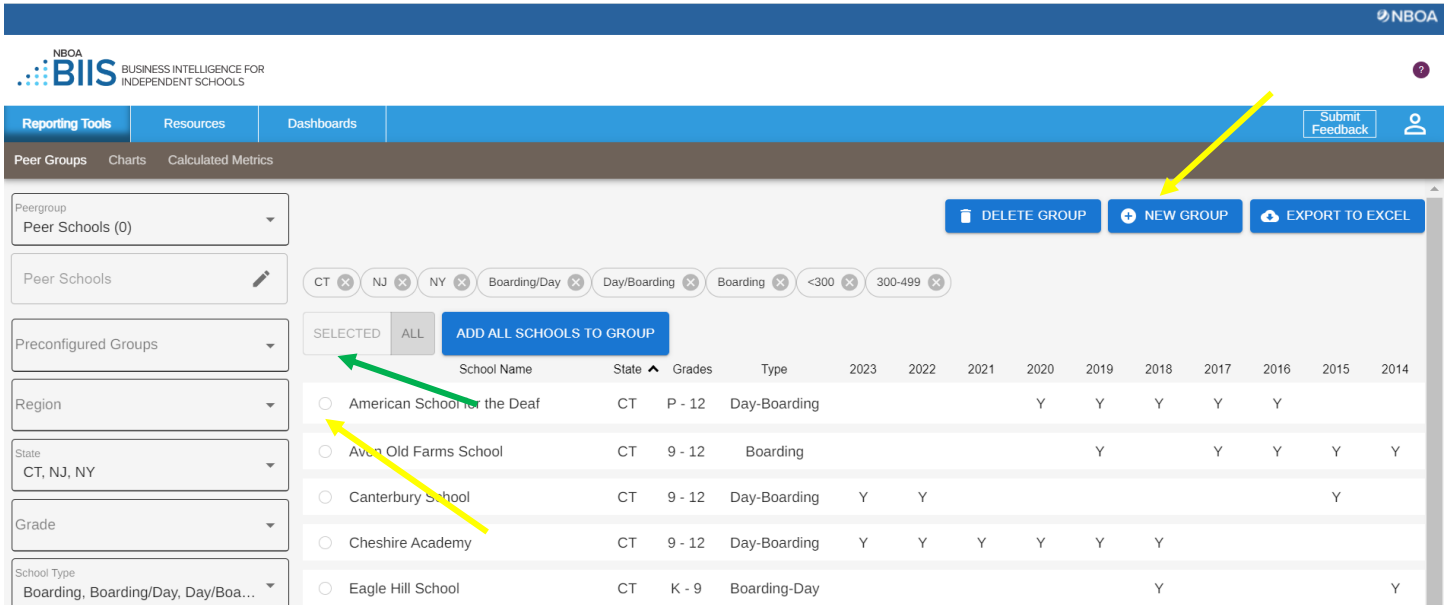
**Headings.** The default organization of the Peer Groups page is school name in alphabetical order. To reorganize the list, click on the headings, such as State, Grades, Type and Year. For example, click on State to organize the list alphabetically by state/province abbreviation (e.g., AL, AR, AZ). Clicking on a Year (e.g., 2020) will organize the list by participation in data collection in that year.

### ***Creating Peer Groups***

To create a peer group (see Figure 3):

- Click on the blue box at the top of the page to create a new peer group ("New Group").
- Type the name of the group into the box and select "Create."
- Select the peer group name from the dropdown menu.
- You may narrow your possible school selections by using the filters on the left side of the page (e.g., region, state).
- Once you have the list of schools down to something reasonable for you to work with, select the schools you wish to have in the group by clicking in the circle to the left of the school's name. Selecting a school places the school on the Selected list (see green arrow in Figure 3 on the next page). Clicking on the circle again will remove the school from the group, taking the school off the Selected list. To add all schools in your filtered list to the group, click the "Add All Schools to Group" button.
- As you select and deselect schools, the number (in parentheses) next to the peer group name will increase or decrease.
- You may edit the peer group name using the pencil icon next to the peer group name once you have selected it from the dropdown menu.
- To delete a peer group, click the "Delete Group" button once you have selected the group from the dropdown menu.
- To remove all the schools from the group, click the "Remove All Schools From Group" button once you have selected the group from the dropdown menu.
- To see just the schools that are in a previously created peer group, click on "Selected" just above the list of schools (green arrow).
- You can download the list of schools in the peer group by clicking on the "Export to Excel" button.
- To see all schools, click on "All" just above the list of schools. Be sure to remove any filters to view the full list of schools.

Figure 3. Creating a Peer Group



Peer Group: Peer Schools (0)

Peer Schools: CT, NJ, NY, Boarding/Day, Day/Boarding, Boarding, <300, 300-499

Preconfigured Groups: SELECTED, ALL, ADD ALL SCHOOLS TO GROUP

School Name	State	Grades	Type	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014
<input type="radio"/> American School for the Deaf	CT	P - 12	Day-Boarding				Y	Y	Y	Y	Y		
<input type="radio"/> Aven Old Farms School	CT	9 - 12	Boarding					Y		Y	Y	Y	Y
<input type="radio"/> Canterbury School	CT	9 - 12	Day-Boarding	Y	Y							Y	
<input type="radio"/> Cheshire Academy	CT	9 - 12	Day-Boarding	Y	Y	Y	Y	Y	Y				
<input type="radio"/> Eagle Hill School	CT	K - 9	Boarding-Day						Y				Y

**TIPS**

- ✓ The Preconfigured Groups include schools for students with learning differences and schools with a religious affiliation. You can use these preconfigured groups as a starting point if you are looking to create a list of peer schools with either of these designations. Schools' inclusion in either of these groups is based on the school characteristics selected by the school in NAIS' [DASL](#).
- ✓ Use the Participating Years filter to help you select schools that have more recent data.

## Benchmarking Reports

To see the tables and graphs, click on the Charts tab (see Figure 4a).

To initially select data to view, select the area of interest from the menu on the left, then select a data point from the list. Alternatively, you can type a topic, such as tuition remission, in the "Search by Topic" box and select a data point from the list. Any data point name containing the words you searched for will be displayed in the list (see Figure 4b).

Figure 4a. Charts Tab

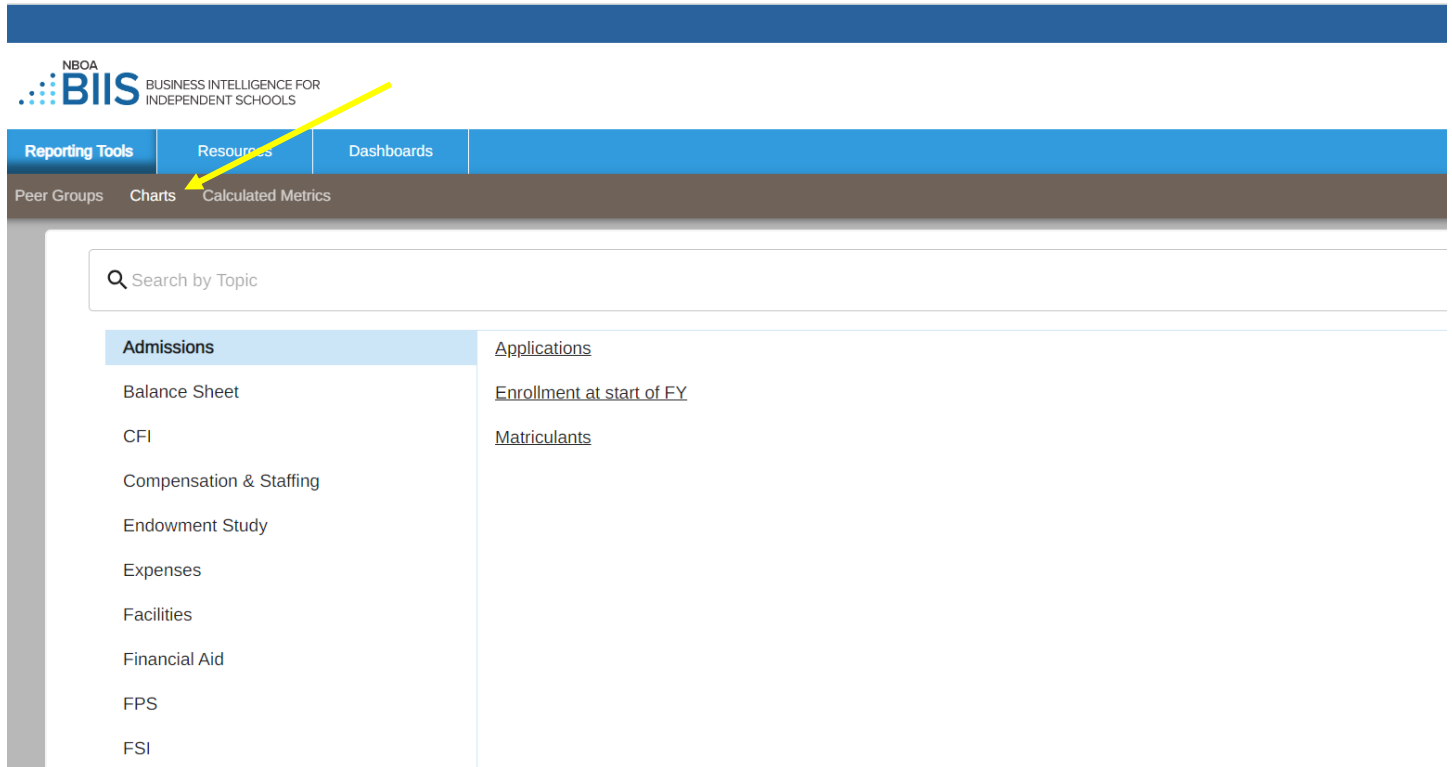
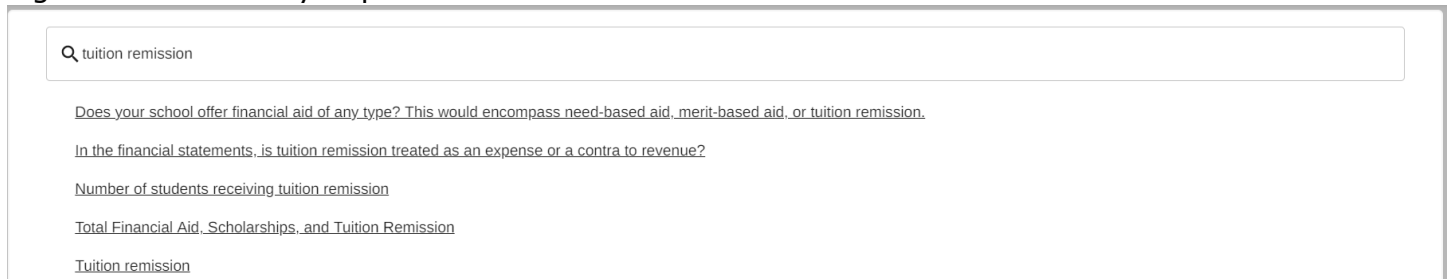
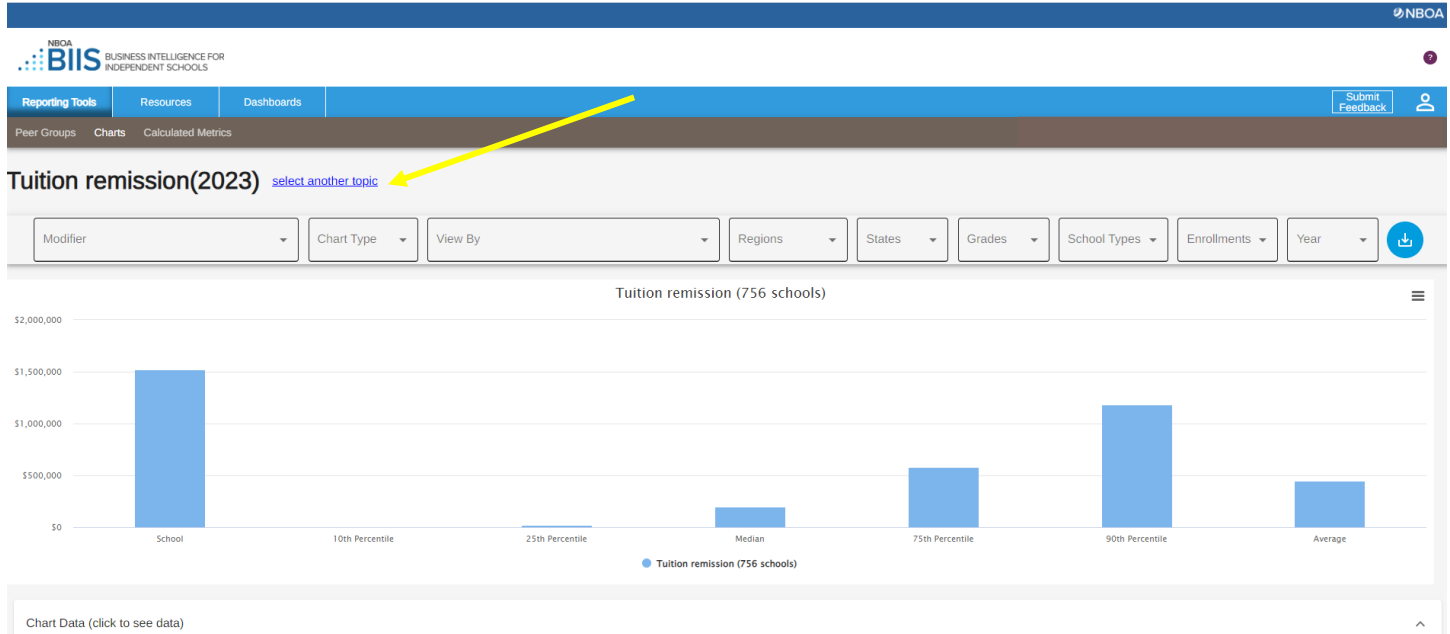


Figure 4b. Search by Topic



To change the data point you are viewing, click “select another topic” next to the data point name (see Figure 5). This will bring you back to the list.

Figure 5. Select Another Topic

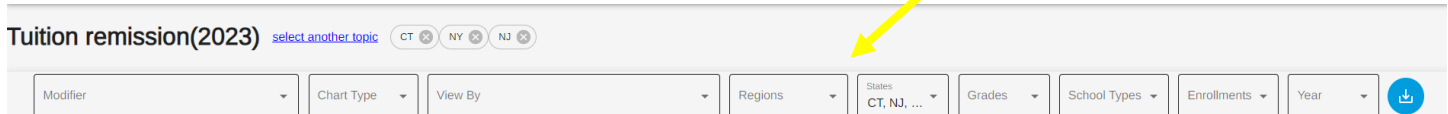


In addition to financial areas such as balance sheet, income and expenses, data points are available for benchmarking in the following areas:

- CFI: The CFI was designed to track a single school’s score over time, not to serve as a benchmark among peer schools. However, you can benchmark the ratios and other data elements that make up the CFI.
- Endowment Study: Key data points from the Commonfund Study of Independent School Endowments are available to schools that participate in both DASL/BIIS financial operations data entry and the Commonfund survey.
- FPS: The financial position survey (FPS) data points and ratios take a comprehensive look at the balance sheet of independent schools.
- FSI: Indicators from NBOA’s Financial State of the Industry report help your school benchmark per-student financial data points. Note that schools need to enter student enrollment data in NAIS’s [DASL](#) for per-student calculations.

Once you have selected a data point, you will be able to use the filters as well as select the chart type using the drop-down boxes near the top of the screen (see Figure 6).

Figure 6. Filters in Charts



- Switch between bar charts and longitudinal trend charts using the “Chart Type” drop down menu. Certain data points will have a pie chart option.
  - In the longitudinal chart type view, you can hide any of the trend lines by clicking on its name (e.g., School, 10<sup>th</sup> Percentile, 25<sup>th</sup> Percentile). Click on the name again to show the trend line.
- Switch between Peer Group and Percentile reporting using the “View By” drop down menu.
- The filters are multi-select, meaning that you can select more than one option for each filter (except for Year; use the longitudinal Chart Type to view multiple years). Breadcrumbs next to the data point name will help you keep track of the filters you have set. Click the X next to an option to unselect that option. You can also unselect options by clicking on them again in the filter or selecting “All” in the filter to clear all the selected options. Note that the number of schools included in the chart will change as you adjust the filters.
- Certain data points will have a modifier option which allows you to create ratios with the data point.
- If not enough schools in the selected filters reported data, you will see a “Not Enough Data” message. Click “Okay” and adjust your filters.

To see the data in table format, scroll to the bottom of the chart and click on “Chart Data.” To download the table on the screen, click on the circle with the arrow pointing down onto the box on the far right. To download the chart graphic, click on the three stacked lines at the top right of the chart and select an option (e.g., PNG image, JPEG image).

#### TIPS

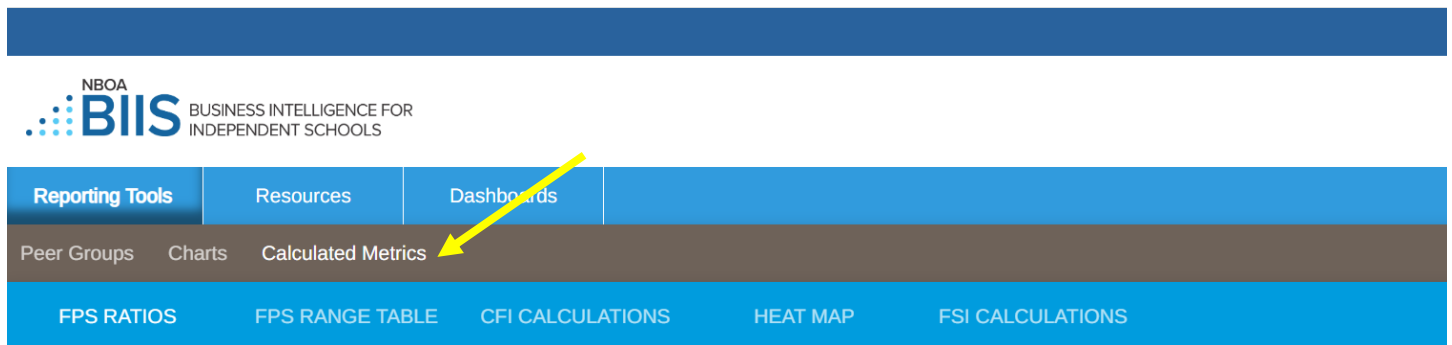
- ✓ Want to download multiple years’ worth of data at once? Change the “Chart Type” filter to longitudinal and download the data from that view.
- ✓ Use the peer groups you created to benchmark your school’s data against similar schools. Use the “View By” filter to select a peer group.



## ***Calculated Metrics***

The Calculated Metrics tab in the Reporting Tools section allows you to see the calculations for the Financial Position Survey (FPS) Ratios, the FPS Range Table, the Composite Financial Index (CFI), the Heat Map and the Financial State of the Industry (FSI) (see Figure 7). Clicking on these tabs will bring up tables that provide the calculations.

Figure 7. Calculated Metrics Tab



The FPS Range Table tool provides a list of ratios calculated in the Financial Position Survey, your school's ratios and how you compare to other schools that have participated in BIIS this year (shown in the "School Count" column on the far right). The values displayed on the screen may be downloaded using the download button on the upper right-hand side of the screen.

The data points included in the FPS Range Table, the CFI Calculations and the FSI Calculations tabs are also included in the Charts tool. To compare your values to other similar schools, find the calculation in the Charts tool and use the filters to narrow the results. If not enough schools in the selected filters reported data, you will see a "Not Enough Data" message. Click "Okay" and adjust your filters. Even more important than comparing your school's values to peer schools is examining your own school's data over time.

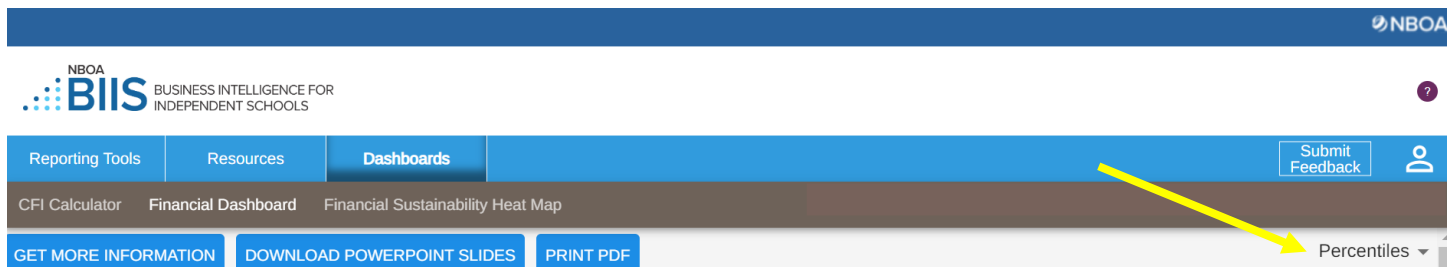
## ***Dashboards***

The Dashboards tab gives you access to the CFI Calculator, the NBOA Financial Dashboard and the NBOA Financial Sustainability Heat Map. These are presentation-ready reports that you may download in PDF format and print. Click on the "Print PDF" button. The CFI Calculator and NBOA Financial Dashboard are also available as PowerPoint slides. Click on the "Download PowerPoint Slides" button.

The CFI Calculator and Financial Dashboard both have links to the NBOA website where you can access more information about the two reports, including video tutorials, which will assist you and your Board in using them. Click on the "Get More Information" button.

The Financial Dashboard report allows you to compare your school’s performance to the median of a peer group you have created (see Figure 8). When you first access the report, on the right-hand side there is a drop-down menu that says Percentiles. Click on the arrow and the list of your peer groups will appear, and you may select the one you want to use. The results will be displayed as the median line in orange.

Figure 8. Selecting Peer Groups for the Financial Dashboard



The NBOA Financial Sustainability Heat Map is a color-coded visualization of your school’s movement toward or away from financial goals. This fully customizable tool allows your school to select indicators, set targets and track progress in areas such as liquidity, financial flexibility and financial stewardship. The heat map provides an at-a-glance understanding of the financial areas where a school is improving and areas that are a challenge. The NBOA Financial Sustainability Heat Map has its own [suite of resources](#) on the NBOA website that includes a user’s guide, articles and a video recording of an introductory webinar. Note that some heat map indicators require four or five years of consecutive data to calculate the ratio.

Reference materials for the NBOA Financial Sustainability Heat Map, NBOA Financial Dashboard and CFI Calculator are also available in BIIS under the Resources tab on the FAQ page.

**TIPS**

- ✓ To optimize your BIIS experience, we highly recommend using Google Chrome as your internet browser.
- ✓ If you can log into BIIS, but can’t see any of the reports, check your security settings. Make sure that your internet browser is set to accept cookies and your security setting allow you to access BIIS reporting tools.
- ✓ To get the most out of your peer group comparisons, check for a “Y” in the most recent year’s column to ensure that the schools in your peer group have provided recent data.
- ✓ Notice an error in your data? Starting with the 2021 data set, make corrections using the Update School Data tool in NAIS’ Data and Analysis for School Leadership ([DASL](#)) system.



## **Have Questions?**

Thank you very much for participating in NBOA's research efforts. Please contact Elizabeth Dabney, [elizabeth.dabney@nboa.org](mailto:elizabeth.dabney@nboa.org), 202-407-7149 if you have questions.