

Lessons Learned in Developing Accountability Measures for a University System

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Developing Accountability Measures for a University System

Background

- President's initiative to promote transparency and accountability regarding overall performance
- "A Strategic Direction for the University System" outlined first cut of measures in October 2008
- Impetus: Association of Governing Boards
- University systems and performance measures

Developing Accountability Measures for a University System

University of Missouri Strategic Plan: Organized around Five Themes

- Teaching and Learning
- Research and Discovery
- Economic Development
- Community Service and Engagement
- Developing and Managing Human, Financial, and Physical Resources

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Principles of Identifying Measures

- Most meaningful measures under each theme
- Common data sources and definitions across campuses
- Externally-validated sources: IPEDS, AAUP, NSF, etc.
- Comparator peer data availability
- Include measures from Coordinated Plan for the Missouri Higher Education System and Voluntary System of Accountability

Developing Accountability Measures for a University System

Process of Developing Measures

- Task Force began August 2008
- Four campuses and UM System represented
- Meetings and video conferences during year
- Relied heavily on campus and UM System IR offices
- UM System IR maintained official report template
- Report template and core measures finished March 2009
 - Historical data, benchmarks, and comparator peer averages populated July 2009
 - Campuses given option to add campus-specific measures
 - Campus targets established August 2009

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Components of Notebook

- Guide to President's Accountability Measures
- Campus reports: historical data, indicators, targets, benchmarks, comparator peer averages, and sources
- Campus comparator peer groups
- Operational definitions and complete data sources

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Components of Campus Reports

- Three years of historical data
- Indicator: green, yellow, red
- Campus three-year target
- Benchmark (best in class)
- Comparator peer average
- Source
- Voluntary System of Accountability/Coordinated Plan component
- Data definition/notes

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Components of Notebook - Campus Reports

No.	Measures	FY07	FY08	FY09	Indicator (1)	Target (2)	Benchmark (3)	Peer Average	Source	Responsibility	VSA/CP (5)	Data Definition/Notes
	Teaching & Learning											
TL-1	Headcount enrollment by student level								IPEDS Fall / EMSAS Fall	IR&P/RS	VSA	
	Undergraduate	21,484	21,586	22,980	●	24,741		25,658				
	Graduate	5,598	5,708	6,024	●	6,481		7,573				
	Professional	1,102	1,111	1,126	●	1,123		1,418				MU professional programs: Law-JD, Medicine-MD, and Veterinary-DVM
TL-2	FTE enrollment by student level									IR&P/RS		Annual credit hours divided by 30/24 credit hours.
	Undergraduate	19,922	20,074	21,410	●	23,008		25,365	IPEDS 12-month			30 credit hours=1.0 FTE
	Graduate	3,866	3,904	4,124	●	4,432		6,563	IPEDS 12-month / Student Census			24 credit hours=1.0 FTE
	Professional	1,093	1,103	1,119	●	1,105		1,389	IPEDS Fall / EMSAS Fall			MU professional programs: Law-JD, Medicine-MD, and Veterinary-DVM Full-time=1.0 FTE, Part-time=0.5 FTE
TL-3	Freshman applicant acceptance rate	78%	82%	85%				57%	IPEDS Inst. Characteristics	IR&P/RS	VSA	First-time, degree seeking
TL-4	Freshman yield rate of those accepted	47%	47%	47%	●	45%		39%	IPEDS Inst. Characteristics	IR&P/RS	VSA	First-time, degree seeking
TL-5	Entering freshman GPA on high school core courses	3.35	3.34	3.32	●	3.35			Student Census	IR&P/RT		Full-time, degree-seeking, first-time-college (Fall or preceding Summer Semester). Audit-only are NOT included.
TL-6	Average ACT score entering freshman	25.3	25.4	25.5	●	25.5			EMSAS Fall	IR&P/RS		First-time degree-seeking. Educational quality
TL-7	Percent of entering students who come from the top 10% of their high school	27%	26%	25%					EMSAS Fall	IR&P/RS		First-time degree-seeking freshmen. Educational quality
TL-8	Student diversity by gender								IPEDS Fall	IR&P/RS		All students
	Men	47%	46%	46%				49%				
	Women	53%	54%	54%				51%				

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Campus Report Example

No.	Measures	FY07	FY08	FY09	Indicator (1)	Target (2)	Benchmark (3)	Peer Average (4)	Source
	<u>Teaching and Learning</u>								
TL-1	Headcount enrollment by student level								IPEDS Fall / EMSAS Fall
	Undergraduate	21,484	21,586	22,980	●	24,741		25,658	
	Graduate	5,598	5,708	6,024	●	6,481		7,573	
	Professional	1,102	1,111	1,126	●	1,123		1,418	
	<u>Developing and Managing Human, Financial, and Physical Resources</u>								
DM-1	Average ranked faculty salary	\$74,549	\$76,139	\$81,604	●	\$85,000	\$112,481	\$93,957	AAUP (Academe)
	(1) Indicator:								
	● Green = reach or exceed								
	● Yellow = making progress								
	● Red = no progress								
	(2) Target Indicator for most measures is for 3 full years out, FY12.								
	(3) Benchmark based on top performing peer institution in FY07.								
	(4) Peer Average based on FY07 peer institution data.								

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Components of Notebook - Operational Definitions

Teaching & Learning

No.	Measures	Source	Contact	Definition
TL-1	Headcount enrollment by student level	IPEDS Fall Enrollment survey, Part A http://www.umsystem.edu/ums/departments/fa/planning/students/compliance/ipedsef.shtml	Randy Sade, Institutional Research & Planning (UM)	<ul style="list-style-type: none"> • Graduate (doctorate-professional practice) is formally titled first-professional. • Included are students enrolled in courses creditable toward a diploma, certificate, degree, or other formal award. Students enrolled in courses that are part of a vocational or occupational program, including those enrolled in off-campus centers. High school students taking regular college courses for credit under their classification as recorded by the institution. Full-time students taking remedial courses if the student is considered degree-seeking for the purpose of student financial aid determination. Students from overseas enrolled in U.S. courses (e.g., online). Graduate students enrolled for thesis credits, even when zero credits are awarded, as these students are still enrolled and seeking their degree. • Not included are students enrolled exclusively in courses not creditable toward a formal award or the completion of a vocational program. Students taking Continuing Education Units unless they are also enrolled in courses creditable toward a degree or other formal award. Students exclusively auditing classes. Residents or interns in Doctor's - professional practice fields, since they have already received their Doctor's degree. Any student studying abroad (at a foreign university) if their enrollment at this institution is only an administrative record and the fee is nominal. Students in any branch campus located in a foreign country.

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Issues

- How many measures?
- Targets for all measures?
- Benchmark: best in class
- Interrelationships among different measures/targets
- Cost-benefit consideration on some measures
 - Identifying meaningful indicators that can be measured accurately

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Strategies for setting campus targets

- Campus sets targets on selected measures
- Same for each campus
- Reviewed and discussed annually by Chancellors & President

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Next Step

- Outside “audit” of measures
- Validity and reasonableness of measures, targets, benchmarks, and peer comparisons

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Annual Process

- Collaboration with campuses
- UM System IR responsible for maintaining and updating report
- Updates shared with Board of Curators in December
- Considered dynamic document

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Lessons Learned

- President lead effort
- Balancing involvement and speed
- Changes based on campus input

Developing Accountability Measures for a University System

Questions

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A Guide to the UM President's Accountability Measures

The goal of the University of Missouri President's Accountability Measures is to provide transparency and accountability regarding the University's overall performance. Closely tied to the University of Missouri System Strategic Plan, eighty measures are organized into five major themes:

- Teaching and Learning
- Economic Development
- Research and Discovery
- Community Service and Engagement
- Developing and Managing Human, Financial and Physical Resources

Data for the eighty measures will be reported for each campus. The campuses also have the option to add campus-specific measures. Each measure will have two years of campus historical data, the current year's data, and data that represents a peer group average or facsimile. In some cases, peer group data are not available and/or another source of comparable data is more appropriate (e.g., Moody's Ratings for the financial ratios; Association of University Technological Managers data base for the economic and technology measures, etc.). This information is used to help each campus set its three-year targets. To assess progress, the actual results for each measure will be compared to the campus targets annually. The annual update will be presented to the Board of Curators in December for the prior fiscal year.

Below is a brief description for each column in the accountability report:

- *No.*: represents the number of the measure within each theme for easy reference (e.g., TL-10, DM-5, etc.).
- *FY07, FY08, & FY09*: represents data from July 1 to June 30 (i.e., FY07: July 1, 2006–June 30, 2007)
- *Indicator*: a colored “stoplight” based on progress towards the three-year target:
 - Green: reach or exceed
 - Yellow: making progress
 - Red: no progress
- *Target*: what the campus wants to achieve within three years or by FY12. The *Target* can be above, below, or at the same level as the baseline. In some cases the campuses might be striving to improve or sustain current performance. In other cases the campuses may be acknowledging a planned reduction in outcomes. Not all measures have targets. Some measures are provided for information on trends only.
- *Benchmark*: represents the top performing peer institution in FY07. The availability of comparison data typically lags behind the most recent fiscal year. Benchmarks are provided for those measures where “best in class” has meaning.
- *Peer Average*: the arithmetic mean of the FY07 peer institution data and/or similar data source (e.g., Moody's financial ratios). The availability of comparison data typically lags behind the most recent fiscal year. Peer Averages are not provided for certain measures where the information would not be meaningful.
- *Source*: represents from where the data originated.

- *VSA/CP*: the measure mirrors a certain value in either the Voluntary System of Accountability Measure or the CBHE Coordinated Plan.
- *Data Definition/Notes*: is used to provide additional information and give a better perspective of the data being presented.

No.	Measures	FY07	FY08	FY09	Indicator (1)	Target (2)	Benchmark (3)	Peer Average (4)	Source	Responsibility	VSA/CP (5)	Data Definition/Notes
	Teaching and Learning											
TL-1	Headcount enrollment by student level								IPEDES Fall / EMSAS Fall	IR&P/RS	VSA	
	Undergraduate	21,484	21,586	22,980	○	24,741		25,658				
	Graduate	5,598	5,708	6,024	○	6,481		7,573				
	Professional	1,102	1,111	1,126	○	1,123		1,418				MU professional programs: Law-JD, Medicine-MD, and Veterinary-DVM
TL-2	FTE enrollment by student level									IR&P/RS		Annual credit hours divided by 30/24 credit hours.
	Undergraduate	19,922	20,074	21,410	○	23,008		25,365	IPEDS 12-month			30 credit hours=1.0 FTE
	Graduate	3,866	3,904	4,124	○	4,432		6,563	IPEDS 12-month / Student Census			24 credit hours=1.0 FTE
	Professional	1,093	1,103	1,119	○	1,105		1,389	IPEDS Fall / EMSAS Fall			MU professional programs: Law-JD, Medicine-MD, and Veterinary-DVM Full-time=1.0 FTE, Part-time=0.5 FTE
TL-3	Freshman applicant acceptance rate	78%	82%	85%				57%	IPEDS Inst. Characteristics	IR&P/RS	VSA	First-time, degree seeking
TL-4	Freshman yield rate of those accepted	47%	47%	47%	○	45%		39%	IPEDS Inst. Characteristics	IR&P/RS	VSA	First-time, degree seeking
TL-5	Entering freshman GPA on high school core courses	3.35	3.34	3.32	○	3.35			Student Census	IR&P/RT		Full-time, degree-seeking, first-time-college (Fall or preceding Summer Semester). Audit-only are NOT included.
TL-6	Average ACT score entering freshman	25.3	25.4	25.5	○	25.5			EMSAS Fall	IR&P/RS		First-time degree-seeking. Educational quality
TL-7	Percent of entering students who come from the top 10% of their high school graduating class	27%	26%	25%					EMSAS Fall	IR&P/RS		First-time degree-seeking freshmen. Educational quality
TL-8	Student diversity by gender								IPEDS Fall	IR&P/RS		All students
	Men	47%	46%	46%				49%				
	Women	53%	54%	54%				51%				
TL-9	Student diversity by ethnicity								IPEDS Fall	IR&P/RS		All students
	Under Represented	7.8%	7.9%	8.2%	○	8.2%		11.6%				
	Black, non-Hispanic	5.5%	5.6%	5.6%				4.8%				
	American Indian/Alaska Native	0.6%	0.6%	0.6%				0.6%				
	Hispanic	1.8%	1.8%	1.9%				6.3%				
	All Others											
	Nonresident alien	5.0%	5.1%	5.2%				7.5%				
	Asian/Pacific Islander	2.7%	2.6%	2.4%				12.0%				
	White, non-Hispanic	80.0%	80.8%	80.6%				63.9%				
	Race/ethnicity unknown	4.5%	3.6%	3.7%				4.9%				
TL-10	Total degrees awarded by level and ethnicity								IPEDS Completions	IR&P/RS	VSA; CP (1A:B)	
	Bachelors	4,736	4,779	4,855				5,791				
	Under Represented	319	359	351				657				
	All Others	4,417	4,420	4,504				5,134				
	Masters	1,350	1,421	1,506				1,742				
	Under Represented	62	77	71				145				
	All Others	1,288	1,344	1,435				1,597				
	Graduate Certificates	68	69	87				104				
	Under Represented	2	4	4				7				
	All Others	66	65	83				96				

No.	Measures	FY07	FY08	FY09	Indicator (1)	Target (2)	Benchmark (3)	Peer Average (4)	Source	Responsibility	VSA/CP (5)	Data Definition/Notes
	Education Specialist	36	34	57				25				
	Under Represented	5	3	12				3				
	All Others	31	31	45				23				
	Doctorate	293	326	306				518				
	Under Represented	21	21	22				33				
	All Others	272	305	284				485				
	Professional	289	303	307				399				MU professional programs: Law-JD, Medicine-MD, and Veterinary-DVM
	Under Represented	13	19	25				41				
	All Others	276	284	282				358				
TL-11	Six-year graduation rate by ethnicity								IPEDS Grad. Rate	IR&P/RS	CP (3A:1)	FY06=Fall 00 freshman cohort, FY07=Fall 01 freshman cohort, FY08=Fall 02 freshman cohort.
	All Students	67%	69%	Currently Not Available		70%	93%	75%				
	Under Represented	55%	57%	Currently Not Available		60%	90%	65%				
	All Others	68%	70%	Currently Not Available		71%	94%	76%				
TL-12	Four-year graduation rate by ethnicity								IPEDS Grad. Rate	IR&P/RS		FY06=Fall 00 freshman cohort, FY07=Fall 01 freshman cohort, FY08=Fall 02 freshman cohort.
	All Students	41%	41%	Currently Not Available		44%	84%	48%				
	Under Represented	28%	31%	Currently Not Available		35%	77%	36%				
	All Others	42%	42%	Currently Not Available		45%	85%	50%				
TL-13	First-year retention rate by ethnicity								EMSAS Fall	IR&P/RM		First-time full-time degree-seeking high school graduates.
	All Students	85%	85%	86%	○	86%						
	Under Represented	82%	84%	83%	○	85%						
	All Others	85%	86%	86%	○	87%						
TL-14	First-time, full-time, degree-seeking undergraduate transfer enrollment	955	891	985	○	1,082		1,407	EMSAS Fall / IPEDS Fall	IR&P/RS		Tied to VSA definition.
TL-15	First-time, full-time undergraduate transfer graduation rate	59%	61%	Currently Not Available		62%			Student Census	Campus IR	VSA	FY06=Fall 00 freshman cohort, FY07=Fall 01 freshman cohort, FY08=Fall 02 freshman cohort.
TL-16	Net cost of attendance as a percent of average family income	18%	20%	19%					UIDS Student Aid Management, FY08 PeopleSoft Students	IR&P/LCB	CP (1B:1)	Missouri, Resident, Undergraduate FAFSA filers only. Net COA= Budget-Total Gift Aid. Family income average is for students/families in the population; not the state family income.
TL-17	Average undergraduate debt burden at graduation (those with debt)	\$20,814	\$20,889	Currently Not Available					Common Data Set	IR&P/RS		Student debt burden, not parent.
TL-18	Percentage of graduating undergraduate class who borrowed at any time through any loan programs	61%	60%	Currently Not Available					Common Data Set	IR&P/RS		
TL-19	Percentage of grant/scholarship financial aid that meets need	46%	47%	45%					see #16	IR&P/LCB		Based on total gift aid awarded to FAFSA filers with need > 0.
TL-20	Pell Grant recipients as a percent of total undergraduate enrollment	14%	15%	15%					DHE 14-1 & IPEDS E-12	IR&P/RS		
TL-21	Student participation in study abroad	945	Currently Not Available	Currently Not Available				1,383	Open Doors Report	IR&P/RS	CP (2E:1)	Undergraduate and Graduate students.
TL-22	Student participation in internships for credit	1,065	1,108	1,200					Enrollment File	Campus IR	CP (2E:1)	Undergraduate students
TL-23	Student participation in academic service learning for credit	2,896	2,535	2,600					Enrollment File	Campus IR	CP (2E:1)	Undergraduate students
TL-24	Student participation in undergraduate research	2,191	2,176	2,200					Enrollment File	Campus IR	CP (2E:1)	Credit and non-credit. Affiliated with a course.
TL-25	Student engagement and satisfaction with learning experience	Not Admin	Not Admin	100%					NSSE	Campus IR	VSA; CP (1C:a)	Seniors rating their entire educational experience as good or excellent

No.	Measures	FY07	FY08	FY09	Indicator (1)	Target (2)	Benchmark (3)	Peer Average (4)	Source	Responsibility	VSA/CP (5)	Data Definition/Notes
TL-26	Pass rate on licensing exams								DHE Performance Indicators	Campus IR		Baccalaureate recipients. Educational quality
	Teacher education	93%	97%	100%	○	97%				IR&P/RS		Teacher Licensure and Cert. Exam (PRAXIS)
	Nursing	94%	91%	95%	○	91%		86%			CP (1C:3)	National Council Licensure Exam (NCLEX)
	Engineering	81%	81%	81%	○	81%		75%			CP (1C:3)	Fundamentals of Engineering Exam
	Accounting	85%	79%	79%	○	79%		47%			CP (1C:3)	Uniformed Certified Public Accountant Exam
	Health professions	100%	98%	100%	○	100%		82%			CP (1C:3)	American Registry of Radiologic Technologist, Nuclear Medicine Technology Certification Board, and National Board for Respiratory Care exams
TL-27	Student Awards - competitive and externally recognized awards	3	8	3				6	Various scholarship websites	IR&P/RS		Forbes definition: Truman, Marshall, Rhodes, Goldwater, & Fulbright, adjusted for enrollment. Not weighted.
TL-28	Student learning outcomes (scoring at or above 50th percentile on nationally normed test e.g., CAAP, CLA)	75%	67%	75%		75%			DHE Performance Indicators	IR&P/RS	CP (1C:1)	VSA within three years
TL-29	Fall semester credit hours per full-time ranked tenured-tenure track faculty	154	149	161	○	150			Student Census	IR&P/RM		Ranked includes full, Associate, and Assistant Professors. Instructional productivity. FTE based on contract. Data from Teaching load files; based on faculty who WERE assigned instructional activities.
TL-30	Fall section credits per full-time ranked tenured-tenure track faculty	10.0	9.2	9.8	○	10.0			Student Census	IR&P/RM		Ranked includes full, Associate, and Assistant Professors. Instructional productivity. FTE based on contract. Data from Teaching load files; based on faculty who WERE assigned instructional activities. Includes cross-listed sections and all data are w
TL-31	Percent of Tenured and Tenure Track faculty with Terminal Degrees	95%	95%	96%	○	95%			HR Census	IR&P/RM		Terminal degree is the highest degree in a field of study. US News definition.
	Research and Discovery											
RD-1	Total externally sponsored research expenditures	\$137,451 K	\$136,857 K	Currently Not Available		\$150,000 K		\$353,154 K	National Science Foundation	Office of Research	CP (2D:2)	
RD-2	Total federally funded research expenditures	\$108,328 K	\$108,131 K	Currently Not Available		\$130,000 K		\$261,122 K	National Science Foundation	Office of Research		
RD-3	Total research expenditures supported by business and industry	\$1,937 K	\$2,140 K	Currently Not Available		\$3,000 K		\$27,078 K	National Science Foundation	Office of Research		
RD-4	Total externally sponsored research expenditures per full-time ranked tenured-tenure track faculty	\$114,926	\$112,270	Currently Not Available		\$140,000	\$716,770	\$235,073	IPEDS HR & National Science Foundation	IR&P/RS		Ranked includes full, Associate, and Assistant Professors.
RD-5	Number of faculty awards, fellowships and memberships recognized in the Top American Research University published by the Center	14	Currently Not Available	Currently Not Available		25		61	The Center for Measuring Univ. Performance	IR&P/RS		National Academy Membership and Faculty Awards
RD-6	Number of books per PhD program faculty	Not Available	0.49	Currently Not Available					Academic Analytics	Campus IR		Contingent on Academic Analytics agreement
RD-7	Number of journal articles per PhD program faculty	Not Available	3.09	Currently Not Available					Academic Analytics	Campus IR		Contingent on Academic Analytics agreement
RD-8	Number of citations per PhD program faculty	Not Available	17.12	Currently Not Available					Academic Analytics	Campus IR		Contingent on Academic Analytics agreement
RD-9	Percent of Tenured and Tenure Track faculty engaged in externally sponsored research	38%	36%	31%	○	40%			HR Census & Finance data	IR&P/RM & UM Controller		
	Economic Development											
ED-1	Number of invention disclosures received	81	77	106	○	100		142	AUTM	R&ED	CP (2D:3)	
ED-2	Percentage of invention disclosures on which a new patent application was filed	37%	36%	25%	○	40%		54%	AUTM	R&ED		Using the AUTM definition, a "new patent application" is the first filing of the patentable subject matter and it could be either a provisional, non-provisional, or PCT filing claiming the US.
ED-3	Number of US patents issued	10	7	5	○	12		25	AUTM	R&ED		
ED-4	Total license/option agreement income	\$4,417 K	\$6,194 K	\$10,075 K	○	\$10,000 K		\$6,255 K	AUTM	R&ED		

No.	Measures	FY07	FY08	FY09	Indicator (1)	Target (2)	Benchmark (3)	Peer Average (4)	Source	Responsibility	VSA/CP (5)	Data Definition/Notes
ED-5	Number of license/option agreements that generated income	35.5	23.5	35	○	40		138	AUTM	R&ED		
ED-6	License/option agreement income per dollar of net patent expenses	\$13.31	\$10.33	\$14.67	○	\$15.00		\$5.57	AUTM	R&ED		
ED-7	Number of startups created around university technologies	1	4	2	○	4		4	AUTM	R&ED	CP (2D:4)	
ED-8	Number of license/option agreements executed	9	27	32	○	35		57	AUTM	R&ED		
Community Service and Engagement												
SE-1	Number of degrees and certificates awarded in METS related fields (math, engineering, technology, and science fields, including METS-related teacher education)	2,243	2,325	2,322	○	2,400		3,366	IPEDS Completions	IR&P/RS	CP (2B:1a)	METS includes CIP's 01 (Agriculture), 03 (Natural Resources), 11 (Computer & Info.), 14 (Engineering), 26 (Biological Sc.), 27 (Math & Stats), 40 (Physical Sc.), 42 (Psychology), & 51 (Health Sc.)
SE-2	Number of degrees and certificates awarded in key non-METS fields	2,237	2,114	2,349	○	2,250		1,457	IPEDS Completions	IR&P/RS	CP (2A:2)	
SE-3	Number of degrees and certificates awarded in health practitioner fields	551	612	641	○	650		605	IPEDS Completions	IR&P/RS	CP (2B:2a)	Non-veterinarian CIP 51 (Health Sciences)
SE-4	Number of cooperative extension contacts (direct and indirect)	1.2 M	1.3 M	1.1 M	○	1.3M		1.3 M	MU Extension	IR&P/RS		
SE-5	Number of extension continuing education enrollments								MU Extension	IR&P/RS		
	Credit	29,741	26,781	26,604	○	26,848						
	Non-Credit	84,498	80,901	80,104	○	81,103						
SE-6	University of Missouri Healthcare Out-patient clinic visits	548,634	510,897	520,000	○	560,000			UMHC Annual Report	IR&P/RS		Aggregate visits at all types of clinics at all sites.
SE-7	University of Missouri Healthcare Patient Satisfaction	86%	86%	86%	○	88%	91%	86%	Press Ganey	UMHC Service Quality		
Developing and Managing Human, Financial, and Physical Resources												
DM-1	Average ranked faculty salary	\$74,549	\$76,139	\$81,604	○	\$85,000	\$112,481	\$93,957	AAUP (Academe)	IR&P/RS		Full-, Associate, & Assistant Professors. Full-time instructional, 9- & 12-month contracts.
DM-2	Average benefit per full-time employee	\$11,204	\$11,740	Currently Not Available				\$19,841	IPEDS Finance & HR	IR&P/RS		Part C-Expenses, Employee fringe benefits (less Social Security)
DM-3	Faculty diversity by gender								IPEDS HR	IR&P/RS		Full- and part-time. Includes Hospital and Extension. Excludes graduate assistants.
	Men	61%	60%	60%				63%				
	Women	39%	40%	40%				37%				
DM-4	Faculty diversity by ethnicity								IPEDS HR	IR&P/RS		Full- and part-time. Includes Hospital and Extension. Excludes graduate assistants.
	Nonresident alien	10.1%	10.6%	9.1%				7.4%				
	Black, non-Hispanic	2.5%	2.6%	2.4%				2.9%				
	American Indian/Alaska Native	0.2%	0.2%	0.2%				0.4%				
	Asian/Pacific Islander	6.6%	7.0%	7.1%				9.9%				
	Hispanic	1.8%	2.0%	1.8%				3.1%				
	White, non-Hispanic	76.9%	77.3%	78.2%				74.9%				
	Race/ethnicity unknown	1.9%	0.3%	1.2%				1.4%				
DM-5	Staff diversity by gender								IPEDS HR	IR&P/RS		Full- and part-time. Includes Hospital and Extension. Includes graduate assistants.
	Men	38%	38%	38%				46%				
	Women	62%	62%	62%				54%				
DM-6	Staff diversity by ethnicity								IPEDS HR	IR&P/RS		Full- and part-time. Includes Hospital and Extension. Includes graduate assistants.
	Nonresident alien	5.9%	5.7%	5.5%				10.4%				
	Black, non-Hispanic	7.0%	7.3%	7.0%				6.1%				
	American Indian/Alaska Native	0.6%	0.7%	0.7%				0.5%				
	Asian/Pacific Islander	1.9%	2.1%	2.1%				7.6%				
	Hispanic	1.4%	1.6%	1.5%				6.2%				
	White, non-Hispanic	81.8%	82.3%	82.4%				66.4%				
	Race/ethnicity unknown	1.5%	0.3%	0.8%				2.7%				
DM-7	Average tuition benefit per full-time staff employee	\$113	\$121	\$119					HR data	UM Employee Relations		Includes Hospital and Extension.

No.	Measures	FY07	FY08	FY09	Indicator (1)	Target (2)	Benchmark (3)	Peer Average (4)	Source	Responsibility	VSA/CP (5)	Data Definition/Notes
DM-8	Staff turnover rate	17%	13%	10%	○	11%			HR data	UM Employee Relations		Includes Hospital and Extension.
DM-9	Faculty turnover rate	13%	7%	7%	○	10%			HR data	UM Employee Relations		Includes Hospital and Extension.
DM-10	State appropriations for operations per FTE student	\$7,484	\$7,737	\$7,737				\$9,351	Moody's	UM Controller	CP (3B:1iii)	
DM-11	State capital appropriations	\$0	\$0.8 M	\$0.8 M					Budget data	UM Controller	CP (3B:2)	
DM-12	State capital appropriations per FTE student	\$0	\$32	\$32					Budget data & Student Census	UM Controller	CP (3B:2i)	
DM-13	Total Federal Funding (non-financial aid)	\$123.0 M	\$124.9 M	\$124.9 M				\$301.3 M	IPEDS Finance	IR&P/RS	CP (3B:3)	
DM-14	Educational expenditures per FTE student	\$25,663	\$26,663	\$26,663				\$28,891	Moody's	UM Controller		
DM-15	Annual Fundraising	\$123.9 M	\$160.5 M	\$122.6 M	○	\$140.0 M			Advance data system	Campus Develop. Offices		
DM-16	Capital Campaign Progress	\$803.5 M	\$964.0 M	\$1,039.0 M					Advance data system	Campus Develop. Offices		
DM-17	Total endowment per FTE student	\$22,001	\$21,954	Currently Not Available				\$37,426	IPEDS Finance & 12-month Enrollment	IR&P/RS		
DM-18	Capital investment in facilities maintenance and repair	1.03%	1.00%	1.00%	○	1.00%			UM Facilities Annual Report	IR&P/RS		Percent of the replacement value of education and general buildings.
DM-19	Alumni giving percent	13%	18%	Currently Not Available		17%	24%	15%	US News	IR&P/RS		US News definition.
DM-20	Composite Financial Index	3.56	2.74	Currently Not Available					Finance data	UM Controller		
DM-21	Primary reserve ratio	0.51	0.50	Currently Not Available			1.28	0.63	Moody's	UM Controller		
DM-22	Viability ratio	1.45	0.95	Currently Not Available			4.30	1.80	Moody's	UM Controller		
DM-23	Return on net assets	7.1%	2.2%	Currently Not Available				9.4%	Moody's	UM Controller		
DM-24	Annual operating margin	3.8%	5.3%	Currently Not Available			11.2%	2.8%	Moody's	UM Controller		
DM-25	Proportion of operating expenses by function								IPEDS Finance	IR&P/RS		
	Instruction	35.8%	37.6%	Currently Not Available				37.4%				
	Research	25.3%	23.3%	Currently Not Available				27.6%				
	Public service	14.5%	14.6%	Currently Not Available				6.2%				
	Academic support	8.9%	9.3%	Currently Not Available				9.9%				
	Student services	5.7%	4.4%	Currently Not Available				4.0%				
	Institutional support	3.6%	3.1%	Currently Not Available		3.1%		7.4%				
	Operation & maintenance of plant	6.0%	7.5%	Currently Not Available				7.3%				
	Endnotes:											
	(1) Indicator:											
	● Green = reach or exceed											
	● Yellow = making progress											
	● Red = no progress											
	(2) Target Indicator for most measures is for 3 full years out, FY12.											
	(3) Benchmark based on top performing peer institution in FY07.											
	(4) Peer Average based on FY07 peer institution data.											
	(5) VSA = Voluntary System of Accountability Measure											
	CP = CBHE Coordinated Plan (Objective:Indicator)											
	NOTE: Some measures are populated with unofficial figures.											