



Persistence Pays Off:

Best Practices for Using the Bloomberg
Professional Service on College Campuses

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Introducing technology into a college or university environment can be a jarring experience for users. Comprehensive training to develop a complete understanding of the technology is necessary and full integration into the culture often takes multiple cycles in the life of the organization (i.e., an academic year). The adoption of the technology by users—in this case faculty and students—is often facilitated by a number of factors, including access to the technology, available support resources and activities that prod users to take advantage of the service. Historically black colleges and universities (HBCUs) that comprise the UNCF (United Negro College Fund) network experienced this phenomenon when “Bloomberg terminals” were introduced to their campuses. This white paper documents the experiences of those institutions and lessons learned in integrating the Bloomberg Professional Service, commonly referred to as “Bloomberg terminals,” into their campuses and curriculum and identifies best practices in promoting greater usage.

Background

In 1994, Bloomberg Financial Markets donated 83 terminals to the 41 (at that time) UNCF-Member institutions. The market value of the donation was \$2.6 million. The purpose for this extremely generous gift was to give UNCF students hands-on experience with state-of-the-art technology. The terminals have allowed UNCF institutions to create an interactive, multimedia network that allows them to share library, faculty and student databases. Faculty and staff have also been able to monitor their institution’s investment portfolio. In addition, students have been able to use the computer system to analyze securities, research companies and monitor Bloomberg’s news wire for their business and journalism classes. The terminals allow them to have access to job listings in the finance field and put their own resumes into a national job database. William H. Gray, III, former UNCF president, said it best, “This unique gift from Bloomberg will give our students valuable access to the information superhighway and to the world of business and finance.” In addition to the two terminals installed at each UNCF-member institution, one terminal was placed at UNCF headquarters.

After several years of use, Bloomberg advised UNCF terminal use at UNCF-Member institutions was not reaching expected and acceptable levels. With the ability to track usage remotely, Bloomberg informed UNCF the frequency and scope of terminal usage. UNCF and Bloomberg reached out repeatedly to institutions to promote terminal use, often to no avail. As a result, Bloomberg notified UNCF that terminals with little to no activity would be removed from those campuses. This led to terminals being removed from several institutions, leaving single terminals on 18 campuses. In April 2011, Bloomberg requested that UNCF conduct assessments to determine the terminal program’s “value-add” for the organization and to provide recommendations based on the findings. Both parties also determined that UNCF needed an individual to manage the program and respond to member institution needs in order to maximize terminal placement and use.

UNCF conducted two assessments to collect more data about how the terminals were being used, the results of which were summarized in two reports. *The Usage of Bloomberg Terminals at UNCF Member Institutions* (2011) and the *UNCF/Bloomberg Terminal Usage and Training*

Survey (2012) helped UNCF understand the ways in which terminals were being used, their frequency of use and by whom, challenges faced in promoting use and tracking users, and the level of support needed to increase terminal usage. Specifically, the reports came to the following conclusions:

- *Campuses had inefficient or non-existent usage tracking systems for the Bloomberg Terminals.* Most of the campuses where respondents said they tracked student usage reported conflicting numbers and 88 percent of respondents expressed an interest in developing or enhancing their tracking system.
- *There was a strong desire for more training to increase terminal proficiency and usage.* Faculty respondents were especially interested in enhancing their proficiency through training.
- *Participants recognized the need to educate and train those who use the terminals on its full range of capabilities.* While most respondents were aware of the terminals on their campus, a third of users were not fully aware of the possibilities offered by them, such as the Bloomberg Certification.
- *There was a lack of common knowledge about terminals (location, capabilities, tracking, etc.), often resulting in somewhat conflicting responses about them.* A wide range of responses by multiple users on each campus indicated an inability to maximize terminal use when faculty often were not fully aware of their location, who used them or how often they were used.
- *Recommended strategies to increase terminal usage included requiring faculty who use them in courses to earn the Bloomberg Certification, providing training opportunities and resources (face-to-face, online and print) across campus, and infusing more terminal usage in the core business curriculum.*
- *Respondents were overwhelmingly interested (88 percent) in using the terminals more frequently in their division/department.*

The assessments, particularly the second one, were very useful in determining which campuses were getting the most out of their terminal usage. In fact, the data collected through that survey allowed UNCF to place institutions into three categories—high, moderate and low—on faculty and student use of the terminals. This analysis provided led to the decision to redeploy the Bloomberg terminals from 18 UNCF-Member institutions to the nine listed below:

- Atlanta University (AU) Center Library – Atlanta, GA
- Fisk University – Nashville, TN
- Florida Memorial University – Miami, FL
- Lane College – Jackson, TN
- LeMoyne-Owen College - Memphis, TN
- Morehouse College - Atlanta, GA

- Rust College - Holly Springs, MS
- Stillman College - Tuscaloosa, AL
- Tuskegee University – Tuskegee, AL

During the course of working with campuses on terminal implementation and use, assessment and redeployment, UNCF identified several lessons learned that led to positive outcomes. What were the positive outcomes of increased terminal use? They include:

- Improved faculty satisfaction;
- Greater curricular integration of terminals;
- Exposing more students to technical aspects of financial sectors through the terminals;
- Facilitating students' Bloomberg certification.

These outcomes should lead to a more robust and engaging classroom experience that will produce more marketable graduates. Next, we summarize the best practices for increasing terminal use that can serve as a model for other institutions attempting to realize similar outcomes.

What did we learn about increasing terminal use?

Through the assessments and reallocations, several nuggets of wisdom emerged about how to increase terminal use by HBCU students and faculty. These learnings ranged from implementing training programs to more effectively tracking terminal use on a regular basis. To supplement this information, we also provide a snapshot of each participating institution's use of these best practices.

After deciding to redeploy the terminals to a smaller number of institutions, UNCF and Bloomberg collaborated on how to approach differently the marketing, physical placement, tracking and training with the primary goal of optimizing terminal use. During the brainstorming process we asked what policies and practices could help advance this initiative and add value for member institutions. From the aforementioned surveys and discussions with member institution representatives, we collaboratively identified the following areas in which UNCF-Member institutions could take efforts to increase Bloomberg terminal usage:

- Implementing training programs
- Providing access to the Bloomberg Help Desk Application
- Creating monthly tracking logs
- Implementing a "train the trainer" initiative
- Incorporating Bloomberg terminals into the curriculum

Training Programs

The two assessments clearly demonstrated that member institution representatives needed to be trained more effectively on the fundamentals of terminal use. Specifically, faculty who

planned to use the terminals in their coursework needed to be trained on the totality of possibilities available through the terminals and students who were assigned to use the terminals needed deeper training. Member colleges and universities had access to limited training opportunities, but the underutilization of the terminals led us to believe that faculty and other institutional representatives would benefit from an exclusive training with selected Bloomberg LP staff. Through a generous donation from Bloomberg, a representative from each participating member institution flew to Bloomberg's headquarters in New York City and received an exclusive one-day training.

The training covered a variety of Bloomberg Fundamentals including: Basic Navigations; Equity; Fixed Income; and Launchpad. Attendees were instructed in advance to bring questions and challenges for the trainers, and several reported on the positive benefits the training helped them to achieve.

Help Desk Application

The ability to access troubleshooting support and assistance is critically important when learning a new program, or just simply to validate the work being done. Participating member institutions did not have access to the Bloomberg help desk application. As a result, UNCF and Bloomberg realized the necessity of opening that channel for representatives to easily access help-desk support.

The help desk is staffed by dedicated Bloomberg terminal experts who can assist UNCF-Member institution faculty, staff and students with their terminal-related questions and to work through any challenges that arise, from finding the correct function code to printing resource guides. Accessing help-desk support is as easy as pressing the "help" button on the Bloomberg keyboard, a function participating institutions now have access to.

Tracking Logs

One of the most glaring issues that emerged from the UNCF assessments was the need for a more consistent, valid, reliable tracking mechanism. Participating institutions maintained their own count of faculty and student use but Bloomberg also maintained the ability to track terminal usage remotely from their New York City headquarters. Unfortunately, the two numbers never aligned. Institutional tracking logs were often no more than a sign-in sheet which relied on students to self-report their usage. Some campuses tracked use by an Excel spreadsheet, but three-quarters of institutions had no tracking system at all. UNCF developed a tracking log for each Institution and required that it be completed and submitted to the program manager at the end of each month. The tracking log captures the following data:

- Date of use;
- Terminal number;
- Whether it was a student or faculty member;
- The associated course title;
- Length of time on the terminal.

Training the Trainers

Bloomberg and UNCF decided that once each member institution representative had been trained, that individual would return to their institution and train other faculty and staff members. To prepare institutional representatives for this responsibility, the corporate office trainers created Bloomberg Resource Guides. These resource guides can inform student homework assignments and exams. Coupled with the full-day onsite training provided by Bloomberg staff, institutional representatives were confident in their ability to impart their new-found knowledge on colleagues and students. Not only did Bloomberg provide pre-printed resource guides to participating UNCF-Member institutions, they also trained representatives to print resource guides directly from the terminals.

Curriculum Infusion

One of the original goals of the Bloomberg terminal program at UNCF-Member institutions was to have faculty incorporate terminal use in business school curriculum. This would lead to students becoming skilled in terminal use, which could make them more attractive job candidates. When UNCF examined how many faculty used the terminals in the curriculum and how often, there was no clear relationship between the two. The variation in the data suggested the need to have institutional representatives strongly encourage faculty to incorporate terminal use into their course curricula and assignments. This message was driven home during subsequent training opportunities with institutional representatives. As a result, the frequency with which the terminals appeared on course syllabi as a requirement increased substantially and now each participating campus reports higher numbers of faculty engaging in this practice. In fact, this practice has become the most widespread amongst participating institutions.

With these specific tools in hand, participating institutions witnessed a significant increase in Bloomberg terminal use. What follows are UNCF-Member institution success stories in using Bloomberg terminals

Success Stories and Best Practices

Several success stories emerged after reducing the number of institutions housing terminals to nine and data was collected to inform next steps. While the prevailing success was increasing terminal use, the overarching question was how did institutions achieve this? What follows in this section is a brief example of what increased terminal use looks like followed by examples of what participating institution representatives describe as best practices in achieving this goal.

Increase in Terminal Usage - Based upon the terminal usage data in table 1, a significant increase in the usage of the Bloomberg terminals was evident during the period in question. The percentage increase at Morehouse (7400%), the AU Center (2242%) and Stillman (117%) are remarkable. Other institutions, such as Lane and Tuskegee, saw their terminal use more than double at some point during the cycle measured before tapering off, which could be explained by the ebb and flow of the academic year. While all institutions did not experience a

continuous upward increase in terminal use, every institution experienced some level of increase during the data collection period.

This data also reveal trends about when students use the terminals during the academic year with the lowest terminal usage tending to occur during the months of spring break (March – April) and the holiday seasons (November – December). Further research is necessary to learn more about activities and initiatives at institutions with substantial increases in terminal use.

Table 1. Terminal Use by Institution, September 2013 – April 2014

Institution	Sept 2013	Oct 2013	Nov 2013	Dec 2013	Jan 2013	Feb 2013	Mar 2013	Apr 2013
AU Center	7	7	12	5	12	22	23	164
Fisk University	39	35	6	0	14	15	16	5
Florida Memorial University	174	186	126	5	2	87	111	99
Lane College	40	9	68	9	5	90	20	24
LeMoyné-Owen College	53	57	33	6	66	54	39	60
Morehouse College	0	4	26	4	16	34	46	74
Rust College	194	57	78	69	74	80	106	56
Stillman College	226	289	176	67	131	490	343	395
Tuskegee University	13	16	7	8	9	33	5	4
Total	746	660	532	173	329	905	709	881

Bloomberg Aptitude Test (BAT) Certification – Each participating institution, including the AU Center, has implemented the Bloomberg Aptitude Test Certification program. Between January 2014 and present, over 70 students completed and received a BAT certificate. This number has steadily grown since 2012 as faculty more consistently encourage students to pursue this goal. Some institutions are requiring their business majors to have this certification. Having taken the BAT certification program makes graduates of UNCF-Member institutions more competitive in the job market as they pursue various financial industry careers.

BAT Session – The AU Center Robert W. Woodruff Library hosted the Bloomberg Aptitude Test session in Spring and Fall 2014 with 16 students in attendance across both sessions. Institution representatives worked closely with Bloomberg Institute representatives, to ensure that BAT sessions were a success. Faculty volunteered to assist with recruiting students to take the BAT. Test takers received feedback at the end of the sessions. Aggregate feedback results show that the majority of test takers were informed about the BAT sessions by their professors.

AU Center representatives continue to work closely with Bloomberg Institute representatives to host additional sessions. The AU Center representative continues to collaborate with faculty on Bloomberg-related assignments and offers regular Bloomberg Terminal Walk-In sessions during the library's final exam/extended hours period. These efforts have led to a substantial increase in Bloomberg Terminal use at the AU Center.

Curriculum Infusion – Six professors at the AU Center are incorporating Bloomberg terminals in their course assignments. Each professor teaches two courses with a class project using Bloomberg terminals. There are 45 to 60 students enrolled in each class and terminal use has been incorporated into the following assignments: Business Finance Project, Weighted Average Cost of Capital, Portfolio Management, Portfolio Construction, Asset Allocation Project, and Annual Course term paper.

Institutional Efforts

Each participating institution implemented the previously discussed best practices differently, but the community of campuses learned from each other. The following examples identify which initiatives each campus implemented.

Atlanta University Center (AUC)

Training

- The Business Reference Librarian attended the one-day training sessions at Bloomberg HQ in July 2013 and May 2014.
- The Business Reference Librarian offers specialty sessions to AUC students and faculty members from Spelman College, Clark Atlanta University, Morehouse College and the Interdenominational Theological Center.
- The Business Reference Librarian will expand the University Librarian's familiarity with Bloomberg.
- Training sessions for all AUC Woodruff librarians is scheduled to ensure that faculty and students can work with any librarian on Bloomberg related questions.

Curriculum Incorporation

- The Business Reference Librarian works with faculty to develop specialty sessions and assignments using the Bloomberg Terminal for analyzing stock market trends and international financial news in Writing and Reporting.
- The Business Reference Librarian offers walk-in sessions throughout the week.
- Bloomberg terminal refresher classes are offered during final exams for students having difficulty with class assignments and/or who require general assistance with using the Bloomberg terminals.
- Business Reference Librarian developed the Bloomberg LibGuide to strengthen students' independent understanding and incorporation of Bloomberg's terminals into assignments. The LibGuide provides assistance with Company Descriptions, Company Financials/Bloomberg Magazine, Bloomberg Keyboard, Bloomberg Guides, Printing in Bloomberg, Creating a Personal Log-on and Bloomberg Certification.

Future Goals

- Launching a multi-faceted marketing plan to promote terminal use for faculty and students.
- The Business Reference Librarian will partner with Bloomberg and AUC faculty to host the BAT session.

Fisk University

Training

- Institutional representative attended the one-day training sessions at Bloomberg HQ in July 2013 and May 2014.
- Institutional representative offers training to students and faculty members.
- Institutional representative used resource guides and other Bloomberg materials to train the faculty, who incorporated the information into their curriculum.

Curriculum Incorporation

- Institutional representative is working with faculty to incorporate Bloomberg terminals into assignments.

Future Goals

- Institutional representative will partner with Bloomberg and AUC faculty to host a BAT session.

Florida Memorial University

Training

- Hired and trained six student tutors to assist other students in using the Bloomberg terminals.

Curriculum Incorporation

- By collaborating with faculty, the following courses have incorporated the Bloomberg system into their curricula: Principles of Finance; Investment; Business Statistics; Futures and Options Markets; Corporate Finance; Financial Management; Principles of Microeconomics; Principles of Macroeconomics; Money and Capital Markets; International Business and Senior Project.
- The Business Reference Librarian developed the Bloomberg LibGuide to strengthen students' independent understanding and incorporation of Bloomberg's terminals into assignments. The LibGuide provides assistance with Company Descriptions; Company Financials/Bloomberg Magazine, Bloomberg Keyboard, Bloomberg Guides, Printing in Bloomberg, Create a Personal Log-on and Bloomberg Certification.

Future Goals

- Implement the Investment Simulation Competition – Students start with a virtual cash account using an online investment game. As they compete for the top spot, the setup is engaging and learning is a natural part of the experience. Two students who participated in the games will make a presentation on the University's Performing Arts and Research Day to get more students and faculty members interested in simulation games and Bloomberg.

Lane College

Training

- Engaged Lynne Henning, vice president and Partner with Raymond James, a local investment firm, to talk about ways to foster student interest in financial and investment careers.
- Institutional representative has taken the lead in training other business faculty on the use of Bloomberg terminals.

Curriculum Incorporation

- Students use the Bloomberg terminals for stock research.
- The Marketing faculty is integrating Bloomberg terminals into the classroom by assigning small groups to research a particular company or industry that is aligned with the current discussion topic.
- Accounting students must identify a specific balance sheet and then ascertain the current assets and liabilities, current ratio, quick ratio and working capital.
- Management classes are utilizing Bloomberg in developing business plans, proposals and case research.
- Faculty meetings include conversations across business disciplines – Accounting, Economics, Finance, Marketing and MIS – about how to leverage Bloomberg across the curricula.
- Developed a Bloomberg component in all our core business classes, where applicable. The activities are to be specifically identified in the syllabus and mapped to a specific course outcome by the end of the academic year.
- Students pursue the BAT Certification.

Future Goals

- To integrate the Bloomberg terminals into their business engagement lab which, in conjunction with other technologies, could transform their business program.

Lane College has been particularly adept at leveraging the Bloomberg terminals to build momentum across business disciplines. Lane traditionally viewed Bloomberg as a tool for the finance faculty rather than an important part of a comprehensive plan to energize and engage students into the world of business. Lane has since shifted its paradigm.

Le-Moyne Owen College

Training

- The institutional representative has been working with Bloomberg terminals since 2000, and also attended Bloomberg workshops in Memphis, New York and Atlanta.
- Bloomberg representatives held mini-seminars for the faculty on more than one occasion.

Curriculum Incorporation

- Invited other faculty to incorporate the terminals in Economics, Accounting and Finance courses and also in the Business Capstone courses.

- The Capstone I course requires every student to complete an assignment on the Bloomberg terminals.
- Bloomberg I (BUAD 348) and Bloomberg II (BUAD 448) are required for all Business majors. Every student graduating in 2017 will have completed two courses on the Bloomberg terminals and many will have completed the BAT Certification exam.
- Developed and offer BUAD 348: Bloomberg I, which is entirely taught on Bloomberg Terminals.
- Developed and offer BUAD 448: Bloomberg II, a continuation course in Bloomberg.
- Installed a 55" Mondo Pad in one classroom and a projector in another classroom to teach the Bloomberg course.
- Install one of the terminals in a laptop computer, which the faculty member takes to the classroom to demonstrate the Bloomberg screen on the Mondo pad.
- Students complete the BAT Certification exam.

Future Goals

- The college administration and faculty are committed to increasing terminal use. The awareness of the Bloomberg terminals has also increased among students on campus.

Morehouse College

Training

- At the end of each semester, the Morehouse College Bloomberg representative leads an instructional/informational Bloomberg terminal session.
- Faculty training sessions have been organized to increase Bloomberg usage in the classroom and for research.
- The institutional representative has attended training at Bloomberg HQ and is responsible for training faculty and students that require assistance on the Bloomberg terminals.
- A work-study student has been trained to assist Bloomberg terminal users.

Curriculum Incorporation

- The College is testing a requirement for corporate finance students to use Bloomberg terminals in their courses. Students will use the Bloomberg terminal weekly to:
 - Gather news relevant to course materials;
 - Gather corporate fundamental data and create/analyze financial ratios;
 - Prepare term projects;
- Bloomberg terminals will be used in finance, economics and marketing courses.

Future Goals

- A student committee is preparing a Morehouse specific Bloomberg "how to" handbook.

Rust College

Training

- The institutional representative trained faculty and staff on the Bloomberg Terminals.

Curriculum Incorporation

- Continue to recruit new faculty to use the Bloomberg terminals.

Future Goals

- To encourage and motivate faculty to utilize the Bloomberg services in supporting their curriculum.

Stillman College

Training

- The institutional representative trained faculty and staff on the Bloomberg terminals.

Curriculum Incorporation

- The Business Program revamped its curriculum by including Bloomberg Financial Literacy and Professional Development programs for all students at the college.
- Developed and offered a Financial Literacy course, which was designed to offer basic personal financial savviness ranging from personal budgeting to buying decisions, hence preventing costly financial mistakes.
- Faculty are contributing to the success of the Financial Literacy program by assigning projects where the students would utilize the Bloomberg Financial Information system in and outside class.

Future Goals

- Continue to develop the Financial Literacy Program.

Tuskegee University

Train the Trainer

- The institutional representative conducted an internal training session for faculty.

Curriculum Incorporation

- Students are required to track the S&P 500 and the 10-year Treasury in the Intermediate Finance Course and Investments Course using Bloomberg terminals.
- All students are required to become Bloomberg certified in Equity and Fixed Income.
- The Investments students are required to get certified in Commodities and Currencies using Bloomberg terminals.
- Students in Supply Chain Analysis use the supply chain feature in Bloomberg for a required assignment.
- Students in the Investments course must perform an individual stock analysis project using the Bloomberg terminals.
- Require all business students in the College of Business and Information Science (CBIS) to become Bloomberg certified.

Future Goals

- Work with individual faculty to ascertain how Bloomberg can assist them in the classroom to enhance student learning.

Additional successful strategies employed by Tuskegee include having the Bloomberg terminals in the College of Business and Information Science building, located near faculty. It is located near an advisor to assist other faculty and students in using the terminals. Another successful strategy was to install the Bloomberg terminal on a notebook computer that will be kept by the Dean's office to be signed out by faculty.

The persistence of Bloomberg LP, UNCF and the UNCF-Member institutions to fully implement the use of Bloomberg terminals on a select number of campuses for maximum benefit has paid off. Based on the information documented previously, the UNCF Bloomberg Initiative has been extremely successful. All participating UNCF-Member institutions have worked diligently to ensure that their faculty have been trained and have the resources and tools needed to successfully incorporate the Bloomberg terminals into their curriculum. They have also ensured that their students are not only able to use the Bloomberg terminals but also have successfully completed the BAT certification program. This certification and the ability to become skilled at using the Bloomberg terminals has given students at our member institutions a significant boost in their ability to be competitive in the current job market, which helps to demonstrate the HBCU value proposition, diversify the business and finance workforce and change the lives of these students and their families for the better for generations to come.

Appendix of Curricular Integration of Bloomberg Terminals

Florida Memorial University

1. FIN 301 Principles of Finance

In this class, students learn the basic tools of navigating the Bloomberg Terminals. Students are given simple Bloomberg assignments. These assignments are specifically designed to teach students how to use the Bloomberg terminal. Some examples of assignments: financial ratio calculation, industry analysis, various market indexes and company news. Students learn the basics of Bloomberg with the help of tutors.

Students are also encouraged to take the Bloomberg Certification test. Until now, 46 FMU students have passed all four areas (equity, fixed income, commodity and FX).

2. FIN 333 Investments

In this class, students engage in the stock simulation game in which they apply fundamental and technical analysis of companies. In the process, students use Bloomberg terminals.

3. FIN 495 Futures and Options Markets

In this class, students engage in the stock options simulation game. In the process, students use Bloomberg terminals.

4. BUS 498 Senior Project

In this class, students engage in a comprehensive analysis of companies. In the process, students use Bloomberg terminals.

Morehouse College

Bloomberg Terminal Company Analysis Assignment

What is the future competitive landscape of the company you are analyzing? Utilize Bloomberg's comprehensive analysis tools to develop/gather highly quantitative content that will help you deliver solid conclusions benefiting your analysis and illustrate new opportunities and potential revenue streams that will assist you in determining whether or not your firm will remain competitive. This exercise will benefit your decision-making skills and help to direct your future business strategy.

View global market share data for the leading companies in your company's industry in 2014 to upgrade your knowledge regarding the industry and determine how competitors can exploit key business opportunities.

Your report should provide a detailed analysis of your company, the competitive landscape, and the commercial drivers and restraints allowing them to more effectively compete in the market. In addition to current market shares for the leading companies, your report should contain original critical analysis, including a stock price analysis and reveal insight into commercial developments.

Students should gain a thorough understanding of the competitive landscape by profiling their company and examining their positioning, capabilities, product portfolios, R&D activity, services, focus, strategies, M&A activity, and future outlook.

Your report must contain the following screenshots and requested PDF files related to the financials for your specific company. The written analysis portion of your report must be, at least, 10 pages and double-spaced with 12 inch font.



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