

# **KEY PERFORMANCE DASHBOARD INDICATORS**

**February 2010**

## Key Performance Dashboard Indicators (KPD I)

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The [University] Performance Dashboard Indicators (KPD I) present graphical representations of [University]'s critical success factors. The factors compare [University] with its fifteen "market basket" competitors (listed on the last page) and show current positions and longer term trends. As [University] moves forward with the first implementation stage of its new Strategic Plan, it is important to identify a manageable number of institutional performance indicators, establish measurement goals, and monitor the progress toward the established goals.

The KPD I currently consists of 39 graphs. They are organized into quality indicators and financial indicators. We included data for the past five years, where appropriate. Quality indicators include admission selectivity, yield rates, graduation rates, faculty-student ratio, and demographic data for our faculty, staff, and students. Financial indicators include tuition discount ratio, the financial ratios commonly used by rating agencies, S&P and Moody's financial ratings, voluntary giving and total gift income activities.

Traffic light conventions give a quick appraisal of the longer term "trend" (i.e., how have we performed over time?) and the current status "gap" (i.e., where do we stand compared to the market median?). The next steps are to establish performance targets for the next two years and make systematic improvements toward green dashboard lights.

Dashboard Indicators:	
Green	Satisfactory Performance
Yellow	Improvement Opportunities
Red	Requiring Immediate Attention

These initial readings of the KPD I confirm several positive trends and highlight some areas for improvement for [University]:

#### **Green** Satisfactory Performance

- ◆ Undergraduate admission is becoming increasingly selective: freshmen SAT scores and top high school standing are increasing, and the acceptance rate is decreasing.
- ◆ Faculty resources are improving over time in terms of percentages of full-time faculty and smaller class size.
- ◆ Tuition discount ratio for full-time freshmen is higher than our market basket institutions.
- ◆ Debt service is sufficient without impinging further on financial resources needed to support other functional areas.
- ◆ Expendable net assets are sufficient to cover debt should the institution need to settle its obligations.

#### **Yellow** Improvement Opportunities

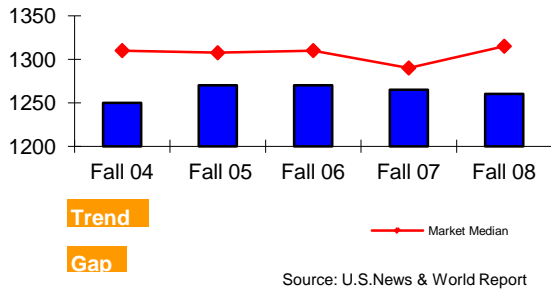
- ◆ Although student/faculty ratio has improved, there is still a gap compared to our competitors.
- ◆ Although our endowment market value has increased, there is still a gap compared to our competitors.

#### **Red** Requiring Immediate Attention

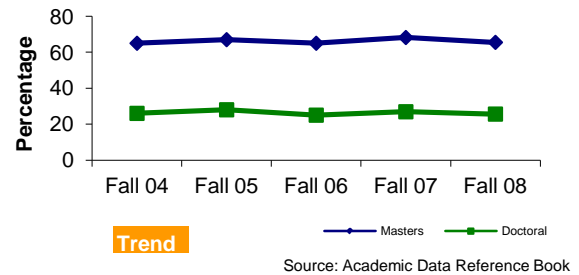
- ◆ Undergraduate admission yield rate shows a growing gap compared to the market basket institutions.
- ◆ Student ethnic diversity has decreased while our market basket schools experienced an increase.
- ◆ International undergraduate enrollment has decreased over the years.
- ◆ Alumni giving rate has decreased over the last few years, falling further from our market basket institutions.
- ◆ Assistant professor salary compensation level is at AAUP level 3.

## QUALITY INDICATORS - ADMISSIONS

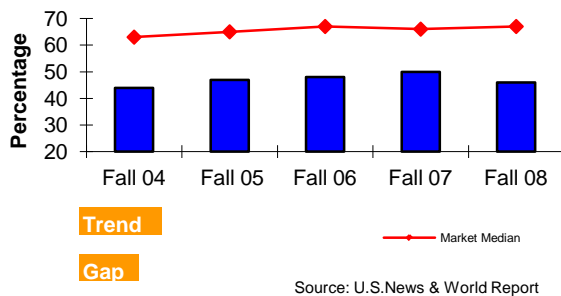
**Freshmen SAT Score 50 Percentile**



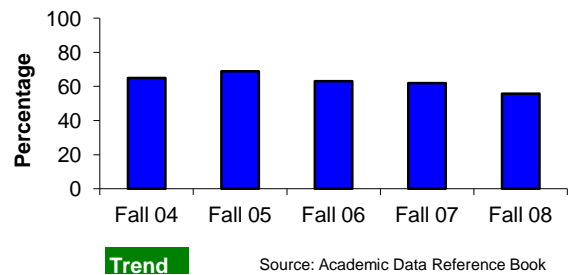
**Graduate Acceptance Rate**



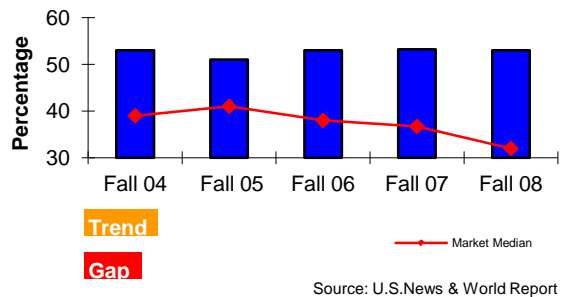
**Freshmen in Top 10% of HS Class**



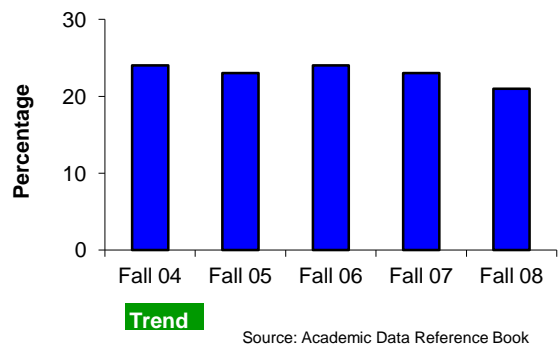
**Undergraduate Transfer Acceptance Rate**



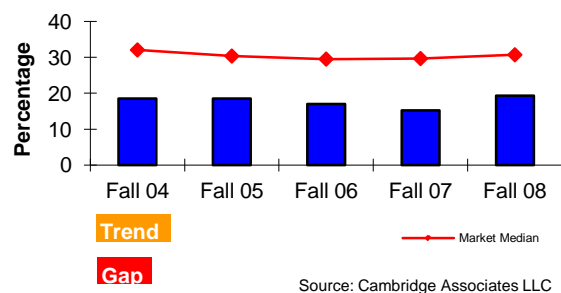
**Undergraduate Acceptance Rate**



**WCL Acceptance Rate (JD only)**

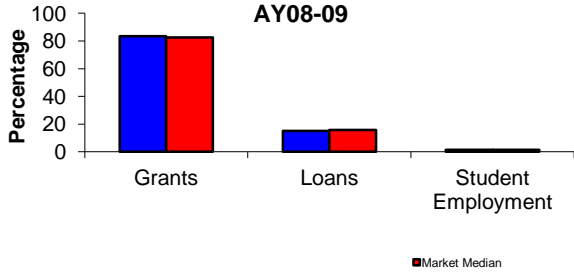


**Undergraduate Admission Yield Rate**

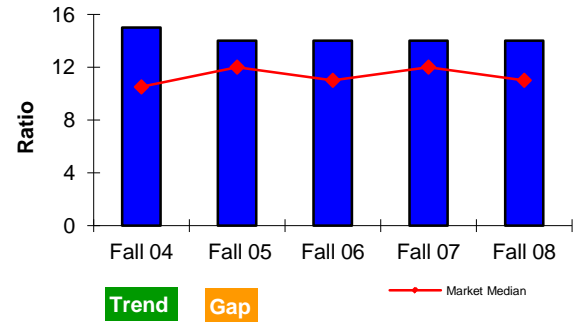


## QUALITY INDICATORS - UNDERGRADUATE

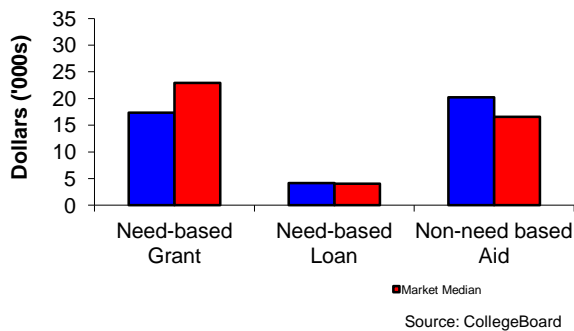
**% of FT Freshmen Receiving Financial Aid AY08-09**



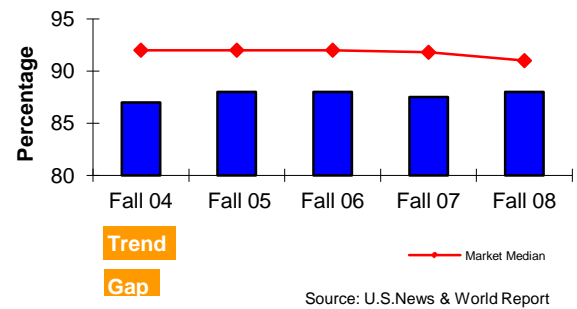
**Student/Faculty Ratio**



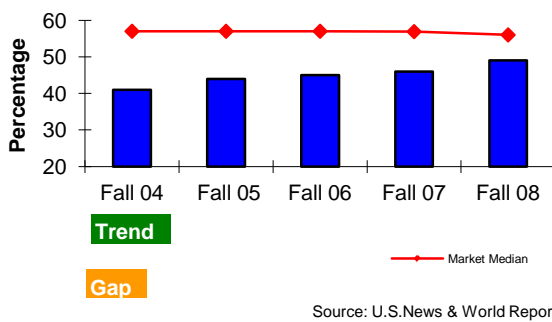
**Average \$ of Undergraduate Financial Aid AY08-09**



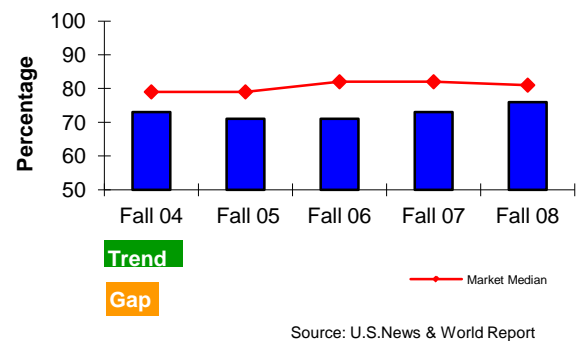
**Average Freshmen Retention Rate**



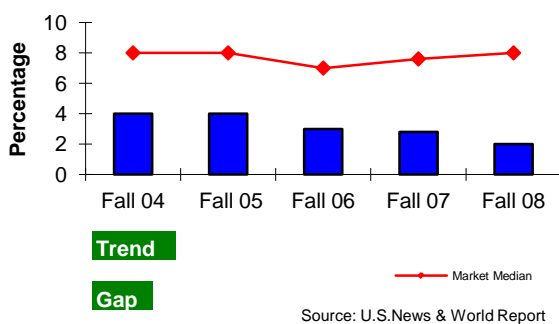
**UG Classes with <20 Students**



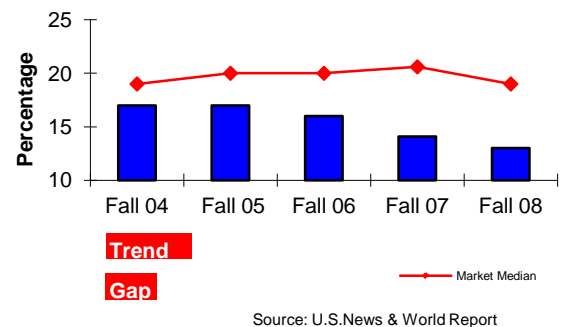
**6 Year Graduation Rate**



**UG Classes with >50 Students**

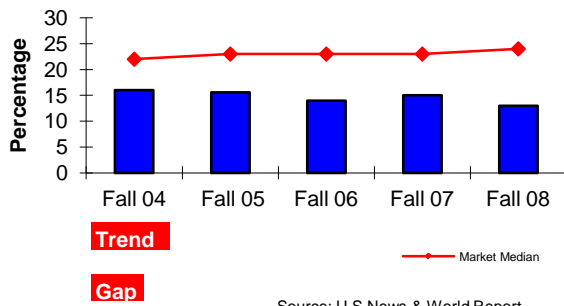


**Alumni Giving Rate**

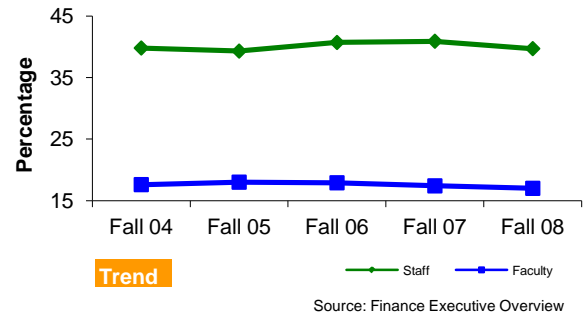


## QUALITY INDICATORS - DEMOGRAPHIC

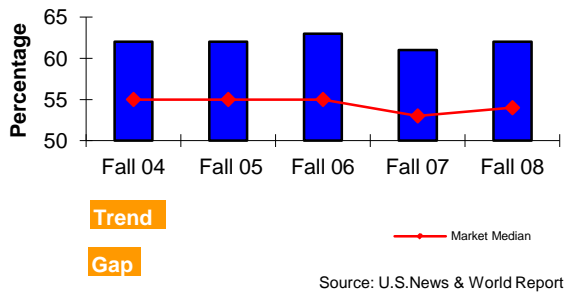
**Student Ethnic Diversity  
Non-caucasian Population**



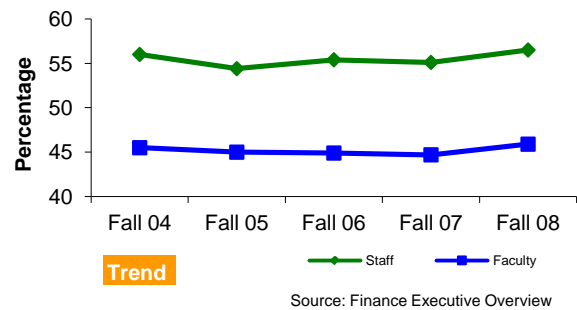
**Faculty & Staff Ethnic Diversity  
Non-caucasian Population**



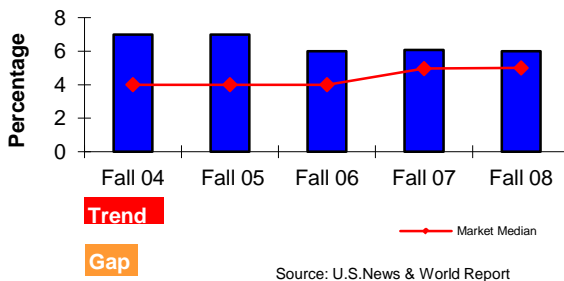
**Female Undergraduate Enrollment**



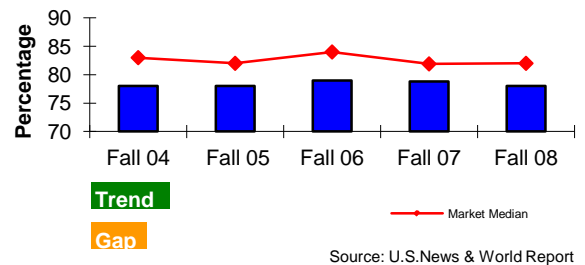
**Female Faculty & Staff**



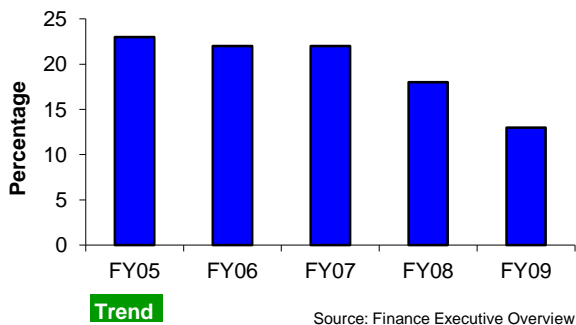
**International Undergraduate Enrollment**



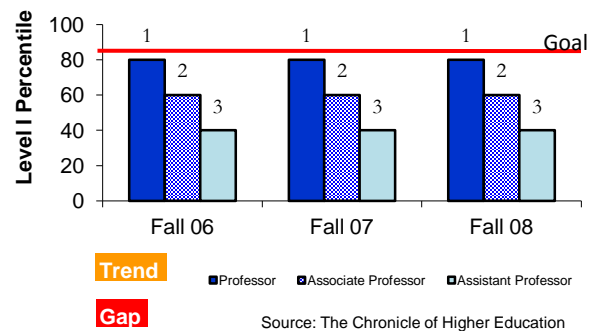
**% Full-time Faculty**



**Staff Turnover Ratio**

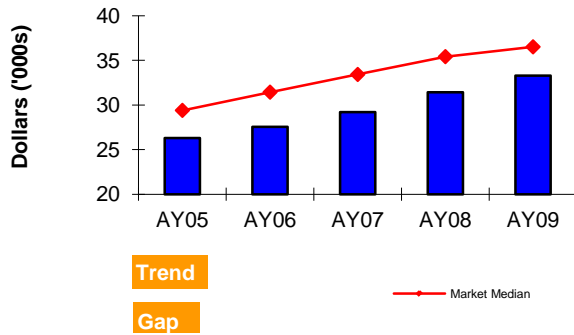


**[University] vs. AAUP Faculty Salary  
Goal = Level 1**



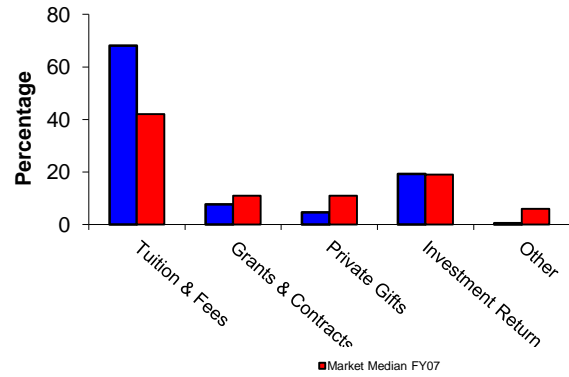
## FINANCIAL INDICATORS

### Undergraduate Tuition & Fees



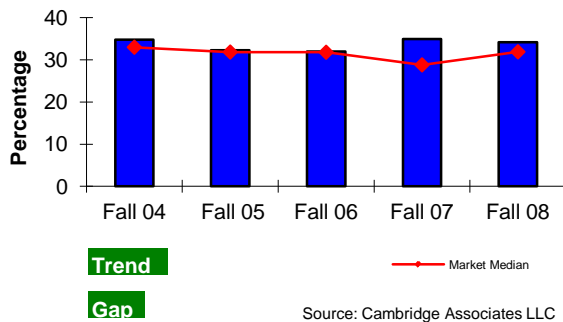
Source: The Integrated Postsecondary Data System

### % Distribution of Core Revenue



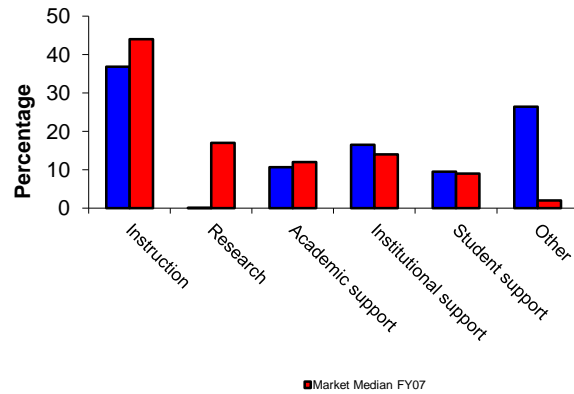
Source: Market - The Integrated Postsecondary Data System  
[University] - Financial Statement

### FT Freshmen Tuition Discount Rate



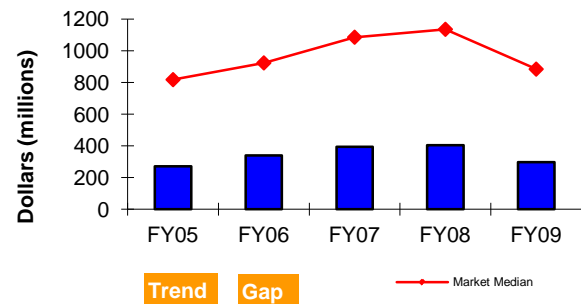
Source: Cambridge Associates LLC

### % Distribution of Core Expense



Source: Market - The Integrated Postsecondary Data System  
AU - Financial Statement

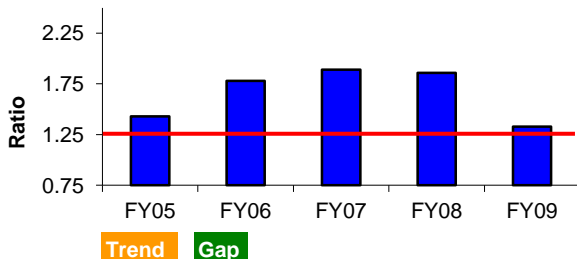
### Endowment Market Value



Source: FY05-FY06 Voluntary Support of Education  
FY07-FY09 Financial Statement

## FINANCIAL INDICATORS

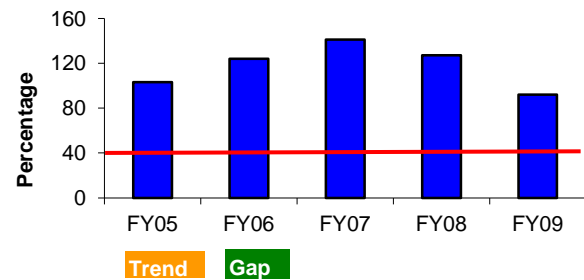
### Viability Ratio



Note: Benchmark Ratio is 1.25

Source: [University Benchmarking Study]

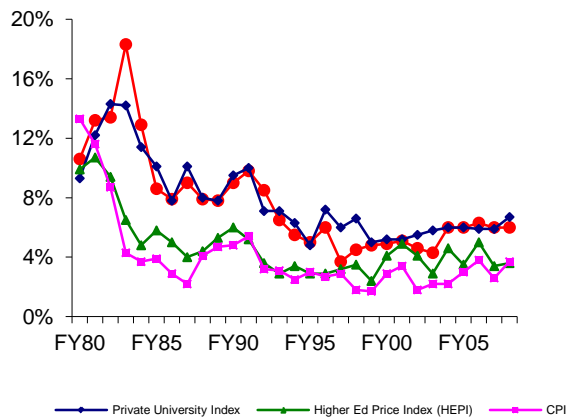
### Primary Reserve Ratio



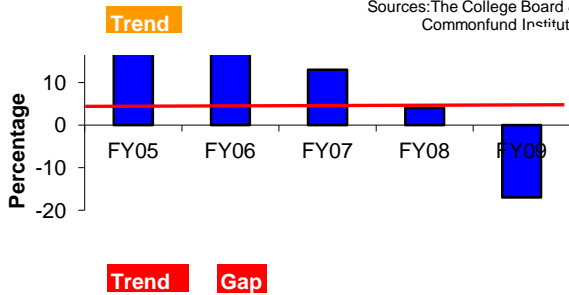
Note: Benchmark Ratio is 40

Source: [University Benchmarking Study]

### Higher Education Price Index (HEPI) vs. [University] Tuition % Increases



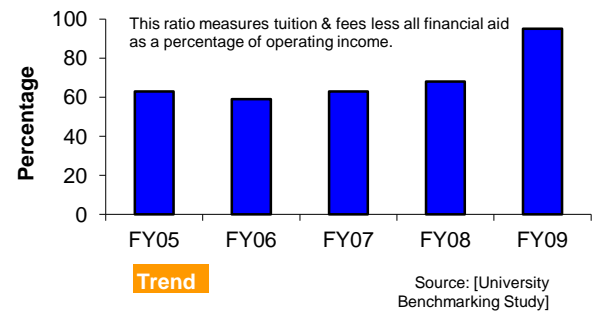
Sources: The College Board & Commonfund Institute



Note: Benchmark Ratio is 3-4

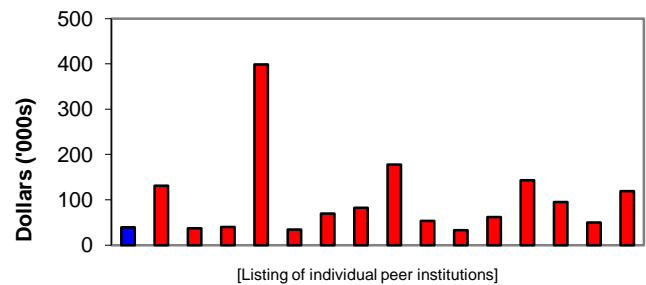
Source: [University Benchmarking Study]

### Net Tuition Dependency



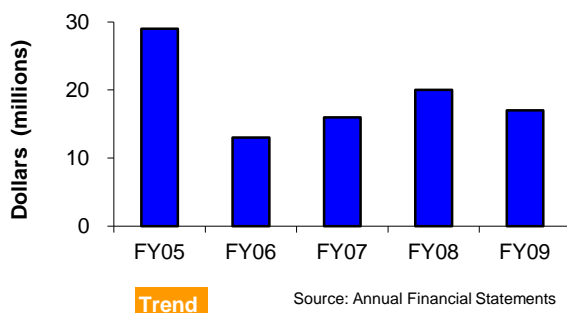
Source: [University Benchmarking Study]

### FY2007 Endowment per FTE



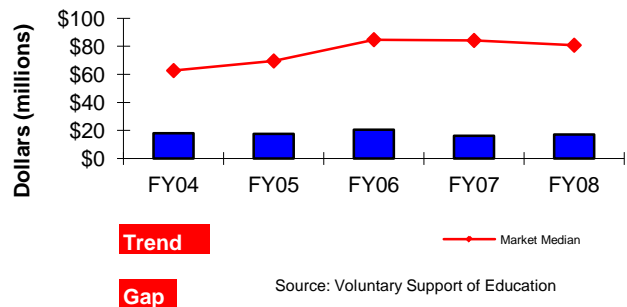
Source: The Integrated Postsecondary Data System

### Total Gifts Income



Source: Annual Financial Statements

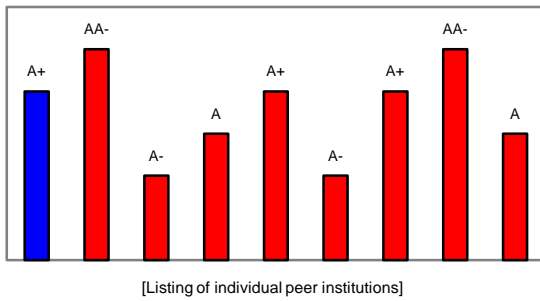
### Total Voluntary Giving



Source: Voluntary Support of Education

## FINANCIAL INDICATORS

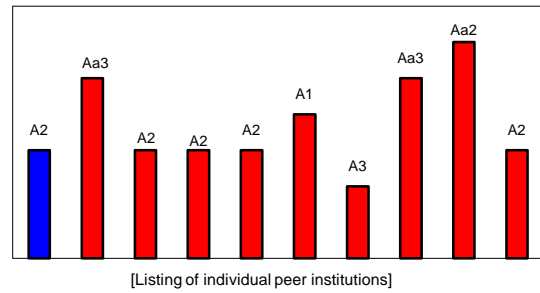
**FY2008 Standard & Poor's Financial Rating**



S&P upgraded [University]'s credit rating to A+ in September 2009.

Source: Finance Executive Overview

**FY2008 Moody's Financial Rating**



Source: Finance Executive Overview

- Trend indicates how we perform toward our goal over time.

- Gap indicates our current position in relation to our goal or the market median.

**Green**

**Satisfactory Performance**

**Yellow**

**Improvement Opportunities**

**Red**

**Requiring Immediate Attention**