



THE NATIONAL SYMPOSIUM ON STUDENT RETENTION

Sponsored by the Consortium for Student Retention Data Exchange at the University of Oklahoma



Benchmarking Retention Data: A Workshop

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New Orleans 2012

Purpose of Workshop

To describe an approach to defining competitive advantage and key vulnerabilities.

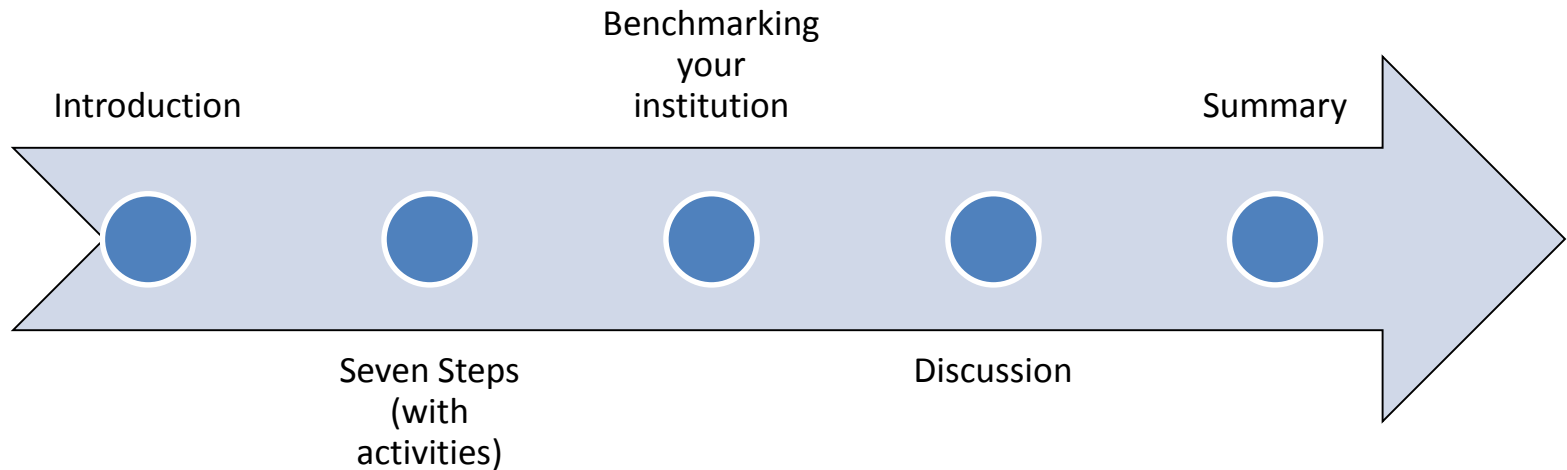
To identify performance indicators for identifying and monitoring key activities.

To show how to inform decisions by comparing indicators to similar institutions.

To identify key concepts and key steps through hands-on exercises in benchmarking.

To introduce use of a spreadsheet model to form comparator groups in benchmarking.

Organization



Part I

INTRODUCTION

Definition: Benchmarking

A **measurement** of the quality of an organization's policies, products, programs, strategies, etc., and their **comparison** with standard measurements, or similar measurements of its **peers**.

The **objectives** of benchmarking are to

- determine what and where improvements are needed,
- analyze how other organizations achieve high performance levels, and
- use this information to improve performance.

Why Use Benchmarking?

Evaluate Competition

Identify Strength and Weaknesses

Guide Policy Development

Provide Justification for:

- Budget Requests
- Salary Adjustments
- Teaching Loads
- Bragging
- Setting Tuition

Why Use Specific Groups?

PURPOSE

COMPARISON GROUP

Evaluate Operations

Reference => Aspirational Peers

Manage Enrollment

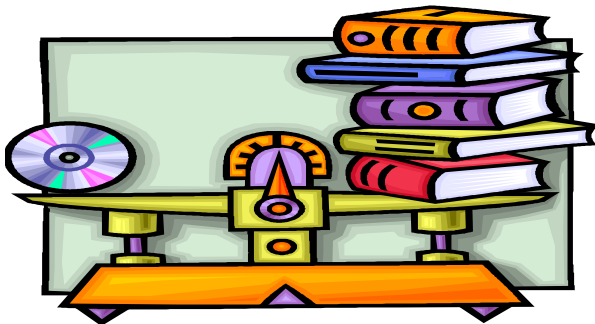
Competitors for Students
True/Reference Peers

Determine Faculty Salaries

Competitors for Faculty

Long Range Planning

Aspirational Peers
National Norm Groups



Selecting Comparison Institutions

Requires:

An understanding of overt and hidden political agendas.

An awareness of different types of comparison groups.

Understand that at many levels the methodology used to select the comparison group will reflect the politics surrounding the issue.

Select Institutions

Select the state you would like to filter the Institution list by:

All States -OR-

Select the Carnegie 2000 Classification to filter by:

All Carnegie 2000 Classifications -OR-

Select the Carnegie 2010 Classification to filter by:

All Carnegie 2010 Classifications -OR-

Select the Selectivity to filter by:

All Selectivity Groups

Pick between 5 and 20 institutions:

Option 1) Pick your institution as one of the 5 to 20 so your data is included in the aggregates of the peer report.

Option 2) Do not include your institution in the 5 to 20. Get your individual data by clicking "Get Your Institution's Data".

Arcadia U (PA)
Armstrong Atlantic State U (GA)
Assumption College (MA)
Augusta State U (GA)
Aurora U (IL)
Ball State U (IN)
Barry U (FL)
Baylor U (TX)

* Institutions with partial data or non-standard definitions
See documentation before making comparisons

Your Peer Selections :



Appalachian State U (NC)
Arizona State U (AZ)
Arkansas State U (AR)
Auburn U (AL)
Avila U (MO)
Bacone College (OK)

REMEMBER: Your institution is allowed one complimentary Peer Report, which is made up of the 4 pieces below (Detailed, Summary, Characteristics, and Documentation).

Make sure your selections are correct before creating any of the pieces of your report below.

Also, make sure to save all files to your hard drive.

<http://csrde.ou.edu/portal/index.cfm>

Part 2

THE SEVEN STEPS

Seven Steps

Audit Your Situation



Select Measures and a Standard



Collect Data (physically get the data)



Form Groups



Set Goals/Standards

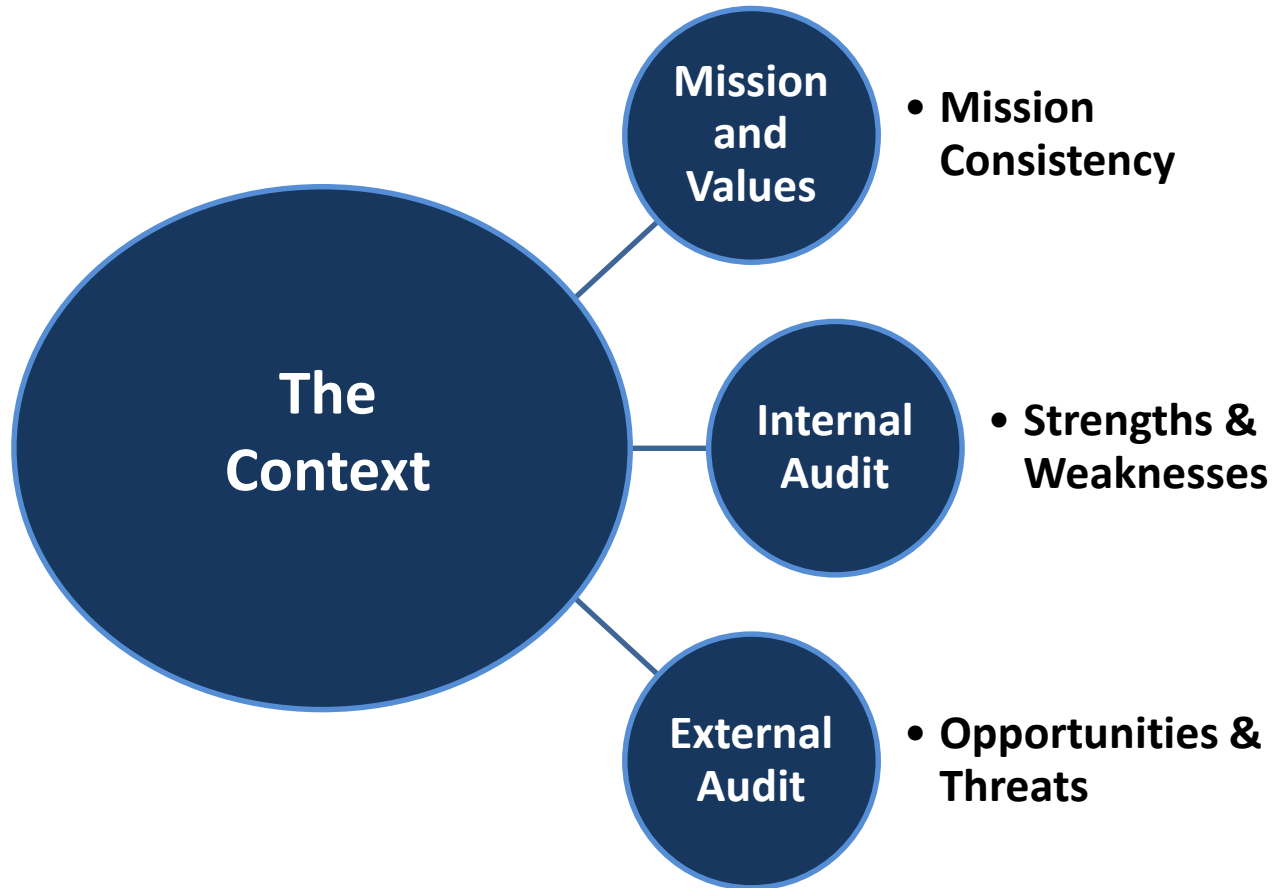


Monitor Outcomes



Interpret and Use Results

Step 1. Audit Your Situation



Matching the Contextual with Mission and Values

- You are 90% dependent on **tuition and fees**
- You are **rural and regional**
- You **offer Bachelors** with some Masters
- You heavily draw from **traditional** matriculates
- You have a 65% tenured, 80% TT, **90%FT faculty**
- Your goal is to **grow** 3-5 % for the next 5 years
and maintain selectivity
- **High School enrollment** is declining for 5 years

Identify Institutional Success Factors

Quality Education

- Student Success
- Viable Programs

Mission Enhancement

- Teaching, research, service
- Accessibility

Stakeholder Effectiveness

- Applicants,
- Donors
- Government

Financial Sustainability

- Operational Effectiveness and Efficiency
- Cash Flow
- Debt Management

Doing the Internal Audit

Does your institution use a resource-based approach to decision-making?

What is your business model?

Does the business model lead to the desired outcomes (e.g., financial well-being)?

Are your operations consistent with mission and values?

Do they lead to the desired student outcomes?

What does the literature reveal about your approach to institutional management?

Doing the External Audit

Who are your competitors? (Task environment)

What state or federal legislation and /or regulations are under discussion? (P)

What are the broader economic trends? (E)

What is the socio-economic status of students from the recruitment areas? (S)

What new types of technology are likely to impact the institution? (T)

What laws are important?(L)

Summing up the Findings

From SWAT to TOWS

- Threats
- Opportunities
- Weaknesses
- Strength

Organizing to Foster Communication About Institutional Context

	(S) Institution's Strengths	(W) Institution's Weaknesses
(O) External Opportunities (from outside the institution)	(1) Do strengths enable the institution to take advantage of opportunities?	(2) Can the institution address weaknesses by taking advantage of some external opportunity?
(T) External Threats (from outside the institution)	(3) Do strengths enable the institution to neutralize threats?	(4) Can the institution prevent weaknesses and threats combining to destroy institutional effectiveness?

Exercise 1

What do you consider in audit?

Internal Factors

1. _____
2. _____
3. _____

External Factors

1. _____
2. _____
3. _____

Who are the key stakeholder groups?

1. _____
2. _____
3. _____

Step 2. Select Measures

Represent key aspects of institution and institutional aspirations (Balanced Scorecard)

- Basic characteristics
- Student market
- Academic/faculty Aspects
- Financial situation

Use your purpose to help identify the measures that are selected

Quality of Measures

Reliable

Valid

Available in a
timely manner

Adequately
accurate

Identifying Core Competencies

Core competencies may be a function of

- Tangible Resources
- Intangible Resources
- Institutional Capabilities

Core competencies may have their roots in qualities that are hard to quantify

- Institutional History/Tradition
- Institutional Culture
- Institutional Location/Reputation

Capturing the Core Competencies

Valuable

- Students are willing to pay.

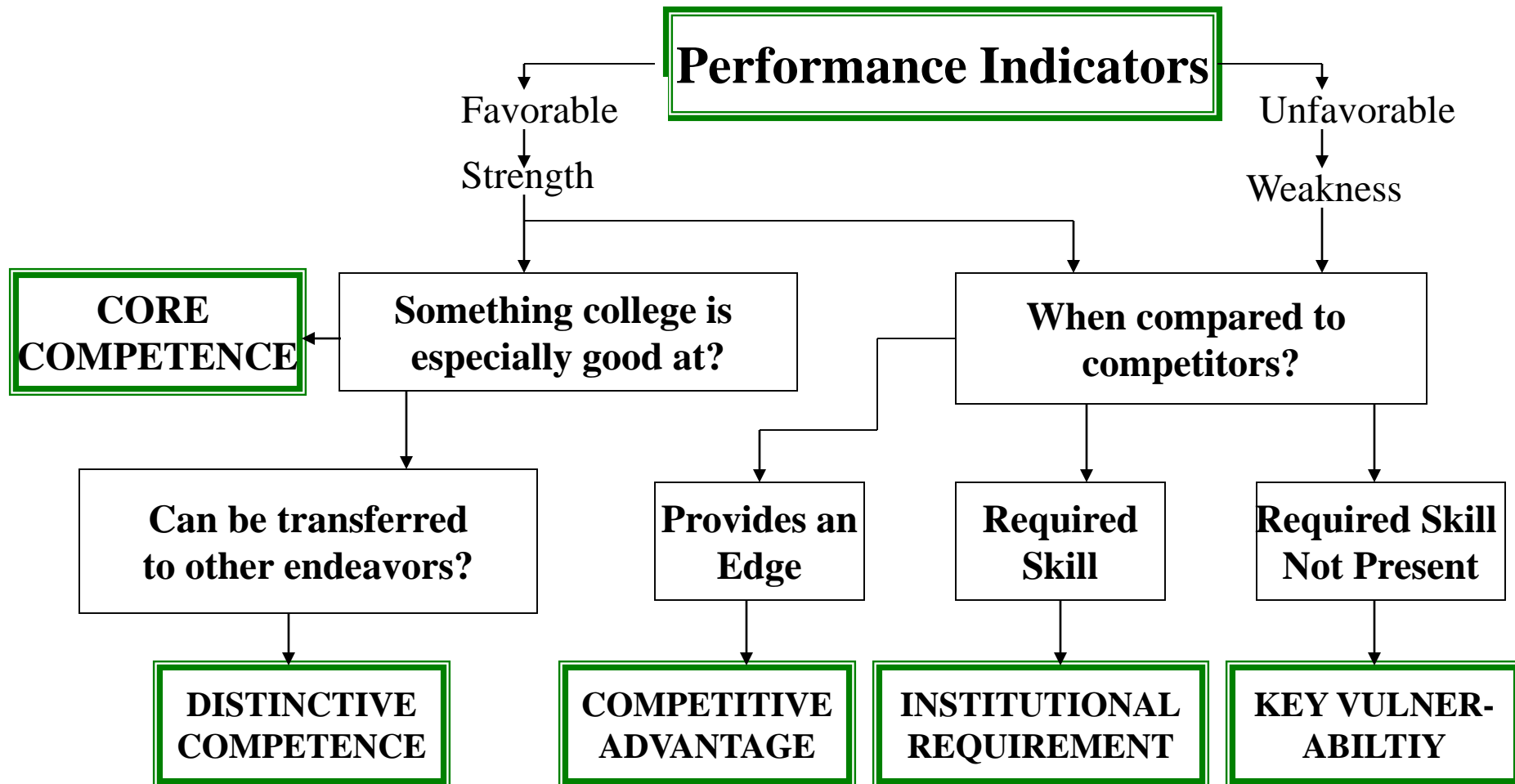
Rare

- A capability (or combination of capabilities) that is possessed by few of the competitors.

Costly to Imitate

- The competency may be linked, for example, to a socially complex network extending beyond graduation.

Comparing Success Factors to Identify Competence and Competitive Advantage



What to Consider

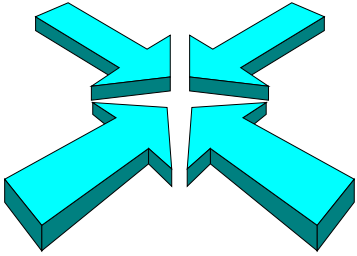
Balanced
Scorecard

- Customer
- Finance
- Process
- Development

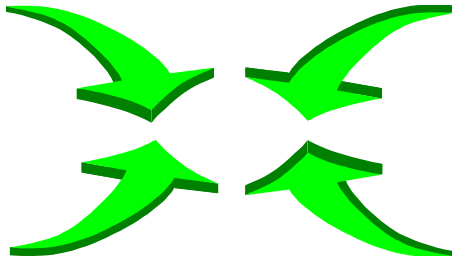
Domains and Variables - Examples

Domain

Tuition and Financial Aid



Students



Variables

Tuition and fees / FT students
Financial aid (Pell) / FTE students
Institutional aid as % of total aid
External aid as a % of total aid
% of students on work study
Inst. aid as a % of tuition + fee revenue

Full time equivalent enrollment
First time applicants
Acceptances as a % of applicants
Enrolled as a % of acceptances
Enrollment by ethnic status
Ratio of full-time to part-time

Exercise 2

1. What are your institution's Success Factors?

2. Identify related domains. _____

3. Propose measures. _____

4. What major problems will you need to overcome. _____

3. Obtain the data

Primary data from IPEDS

Other data sources include

- CSRDE
- ACT, College Board
- Education Trust
- NSSE
- CDS
- U-CAN, VSA, VAAS, US News,

Basic IPEDS Data Groups

Basic/Institutional Characteristics

Fall Enrollment

Financial Aid

Finance

Human Resources

Surveys (under the Data tool)

Library – every other year 2008, 2010, 2012

Accessing The Data Center

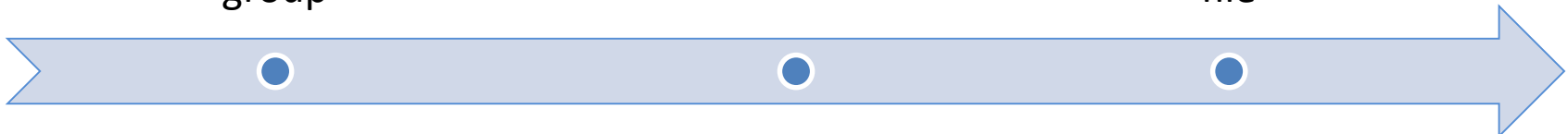
<http://nces.ed.gov/ipeds/datacenter/>

The screenshot shows the IPEDS Data Center website. At the top, there is a navigation bar for the National Center for Education Statistics, including a search bar and links for Publications & Products, Surveys & Programs, Data & Tools, Fast Facts, School Search, News & Events, and About Us. Below this is the IPEDS Data Center logo and a help call number. The main content area features a sidebar with options like 'LOOK UP AN INSTITUTION', 'COMPARE INDIVIDUAL INSTITUTIONS' (highlighted with a mouse cursor), 'RANK INSTITUTIONS ON ONE VARIABLE', 'VIEW TREND FOR ONE VARIABLE', 'CREATE GROUP STATISTICS', 'GENERATE PRE-DEFINED REPORTS', 'DOWNLOAD SURVEY DATA FILES', 'DOWNLOAD CUSTOM DATA FILES', and 'ExPT AND DFR'. A central text box explains that the selected option allows for retrieving and comparing data for multiple institutions. Below this are sections for 'Shortcuts...' and 'Use Other IPEDS Tools...', each with a list of available features.

Select the comparator
group

Download the
file

Select the variables –
code values



Select by Group or Variable

This is EZ Group

Click on a “+”
and options
appear

Select options
and gives you a
running total

If you save a
group (.uid)
have to login

Can save group
after form it

Compare individual institutions Provisional Release Data ([Change](#))

1. Select Institutions 2. Select Variables 3. Output

My Comparison Institution - None Selected ⓘ **ADD**

Select Institutions - You have selected 1 institution(s) **VIEW / MODIFY**

How would you like to select institutions to include in your data file/report?

[By Names or UnitIDs](#) [By Groups](#) [By Variables](#) [By Uploading a File](#)

Data Collection: 2011 [[change year](#)]

Select

First Look Universe ⓘ Title IV participating ⓘ U.S. only All institutions

Special missions (if any)

Historically Black College or University Tribal College Land Grant Institution

0 institutions **Search**

Special characteristics [Expand/Collapse all](#)

State or other jurisdiction Geographical region

Sector Degree-granting status

Institutional category Degree of urbanization (Locale) ⓘ

Institution size category Has full-time first-time undergraduates

All programs offered completely via distance education

Highest degree offered

Carnegie Classification 2010: Basic

Reporting method (academic/hybrid/program)

Criteria Summary

Data Center ExPT Tool

ExPT and DFR

Data Feedback Reports

1. Comparison Institution 2. Data Report 3. Comparison Group 4. Figures **5. Output**

My Comparison Institution - DePaul University CHANGE

Data Report Type - Create a Custom Data Feedback Report CHANGE

Comparison Group - You have selected 99 institution(s) CHANGE VIEW

Figures selected - You have selected 15 figures. CHANGE

Download PDF

Description of comparison group definition (optional)

Download

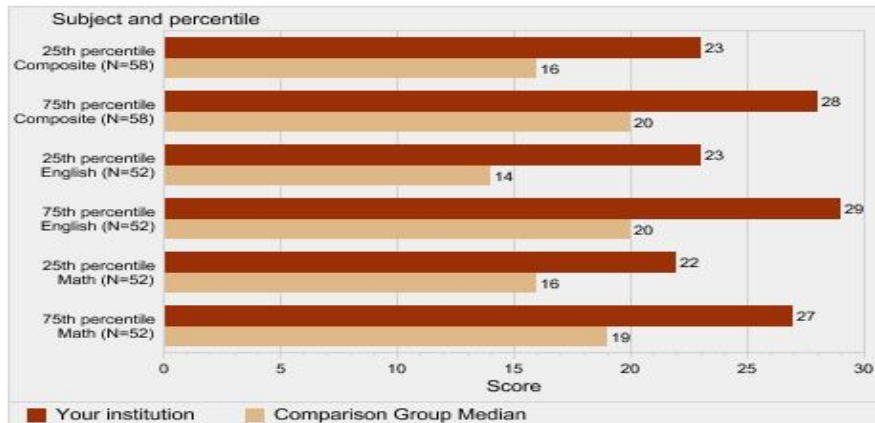
Cover Content

Comparison Groups

Preview Charts

Methodological Notes

Figure 1. Percentile ACT scores of first-time, degree/certificate-seeking undergraduate students: Fall 2011



NOTE: Test score data are presented only for institutions that do not have an open admission policy, and apply to first-time, degree/certificate-seeking undergraduate students only. Institutions report test scores only if they are required for admission. N is the number of institutions in the comparison group.
SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2011, Institutional Characteristics component.

New Tools for Benchmarking Students

Student outcomes

- Identify characteristics of the students of interest
- Use these new tools to look at the outcomes of those students
- Compare their outcomes with outcomes from your students.

More Student Characteristics




GROUP	WORK SPACE														
<input type="checkbox"/> POSTSECONDARY QuickSelect by dataset name ▶ <input type="checkbox"/> Students <input checked="" type="checkbox"/> Beginning college students <input checked="" type="checkbox"/> All undergraduates <input checked="" type="checkbox"/> Graduating college seniors <input checked="" type="checkbox"/> Graduate students <input checked="" type="checkbox"/> Faculty <input checked="" type="checkbox"/> PRE-ELEMENTARY <input checked="" type="checkbox"/> Students	<div style="border: 1px solid black; padding: 5px;"> <p>Group All undergraduates</p> <p>Students who... Older years</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #c0c0c0;">were undergraduate students when interviewed in 2008.</th> <th style="background-color: #c0c0c0;">were undergraduate students when interviewed in 2004.</th> <th style="background-color: #c0c0c0;">were undergraduate students when interviewed in 2000.</th> </tr> </thead> <tbody> <tr> <td style="background-color: #f0f0f0;"> <p>Includes:</p> <ul style="list-style-type: none"> • General demographics • Types of aid and amounts received • Cost of attending college • Combinations of work, study, and borrowing • Enrollment patterns </td> <td style="background-color: #f0f0f0;"> <p>Includes:</p> <ul style="list-style-type: none"> • General demographics • Types of aid and amounts received • Cost of attending college • Combinations of work, study, and borrowing • Enrollment patterns </td> <td style="background-color: #f0f0f0;"> <p>Includes:</p> <ul style="list-style-type: none"> • General demographics • Types of aid and amounts received • Cost of attending college • Combinations of work, study, and borrowing • Enrollment patterns </td> </tr> <tr> <td style="background-color: #f0f0f0;"> Approximate number of respondents: 113,500 </td> <td style="background-color: #f0f0f0;"> Approximate number of respondents: 79,900 </td> <td style="background-color: #f0f0f0;"> Approximate number of respondents: 50,000 </td> </tr> <tr> <td style="background-color: #f0f0f0;"> <p>Study name: National Postsecondary Student Aid Study: 2008 Undergraduates Visit study website View technical information View all variable information, by subject View all variable information, by variable name</p> </td> <td style="background-color: #f0f0f0;"> <p>Study name: National Postsecondary Student Aid Study: 2004 Undergraduates Visit study website View technical information View methodology report View all variable information, by subject View all variable information, by variable name</p> </td> <td style="background-color: #f0f0f0;"> <p>Study name: National Postsecondary Student Aid Study: 2000 Undergraduates Visit study website View technical information View methodology report View all variable information, by subject View all variable information, by variable name</p> </td> </tr> </tbody> </table> </div>			were undergraduate students when interviewed in 2008.	were undergraduate students when interviewed in 2004.	were undergraduate students when interviewed in 2000.	<p>Includes:</p> <ul style="list-style-type: none"> • General demographics • Types of aid and amounts received • Cost of attending college • Combinations of work, study, and borrowing • Enrollment patterns 	<p>Includes:</p> <ul style="list-style-type: none"> • General demographics • Types of aid and amounts received • Cost of attending college • Combinations of work, study, and borrowing • Enrollment patterns 	<p>Includes:</p> <ul style="list-style-type: none"> • General demographics • Types of aid and amounts received • Cost of attending college • Combinations of work, study, and borrowing • Enrollment patterns 	Approximate number of respondents: 113,500	Approximate number of respondents: 79,900	Approximate number of respondents: 50,000	<p>Study name: National Postsecondary Student Aid Study: 2008 Undergraduates Visit study website View technical information View all variable information, by subject View all variable information, by variable name</p>	<p>Study name: National Postsecondary Student Aid Study: 2004 Undergraduates Visit study website View technical information View methodology report View all variable information, by subject View all variable information, by variable name</p>	<p>Study name: National Postsecondary Student Aid Study: 2000 Undergraduates Visit study website View technical information View methodology report View all variable information, by subject View all variable information, by variable name</p>
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College Peer Tool

http://www.collegeresults.org/search2a.aspx

View Favorites Tools Help

Yahool Search SEARCH



Home Choose a College Compare Colleges **Advanced Search**

Year Selected: 2010

The most current data year is the default, but you may choose to search for [colleges](#) based on previous years' data.

2010

- Location
- College Characteristics
- Admissions and Cost
- Student Characteristics
- Student Outcomes**

STUDENT OUTCOMES

Refine your search [for colleges](#) based on their students' success rates.

Graduation Rate

Step 1 - Choose Race/Ethnicity and Gender

Race/Ethnicity Gender

Step 2 - Choose Graduation Rate Timeframe

Timeframe

Step 3 - Choose Graduation Rate Range

Between and

Entering Freshman to Sophomore Retention Rate Between and

Outbound Transfer Rate Between and

Percent of undergraduate degrees awarded in Science, Technology, Engineering or Mathematics Between and

<http://www.collegeresults.org/search2a.aspx>

Exercise 3

1. Using EZ Groups at IPEDS Data Center, select characteristics for basically similar institutions.
2. Select some basic institutional characteristics.
3. Download group (.uid file)
4. What student benchmark studies would you like to do with this group? _____

Step 4. Form Groups

Three purposes for groups

- Peers
- Competitors
- Aspirants

Four basic types of groups

- Pre-formed
- Judgmental
- Statistical
- Hybrid

Purposes of Comparison Groups

Peer

- Typically similar in key aspects such as mission, size, and complexity.
- May need different peers for different aspects of your institution.

Aspirational

- Dissimilar but reflect characteristics that the home institution desires to have.
- If presented as a peer group, risk your credibility.

Competitor

Organizations competing with your institution for students, faculty, and/or financial resources.

May not be similar in mission, size, or complexity.
(Similarity may or may not be an issue.)

Competition for Students

Price –

- Cost, Opportunity

Time and effort

- Required to degree

Value added –

- Social, economic, intellectual, personal

Convenience –

- Attendance, Logistics

Brand loyalty –

- Reputation, based on what you promise, communicate, and deliver

Types of Groups



Predetermined

- *Natural*
 - Belongs to a highly visible grouping
 - Specific comparable characteristic needs to be evaluated.
- *Traditional*
 - group membership based on historical relationships
 - A familiar association and maybe widely accepted.

Classification-based

- A grouping used for national or regional reporting – e.g. Carnegie Classification.
 - Tend to have credibility and are usually recognized.
 - Typically based on one or two characteristics (with wide variability on other institutional dimensions).

Types of Groups

Jurisdictional

- Share the same political or legal jurisdiction.
- Typically this type of comparison group is used in politically driven situations even though the institutions have little else in common.

Methodology for Forming Group

Judgmental

- Select predetermined group
- Make adjustments
- Set criteria
- Engage key individuals in conversation
- Ask expert(s) and users

Statistical

Grouping or agglomerative

Depends on proximity

Technical Issues

What size(s) and how many groups are needed?

What are the critical areas of concern and what critical indicators/windows exist?

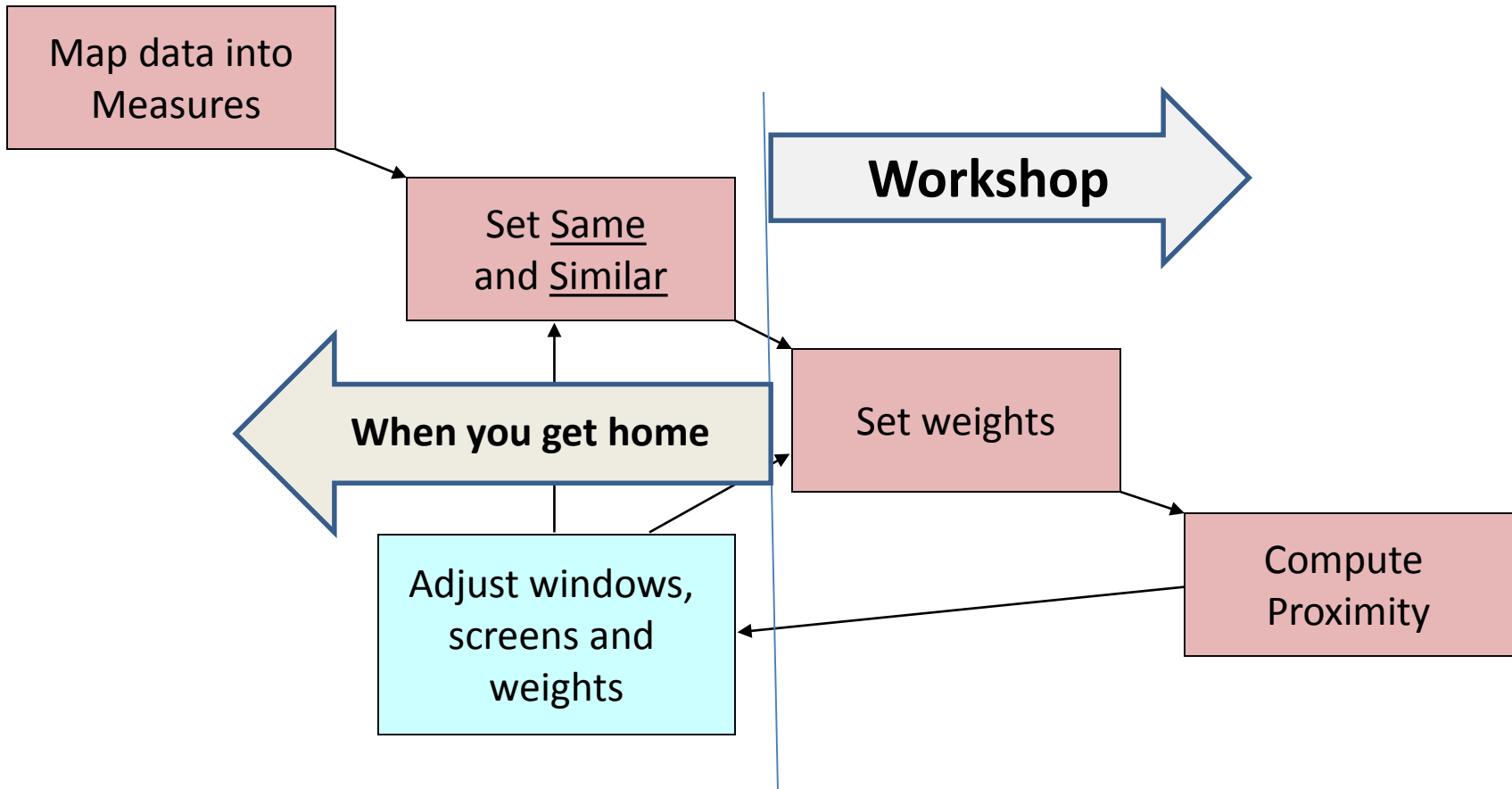
What objective measures should be used? Magnitude, Performance ratios, or Proportional Profiles?

Should weighting be by domain area or by variable?

What is the appropriate role for reasoned review?

What is the appropriate improvement process? Success measures, refinement process, and strategic use?

Model Process



Reference Group Model



Steps:

1. Go to the **BSC** sheet and select an institution.
2. (They are in alphabetic order)
3. <Copy - Paste Values> into the 2nd row of the sheet **Proximity**
4. Go to **Neighbors** and < custom sort> based on column BE labeled Proximity. Make sure you check the box “My data has headers”.
5. If you want to exclude certain groups (like schools from the west) create a copy of **Neighbors** such as **Neighbors(2)** . Sort this sheet on what you want to set as a screen and delete the ones you don’t want. Then <custom sort> on column BE. Make sure you check the box “My data has headers”.
6. **BSC** and **Proximity** should always be sorted in alphabetic order.
7. To change the importance of a measure, change the weight on row 9 of Proximity.

Exercise 4

Who is in your:

- Competitor Group _____

- Peer Group _____

- Aspiration (Preferred Peer Group) _____

- Traditional Group _____

Step 5. Setting Goals

Sustainable

Competitive

Goals must be

- Sufficient
- Measurable
- Actionable
- Reachable
- Timely

Goals and KPIs

Identify Key Performance Indicators (KPIs).

- Internal outcome measures that are unique to the campus

Identify those measures that are available on comparable institutions.

Benchmark KPIs that are available.

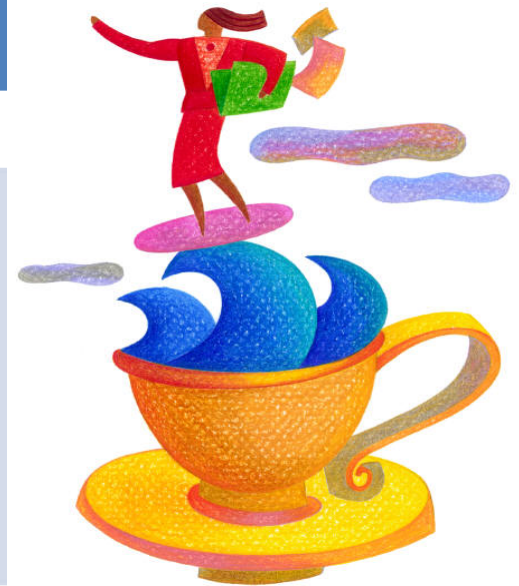
Good things should go up and bad things should go down.

Defining KPIs

Important indicators that measure institutional performance and activities

Typical categories

- Finance
- Enrollment
- Student Success
- Faculty and Staff



Uses of KPIs

Provide a balanced view of the situation

Identify issues and establish progress

Motivate the proper actions

To interpret

- Trends over time
- External comparisons
- Internal comparisons
- Ideal standard.

KPIs and Performance Reporting

To report performance outcomes to

- Outside agencies – e.g., Federal and State Governments
- Accreditation agencies – Regional and Professional
- Institutional users – Program Reviews, Student Learning Outcomes Assessment, Strategic Planning

Characteristics of Good KPIs

Sufficient and relevant to key issues

Reliable, timely, and inexpensive

Ideal standard

Strategically relevant



Steps for Developing KPIs



Start with a **critical** success factor

- Example: The college must remain financially healthy.

Identify the critical components

- Example: Financial Health
 - Composite Financial Indicator
 - Primary Reserve – Assets to expenses
 - Viability – Assets to debt
 - Return on Net Assets – Increased Assets
 - Net Income Ratio – “Percent Profit”

See Appendix for additional information

Burke & Minassians's Commonly Used KPIs

Funding	<ul style="list-style-type: none">• State appropriations per FTE student	Articulation	<ul style="list-style-type: none">• Transfers between 2- and 4-year institutions
Affordability	<ul style="list-style-type: none">• Tuition minus financial aid as % median income	Completion	<ul style="list-style-type: none">• 3 and 6 year graduation rates
Participation	<ul style="list-style-type: none">• % HS graduates going to higher education	Sponsored research	<ul style="list-style-type: none">• \$ of external funding
Degree attainment	<ul style="list-style-type: none">• Degrees awarded	Student development	<ul style="list-style-type: none">• Alumni survey on college value added
Job placements	<ul style="list-style-type: none">• Jobs obtained by college graduates	College-school collaboration	<ul style="list-style-type: none">• % Fresh with college prep

See Appendix for additional information
Burke and Minassians, NDIR, 116, 2002

Exercise 5

- Create a copy of **Neighbors**. Select the 25 institutions most similar to yours. Compute the median `<=median()>` on the measures.
- How does your institution compare to the 25 most similar institutions on Graduation Rates and Retention?

- What other variables would you like to have?

Step 6. Monitor the Outcomes

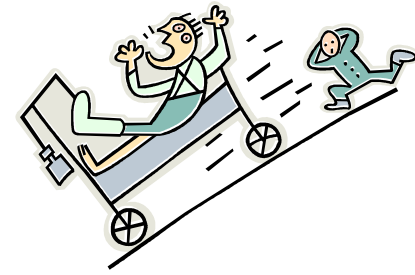


Understand the Red Flags

Report using some combination of words, tables, and/or graphics

- For example, when the user is a “picture” person
 - Develop a visual representation
 - Show performance of institution relative to time and relative to others
 - Include quartiles or ranges where possible
 - Use in sets based on type of data
 - Use inserts for other types of users

External Public Policy Issues



Price of Tuition

Board Accountability (IRS)

Student Financial Aid

Tax Policy (Related to Giving and Tuition)

Access and Success

Support for Scientific Research

Student Learning
(Accountability)

Global Competitiveness

Consumer Information
“Transparency”

Aligning P-20 Education

See Appendix for additional information

Public Policy Paper Series, AGB, April 2007

Watching for Red Flags

KPI outcomes that indicate to Planners that a problem might be developing or already has developed

Areas of Concern

- Financial Assets
- Student Assets
- Learning Assets
- Staff Assets



When to Be Concerned

Financial Assets:
Perhaps you should be concerned if

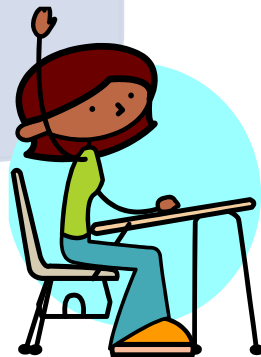
- Current expenditures $>$ Current revenues
- Key revenue streams decrease while expenditures increase
- Student aid as proportion of tuition & fees increases
- The ratio of reserves to operating expenses decreases
- The discount rate increases
- Major secondary revenue streams decrease



When to Be Concerned

Student Assets :
Perhaps you should be concerned if:

- Decreasing applicants or yield
- Increasing difference in qualifications of accepted not-enrolled & enrolled
- Decreasing graduation rates
- Increasing number of students not returning
- Decreases in % of entering students in top 10% of HS class



When to Be Concerned

**Learning
Assets :**
*Perhaps
you
should be
concerned
if:*

- Cost of instruction increases compared to price
- Cost per credit hour increases
- Faculty salaries increase relative to tuition revenue
- Faculty salary decrease relative to the cost-of-living
- No new academic programs



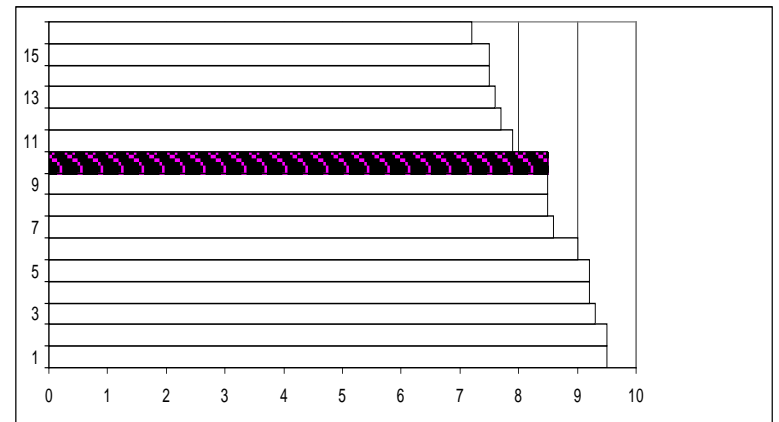
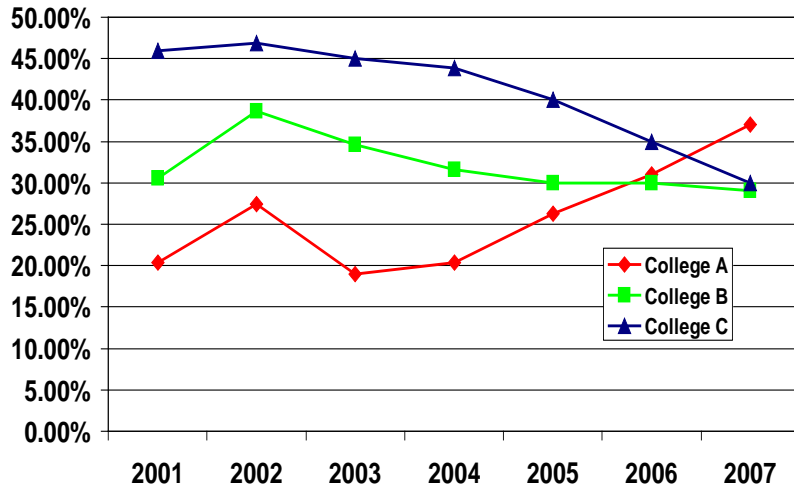
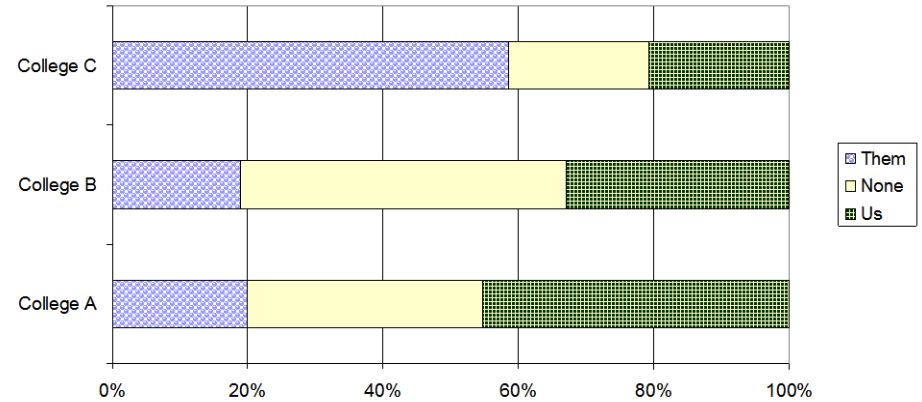
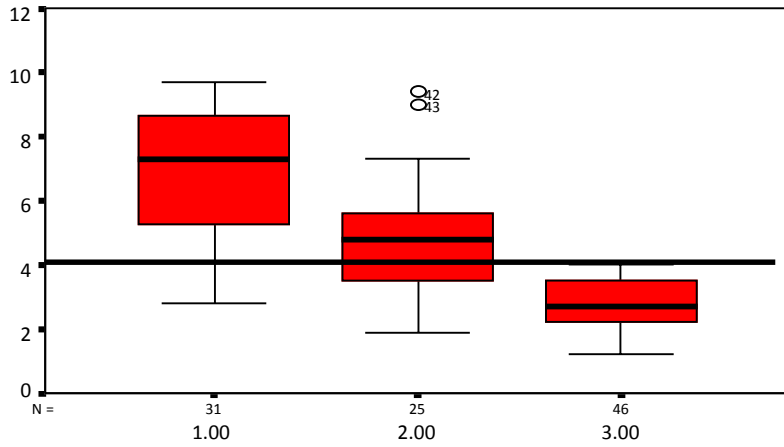
When to Be Concerned

**Staff
Assets:**
*Perhaps
you
should be
concerned
if:*

- Faculty (academic staff) to non-academic staff ratio drops
- Tenure ratio increases with declining enrollment
- Proportion of non-faculty increases
- Non-retirement retention increases
- Benefits cost relative to salary increases.



Display the data



Dashboard





UM Student Dashboard, 2005

Admission Indicators

Top HS Decile  Mid. of Peers 62%	Average SAT  Below Peers 1260	Accept Rate  Mid. of Peers 46%	Yield Rate  Below Peers 26%
---	---	---	---





Student Body Indicators


NF Enrollment  Mid. of Peers 2,277	UG Enrollment  Mid. of Peers 10,537	Grad. Enrollment  Below Peers 3,219	Prof. Enrollment  Mid. of Peers 1,918
---	--	---	--

Doctoral Degrees  Below Peers 156	NF Retention Rate  Below Peers 89%	Graduation Rate  Below Peers 71%	% On-campus-DUG  Mid. of Peers 41%
---	--	--	---

% Female-UG  Above Peers 57%	% Minority-UG  Above Peers 43%	% Int'l-UG  Above Peers 7%	% Out-of-State-DUG  Mid. of Peers 46%
--	--	--	--

Financial Aid Indicators*

% Rec. Any Aid  Above Peers 87%	% Rec. Inst. Grts.  Above Peers 78%	Avg. Inst. Grants  Mid. of Peers \$15,123	% Rec. Loans  Mid. of Peers 49%
---	---	--	--

Average Loans  Above Peers \$7,015
--

* Comparisons for all Financial Aid Indicators are limited to the nine private peer institutions included in the list below.

Arrow (up/down) means UM trend is significantly higher/lower over the prior 6-year period. A flat line means no significant trend.

"Above Peers"/"Below Peers" means that UM is significantly above/below the mean of 12 peer institutions listed below using last year's data (not shown). "Mid. of Peers" means UM is not significantly diff. from the mean. Green means a positive trend/comparison. Red means a negative trend/comparison. Neutral trends are shown in black.

Peer institutions: Institution A, Institution B, Institution C, Institution D, Institution E, Institution F, Institution G, Institution H, Institution I, Institution J, Institution K, Institution L, Institution M

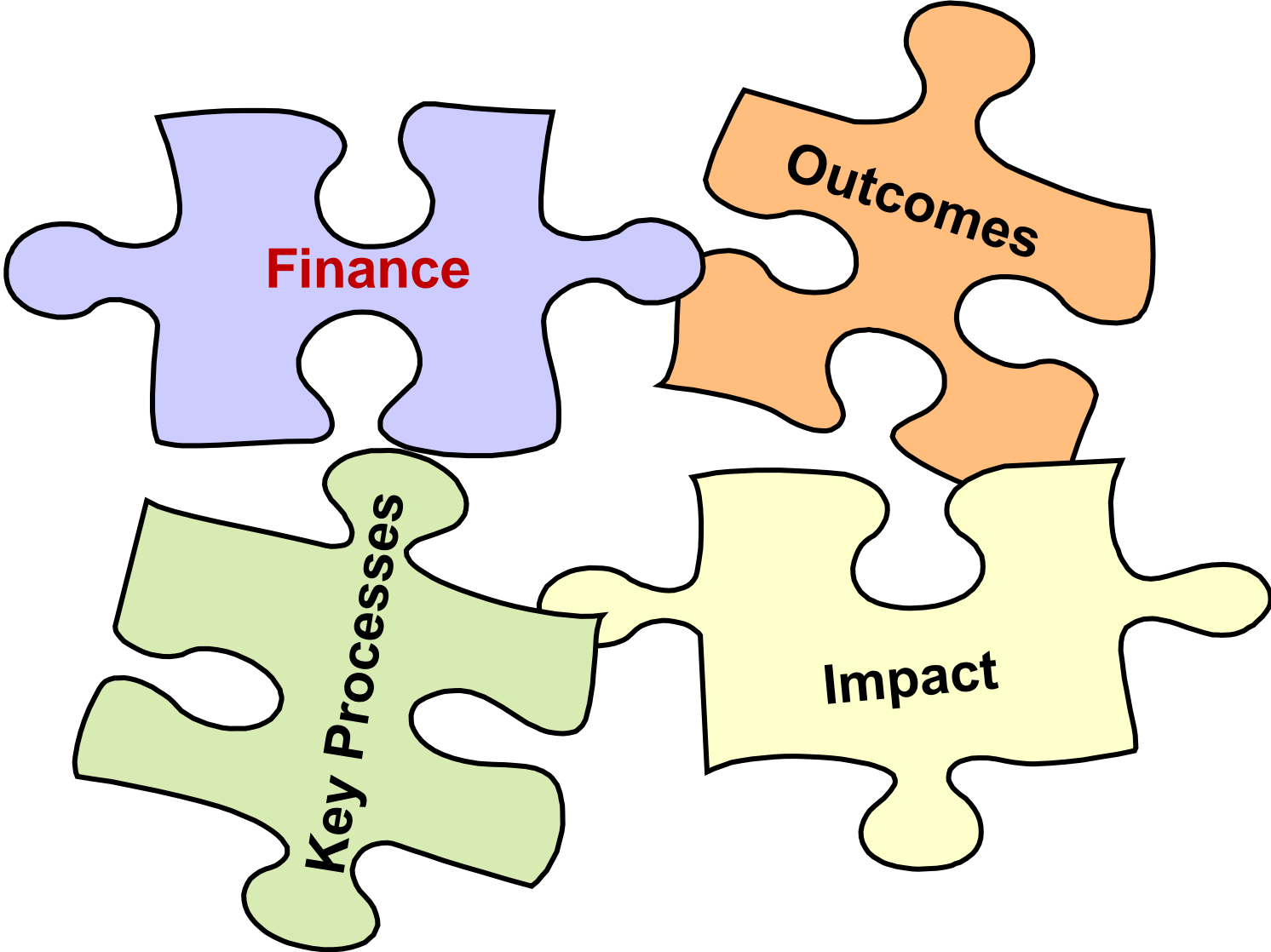
See Appendix for additional

Exercise 6

- In comparing your institution to the median of the 25 most similar institutions, what do you see that might be a cause for concern?

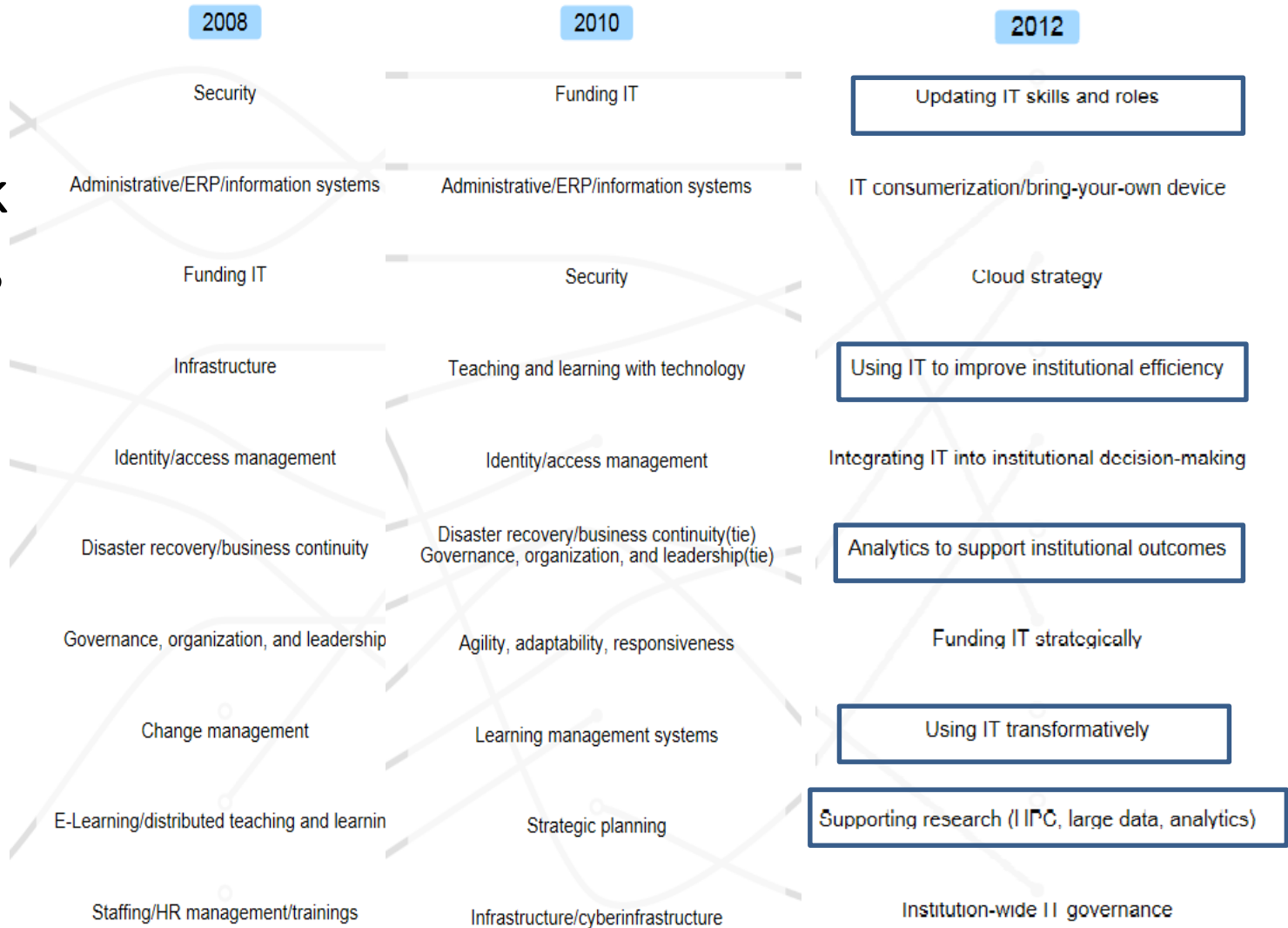
- In comparing your institution to the median of the 25 most similar institutions, what do you see that might be a cause for celebration?

Step 7. Interpret & Use Results



Changes in the Top 10 IT Issues

While the rank changes there seemed to be a steady list until NOW

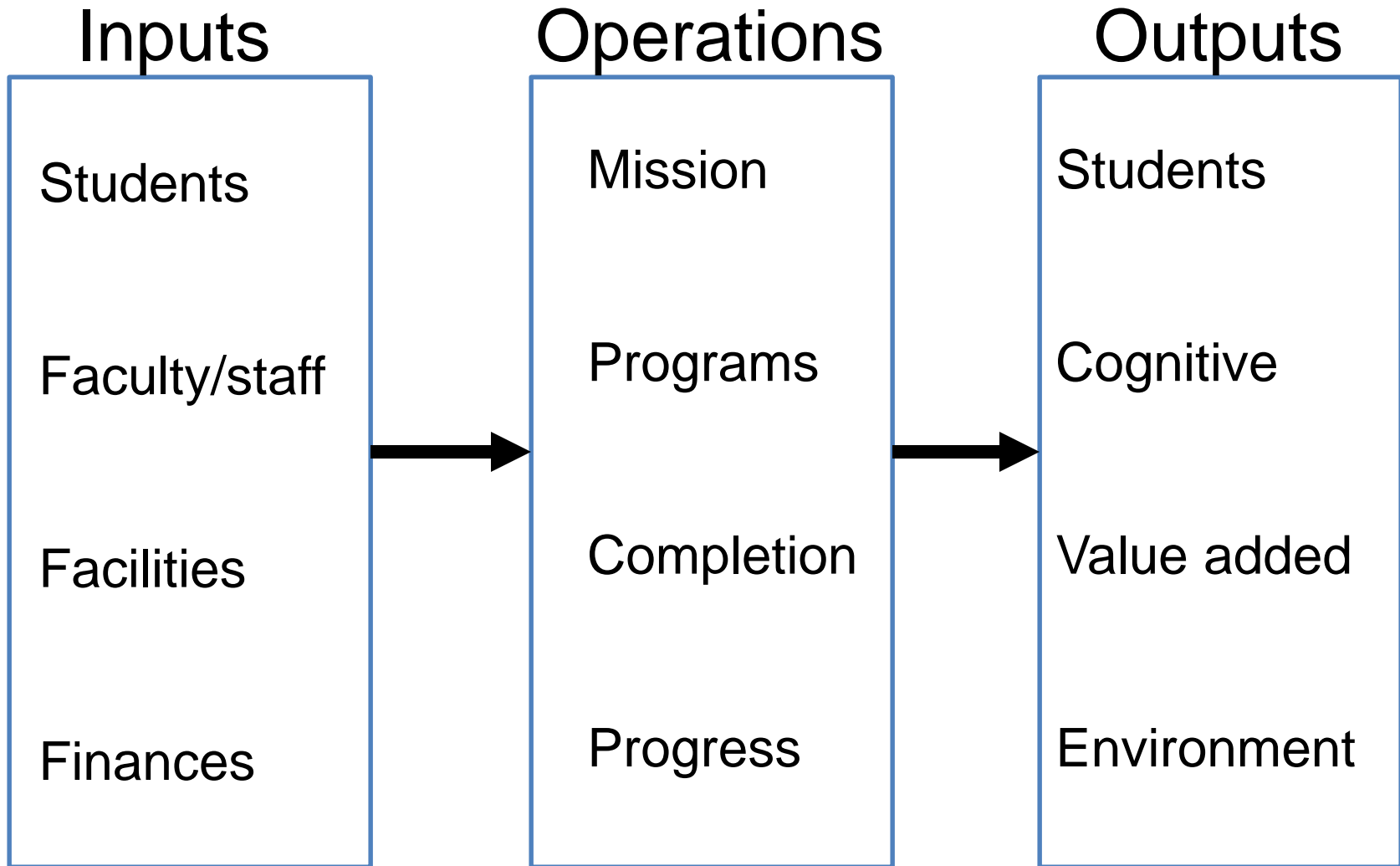


Best Approach for Understanding the Context

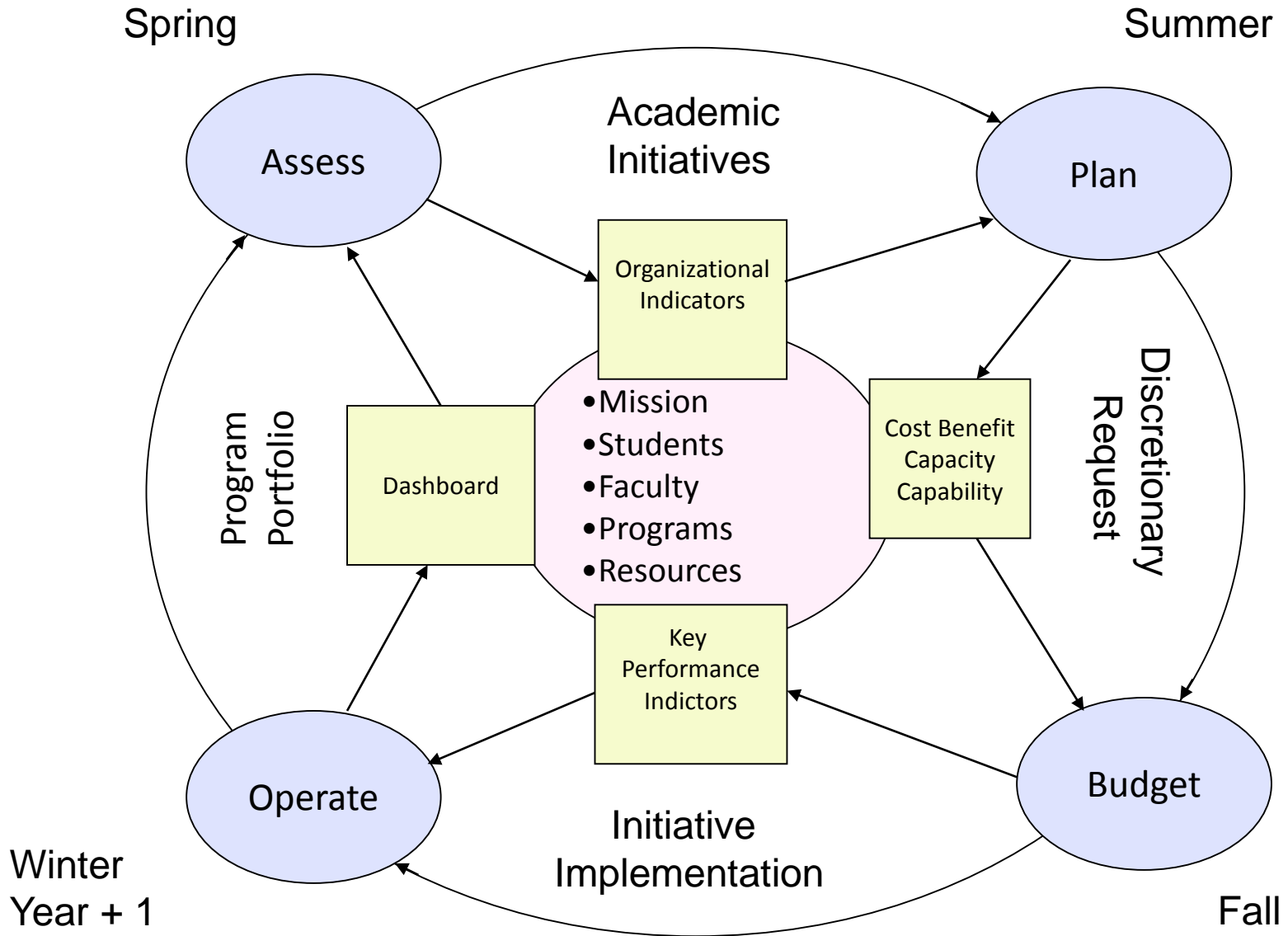
No one
best
approach
but many
resources

- **Models**
 - PEST [Political, Economic, Social, Technical]
 - Systems Models [Input, Process, End Purpose Issues]
- **White Papers and Reports**
 - Federal and State Governments
 - Association White Papers
- **Board of Trustees Resources**
 - Association of Governing Boards Analyses
- **Books on Private Higher Education**
 - Townsley, KPMG [Financing and small colleges]
 - Websites [Price, Equity, Quality, Accountability]
 - Public Agenda.org , Education Trust, etc.

Look at the System: College Flow



Be Strategic: Know the Institution



Part 3

USING THE CSRDE TOOL

Using the CSRDE Tool

Read and agree to the terms

CSRDE Terms and Conditions

Before using this system, please read the [CSRDE Terms and Conditions](#)

Do you agree to the CSRDE terms and conditions?

*Note - The forms below will not work unless you agree to the terms

Read the Instructions

(One per Institution)

Peer Report Tool

Each contact person from your institution has access to this system. Since your institution is entitled to one complimentary peer report, please be sure to coordinate with them before creating your report.

This tool allows you to create your institution's peer report.

Your complimentary peer report is made up of 4 pieces: Peer Detailed Report, Peer Summary Report, Peer Characteristics, and Peer Documentation. **You will need to click each of the four buttons below in order to create all of the pieces of your complimentary report.**

Follow the steps below for creating the report.

1. Narrow down the institutions in the left box using the four category drop-down menus or you can click in the left box and start typing the name of the institution. **Only one category drop-down menu will work at a time.**
2. Select your institutions below by choosing the name in the left box and then clicking the arrow to move the selection to the right box. If you would like to take a school out of your selection list, choose the school to remove in the right box and click the left arrow to move the school to the left box. You also can press the 'Reset' button at any time to clear your peer selection list.
3. There are two options for creating your peer reports

Option 1: Pick your institution as one of the 5 to 20 institutions. This will include your institution in with the aggregates.

Option 2: Do not pick your institution as one of the 5 to 20 peers. Click the "Get your Institution's Data" button below and get a separate report for your institution's data only.

4. Review your selection group carefully and make any changes needed. **Once you submit your request, you cannot return and make changes.**
5. When you are satisfied with your selections, press the 'Get Peer Detailed Report' button to submit your request for the Detailed Peer Report. **Do not close the browser yet.** Also, make sure to **save your excel file to your hard drive** before closing it.
6. Select the 'Get Peer Summary Report' button to submit your request for the Peer Report Summary. If you leave this page before requesting the Peer Summary Report, it will not be available when you return.
7. **Optional:** To complete your peer report, you can also get characteristics data and documentation for both your peer group and your own institution. Click the "Get Peer Institutions' Characteristics" button below to get a characteristics report and click the "Get Peer Institutions' Documentation" button below to get a documentation report for your selected peer group. The "Get Your Institution's Characteristics" button and the "Get Your Institution's Documentation" button allow you to retrieve only your institution's corresponding report. **Note:** You can only get one characteristics report and one documentation report for your peer group.
8. If you would like to obtain additional peer reports, please contact CSRDE at 405-325-2158 or email us at csrde@ou.edu and let us know how many additional peer reports you would like. We will increase your available online peer reports and send you an invoice for the additional peer reports.

<http://csrde.ou.edu/portal/index.cfm>

Select Institutions

Select the state you would like to filter the Institution list by:

All States -OR-

Select the Carnegie 2000 Classification to filter by:

All Carnegie 2000 Classifications -OR-

Select the Carnegie 2010 Classification to filter by:

All Carnegie 2010 Classifications -OR-

Select the Selectivity to filter by:

All Selectivity Groups

Pick between 5 and 20 institutions:
Option 1) Pick your institution as one of the 5 to 20 schools that data is included in the aggregates of the peer report.
Option 2) Do not include your institution in the 5 to 20. Get your individual data by clicking "Get Your Institution's Data".

- Arcadia U (PA)
- Armstrong Atlantic State U (GA)
- Assumption College (MA)
- Augusta State U (GA)
- Aurora U (IL)
- Ball State U (IN)
- Barry U (FL)
- Baylor U (TX)

* Institutions with partial data or non-standard definitions
See documentation before making comparisons

Your Peer Selections 6 :

- Appalachian State U (NC)
- Arizona State U (AZ)
- Arkansas State U (AR)
- Auburn U (AL)
- Avila U (MO)
- Bacone College (OK)



REMEMBER: Your institution is allowed one complimentary Peer Report, which is made up of the 4 pieces below (Detailed, Summary, Characteristics, and Documentation).

Make sure your selections are correct before creating any of the pieces of your report below.

Also, make sure to save all files to your hard drive.

Get Peer Detailed Report

<http://csrde.ou.edu/portal/index.cfm>

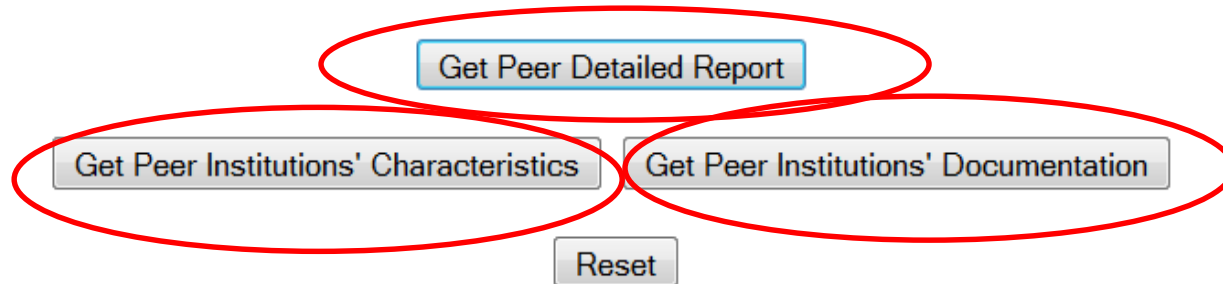
Get All The Reports

- Before you leave the page – get and save the reports – they come down in Excel

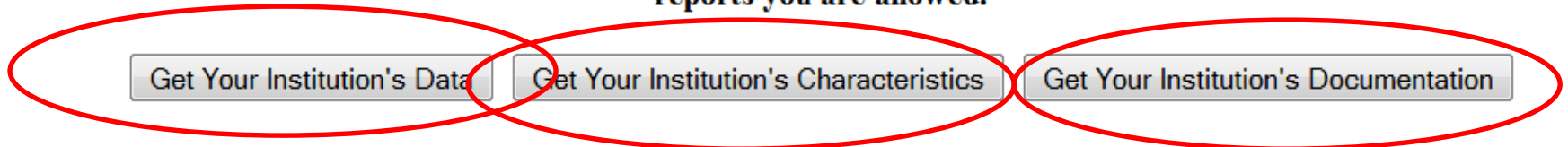
REMEMBER: Your institution is allowed one complimentary Peer Report, which is made up of the 4 pieces below (Detailed, Summary, Characteristics, and Documentation).

Make sure your selections are correct before creating any of the pieces of your report below.

Also, make sure to save all files to your hard drive.



Retrieve your own institution's data by clicking each button below. This will not count towards the number of peer reports you are allowed.



Standard Reports (STEM)

Summary STEM Report Tool - Select by Categories

Select a summary report by using one of the 10 forms below that are grouped by category. Click on the category header to bring up the form. **You may create as many of these reports as you like.**

First-Time Full-Time Freshman Cohorts of Fall 2000-Fall 2009 By Control, Selectivity, and Carnegie 2000

Institutional Control
(choose one):

- Public
- Private

Institutional Selectivity
(choose one or more):

- Highly Selective
- Selective
- Moderately Selective
- Less Selective

Carnegie Classification 2000
(choose one or more):

- Doctoral Research Extensive
- Doctoral Research Intensive
- Masters I
- Masters II
- Baccalaureate-General

Submit

Reset

First-Time Full-Time Freshman Cohorts of Fall 2000-Fall 2009 By Control and Selectivity

First-Time Full-Time Freshman Cohorts of Fall 2000-Fall 2009 By Control and Carnegie 2000

First-Time Full-Time Freshman Cohorts of Fall 2000-Fall 2009 By Control and Institutional Size

First-Time Full-Time Freshman Cohorts of Fall 2000-Fall 2009 By Control and % of Part-time Undergraduates

First-Time Full-Time Freshman Cohorts of Fall 2000-Fall 2009 By Control, Degree of Urbanization, and Carnegie 2000

First-Time Full-Time Freshman Cohorts of Fall 2000-Fall 2009 By Control and Carnegie 2010

First-Time Full-Time Freshman Cohorts of Fall 2000-Fall 2009 By Control, Selectivity, and Carnegie 2010

First-Time Full-Time Freshman Cohorts of Fall 2000-Fall 2009 By Control, Size, and Carnegie 2010

First-Time Full-Time Freshman Cohorts of Fall 2000-Fall 2009 By Control, Degree of Urbanization, and Carnegie 2010

<http://csrde.ou.edu/portal/index.cfm>

Ad hoc Summary STEM Report

Adhoc Summary STEM Report Tool - Self-Selected Peers

This tool allows you to create a summary report with the peers that you select below. Follow the steps below for creating the report. **You may create as many of these reports as you like.**

1. Narrow down the institutions in the left box using the four category drop-down menus or you can click in the left box and start typing the name of the institution. **Only one category drop-down menu will work at a time.**
2. Select your institutions below by choosing the name in the left box and then clicking the arrow to move the selection to the right box. If you would like to take a school out of your selection list, choose the school to remove in the right box and click the left arrow to move the school to the left box. You also can press the 'Reset' button at any time to clear your peer selection list.
3. Make any changes needed to your peer selections.
4. When you are satisfied with your selections, press the 'Get Peer Summary Report' button to create your report.
5. **Optional:** You can now get characteristics data and documentation for your peer group. Click the "Get Peer Institutions' Characteristics" button below to get the characteristics report and click the "Get Peer Institutions' Documentation" button below to get the documentation report.

Select the state you would like to filter the Institution list by:

All States -OR-

Select the Carnegie 2000 Classification to filter by:

All Carnegie 2000 Classifications -OR-

Select the Carnegie 2010 Classification to filter by:

All Carnegie 2010 Classifications -OR-

Select the Selectivity to filter by:

All Selectivity Groups

Pick between 5 and 20 institutions :

Albany State U (GA)
Alverno College (WI)
Arkansas State U (AR)
Armstrong Atlantic State U (GA)
Augusta State U (GA)
Azusa Pacific U (CA)
Baylor U (TX)
Bloomsburg U of Pennsylvania (PA)

* Institutions with partial data or non-standard definitions
See documentation before making comparisons

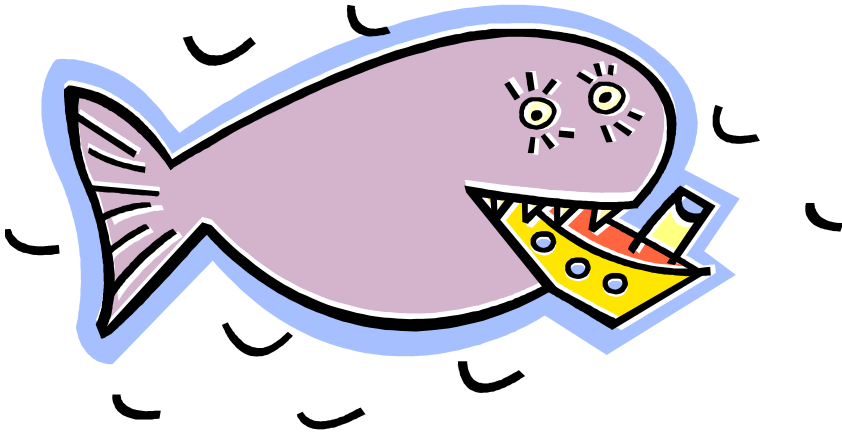
Peer Selections :



Discussion

- What did you learn?
- What does it mean?
- So what?

Part 5



Summary

BENCHMARKING RETENTION DATA STRATEGICALLY

Major Institutional Challenges

REVENUES

- Significant decline in endowments and endowment draws.
- Wealthy donors stressed financially - cutting gifts.
- Parents hit hard by loss of savings or investments.
- Financial aid takes more of each new dollar.
- Sicker price continues to grow faster than inflation. Twenty years took 57% of disposable income; now takes 82% of disposable income.
- Net price - from 59% of disposable income to 72%.

Major Institutional Challenges

DEBT

- Lack of access to the public debt market.
- Reliance on local financial agencies as the main source of debt financing.
- Tendency to be tuition dependent, thus reliant on enrollment growth to finance debt.
[Enrollment declines can push them over the brink!]
- Risky use of gifts or endowments to finance debt.

Major Institutional Challenges

COMPETITION

- Lack of the discounting power to snag high-end students.
- Market share going to new for-profit colleges and convenience colleges.
- Colleges may lose their cash cow (e.g., continuing education, business) to for-profits and convenience colleges (on-line, MOOC's).

Data as “Strategic”

Data become strategic when they are used to support decision making and actions that support future success and well-being of the institution.

Data must be combined, analyzed, or restructured to create information.

Data and information must then be combined with knowledge of the user to create the type of intelligence required *for good decision making*.

What Does This Really Mean?

Benchmarking and comparative data provide the opportunity to use data to be strategic.

Retention data needs to provide the basis for creating information that can be used to better understand the context and for planning.

Judgment is required to make the retention data and information effective in strategic processes.



Common Mistakes Made when Trying to Be Strategic

Data Overload

Failure to Use Data in Appropriate Manner

Inappropriate Level of Detail

Lack of Governance Perspective

Lack of Strategic Relevance

Insufficient Information Distribution

Inattention-to-Time Constraints

Reliance on Anecdote

Lack of Context



How Benchmarking and Comparative Retention Data Help Improve Planning

Identify, calculate, monitor and utilize **RETENTION DATA** and performance indicators to help the institution:

- Achieve mission effectiveness,
- Maintain financial vitality,
- Develop a competitive advantage; and,
- Neutralize key vulnerabilities.

PANIC!

delete



GO!

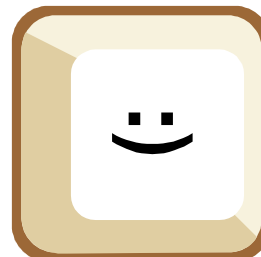
Coffee

Thank you

Richard Howard rdhoward@umn.edu

Josetta McLaughlin jmclaugh@roosevelt.edu

Gerry McLaughlin gmclaugh@depaul.edu



APPENDIX

CSRDE Video

CSRDE Quick Query instruction video. About 13 minutes.

<http://csrde.ou.edu/web/qqsinfo.html>

1

Quick Query System Information

The Quick Query System is the new online application developed by the CSRDI of institutional membership determines which tools are accessible. The tools are described below.

1. Peer Report Tool (available to all participating members).

This tool is available to institutions that provide data for our reports. With this tool, you are able to create reports that were created in previous years, but now instead of faxing in a form and waiting 2 to 3 weeks for us to process them, you can get them online.

The Peer Report Tool can also help you in selecting institutions with similar characteristics: such as location, size, etc. You can filter down to schools matched on that option. Each filter works separately on the list of institutions toward the school you are looking for since the list is in alphabetical order.

Important note: Remember that each institution is only allowed one complimentary peer report per year. There is a "Get Peer Details" button.

[Click here for a video of how to use the Quick Query System](#)

2. Summary Report Tool - Select by Category (available to Level 2 and 3 members).

Click here

Click here

2

Quick Query System Login

Username:

Password:

Submit

*you must register to receive the login information. [Click here to register.](#)

CSRDE Video (cont.)

The Consortium for Student Retention Data Exchange at the University of Oklahoma is a consortium of two-year and four-year

3

Fill out the form below and you will be given the

Name:

Name:

Address:

Address:

Submit

Fill in and hit Submit



- 4 Enter the Username and Password you receive after filling in the data about yourself and submitting. Video is 12:53 run time.

These are instructions on how to use the CSRDE website.

<http://csrde.ou.edu/web/qqsinfo.html>

Auditing the Situation

External: Anticipate Key Future Events

Political

- Financial Aid
- Future Support of K-12
- Higher Education Reauthorization Act

Economic

- Interest Rates
- Economy for industries

Social

- Demographics
- Career Demand

Technical

- Distance Learning
- Knowledge Management

Legal

- New Laws
- Technology and the law interact

Step 2

Standards for Data and Information

Standard	Question
Accurate	Are the data free from error and do they conform to the truth?
Complete	Are observations available for the necessary points (i.e., not missing)?
Documented	Is there an explanation of where the data came from and the recoding?
Defined	Is there an understandable description of the data elements?

Standards for Data and Information (Cont.)

Standard	Question
Reasonable	Do the data have an allowable value for the situation that is reasonable?
Reliable	Are the data stable, consistent, and produce the same conclusion by various users?
Valid	Do the data do what they are intended to do? Are they properly interpreted, generalized and explain the constructs?
Sufficient	Do the data contain all variables needed for the stated purpose?

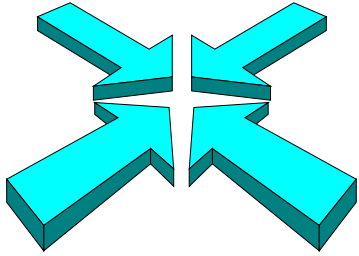
Standards for Data and Information (Cont.)

Standard	Question
Relevant	Do the data include only important measures?
Timely	Are the data current for the purpose?
Accessible	Can the data be accessed easily and efficiently with sufficient documentation to determine data usability?
Authoritative	Are the data from a source that is recognized as “expert” in the field?

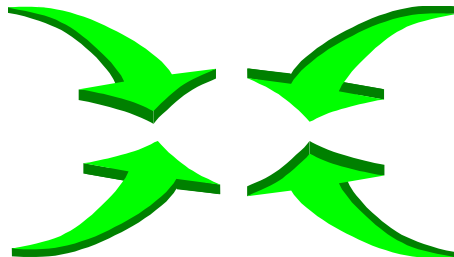
Domains and Variables - Examples

Domain

Academic Program



Staffing and Faculty



Variables

Level of Degrees
Presence of professional programs
Importance of STEM Fields
Medical school/ Hospital
Education disciplines
Research funding in discipline

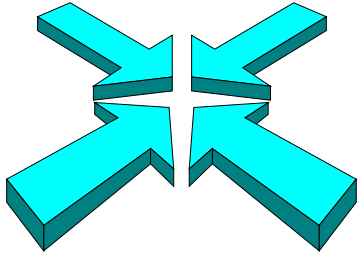
Full time Faculty
Tenure-Tenure Track
Adjuncts as a % of instructional FTE
Race/Ethnicity of personnel
Administrators as % Staff
Average Salary of faculty

Step 2

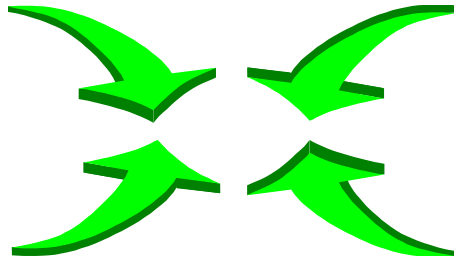
Domains and Variables - Examples

Domain

Demographics



Finance



Variables

Size

Control

Carnegie Category

Urbanicity

Medical school/ Hospital

Education disciplines

Research funding in discipline

%Full time Faculty

%Tenure/Tenure Track

Adjuncts as a % of instructional FTE

Race/Ethnicity of personnel

Administrators as % Staff

Average Salary of faculty

Newer IPEDS Tool



IPEDS ANALYTICS : DELTA COST PROJECT DATABASE



Welcome to the IPEDS Analytics: Delta Cost Project Database. Here you will find a longitudinal database derived from IPEDS finance, enrollment, staffing, completions and student aid data for academic years 1986-87 through 2009-10. These data have been translated into analytical formats to allow for longitudinal analyses of trends in postsecondary education with a focus on revenues and expenditures.





Data Download

You can download the database files using the links below. Each zipped file includes the updated 1987-1999 and 2000-2010 database files along with the data dictionary, data mapping file, and program code to create value labels.

- [IPEDS Analytics: Delta Cost Project Database 1987-2010 \(SAS\)](#) (125 MB)
- [IPEDS Analytics: Delta Cost Project Database 1987-2010 \(SPSS\)](#) (106 MB)
- [IPEDS Analytics: Delta Cost Project Database 1987-2010 \(STATA\)](#) (115 MB)
- [IPEDS Analytics: Delta Cost Project Database 1987-2010 \(CSV\)](#) (105 MB)

Documentation Files

Please refer to the following documentation files to learn more about the variables and improvements to the database:

- [IPEDS Analytics: Delta Cost Project Database 1987-2010 Data File Documentation](#)  (69 KB)
- [Data Dictionary](#)  (730 KB)
- [Data Mapping File](#)  (262 KB)
- [SAS code to create and organize finance variables per FTE student and adjusted for CPI-U](#) (35 KB)
- [Delta Cost Project IPEDS Database History, 1987-2009](#)  (571 KB)

If you have questions or comments about the IPEDS Analytics: Delta Cost Project Database please contact Colleen Lenihan at DeltaData@ed.gov.

Surveys of Similar Students







[Publications & Products](#) |
 [Surveys & Programs](#) |
 [Data & Tools](#) |
 [Fast Facts](#) |
 [School Search](#) |
 [News & Events](#) |
 [About Us](#)


[Back to DataLab](#)

GROUP

WORK SPACE

QuickRetrieve:
GO

POSTSECONDARY

Students

Beginning college students

All undergraduates

Graduating college seniors

Graduate students

Faculty

PRE-ELEMENTARY

Students

Group

Graduating college seniors

Students who...

received their bachelor's degrees in 2007-08 and were followed for 1 year	received their bachelor's degrees in 1992-93 and followed for 10 years.
Includes: <ul style="list-style-type: none"> Outcomes for bachelor's degree recipients Graduate and professional program access Labor market experiences Rates of return on investment in education Experiences with debt and loan repayment K-12 teaching experience 	Issues that can be addressed include: <ul style="list-style-type: none"> Outcomes for bachelor's degree recipients Graduate and professional program access Labor market experiences Rates of return on investment in education
Approximate number of respondents: 15,000.	Approximate number of respondents: 11,200.
Study name: Baccalaureate and Beyond Study: 2008–2009 Visit study website	Study name: Baccalaureate and Beyond: 1993–2003 Visit study website
View example tables	View example tables
SELECT	SELECT

<http://nces.ed.gov/datalab/quickstats/default.aspx>

Compare Libraries

Report ID:

Go



[Academic Libraries Home](#) | [Libraries Home](#) | [Academic Libraries Survey](#)

Compare Academic Libraries allows users to compare one library (the library of interest) with similar libraries (the comparison group). For example, a user may wish to compare one library's total circulation with the total circulation of a group of libraries with similar total expenditures.

The steps involved in using Compare Academic Libraries are:

1. Select the library of interest for which you want to find a comparison group.
2. Choose the basis for identifying similar libraries (the "Comparison Group"): e.g. size of staff.
3. Choose the information you would like displayed in the report.
4. View the report, which compares your library of interest with its comparison group.

[Start Search](#)

Fiscal Year 2010 data from the Academic Libraries Survey (ALS) are used in Compare Public Libraries.

Missing Data:

These data have been reviewed and edited at the state and national levels, and verified as correct by each state's data coordinator. There have been no imputations for non-response, so some data may be missing, indicated as "N/A." This can result in some libraries not being selected for comparison groups. Imputation is a statistical means for providing a valid value for missing data.

Note about confidentiality and removal of data:

Because public use data must protect the confidentiality of respondents, changes have been made in the public use file used by this tool. For libraries where **Librarians and Other Professional Staff** is less than or equal to 2.00 FTE, **expenditures data** for Librarians and Other Professional Staff for those academic libraries have been removed.

Similarly, the **expenditures data** for All Other Paid Staff and Student Assistants have been removed for those libraries where **All Other Paid Staff** and **Student Assistants** respectively are less than or equal to 2.00 FTE. Other Operating Expenditures have been removed to prevent inferring these data. In addition, expenditures data for **Employee Fringe Benefits Paid by Library** have been removed if any salaries data were suppressed.

<http://nces.ed.gov/surveys/libraries/compare/>

Step 3

Cost Tool

File Edit View Favorites Tools Help



TCS Online
DELTA PROJECT

Home | TCS Data | Help | Contact | Login

Selection Menu

- Step 1:**
Choose Report Type
- Institution Comparison (multiple institutions)
 - Institution Snapshot (single institution)
 - US by Carnegie Group

Step 2:
Choose Report

[View/Collapse All](#)

- Revenue: Where Does the Money Come From?
 - Total Revenues By Source
 - One Year**
 - Multiple Years
- Expenditures: Where Does the Money Go?
- Cost/Price/Subsidy: What's the Student Share of Costs?
- Performance: Spending and Outcomes
- Spending Comparisons: Enrollment and Prices vs. Spending
- Enrollment: Where Do Students Go?

Step 3:
Make Filter Choices

Select Year

2009 ▼

Select Inflation Adjustment Index (in 2009 dollars)

- None
- CPI (Consumer Price Index, Urban Consumers)
- HEPI (Higher Education Price Index)
- HECA (Higher Education Cost Adjustment)

Select Institution(s)

Select institution(s) for report. You can filter the list by institution name keyword, starting letter of institution, state, Carnegie sector, and/or institution level.

Institution List Filters

Institution Name Keyword

Starting Letter

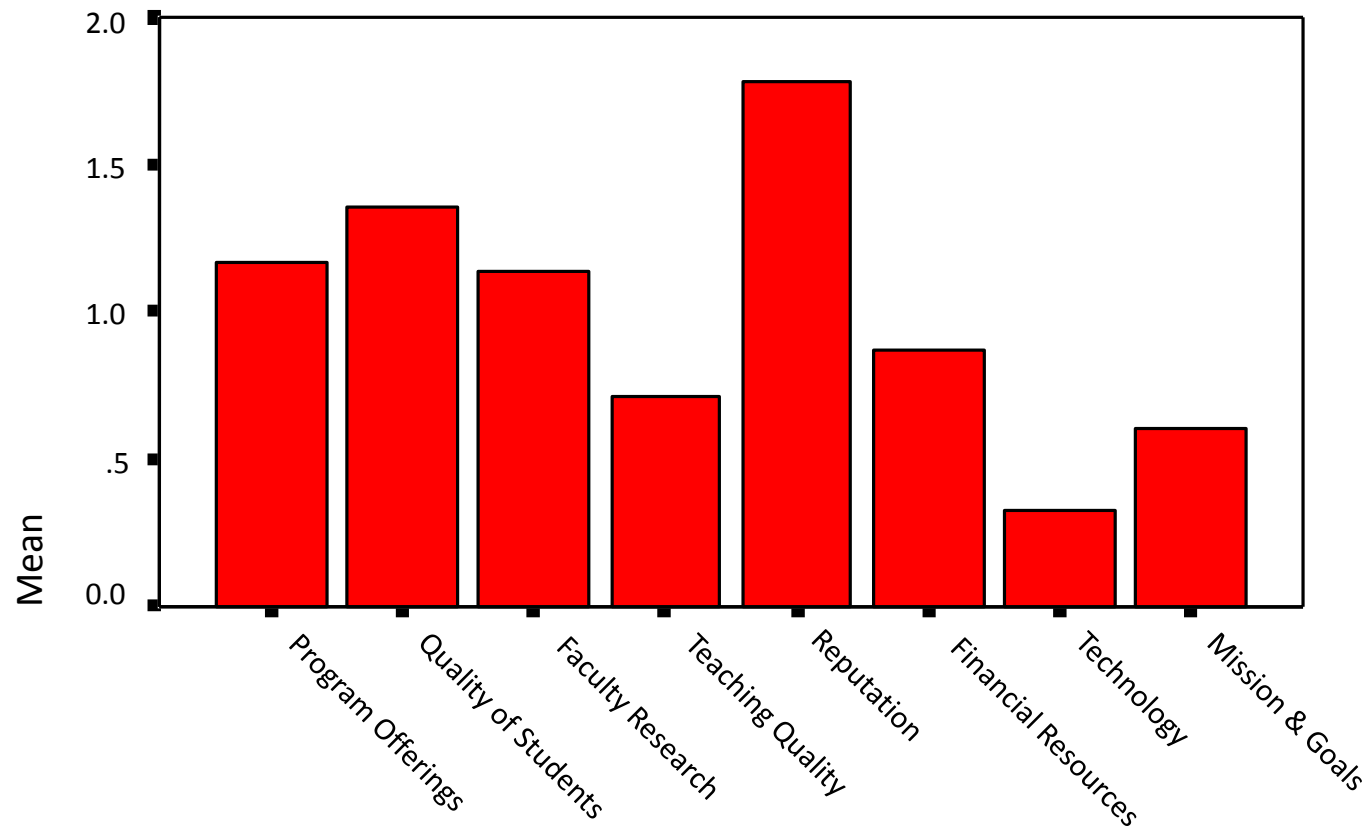
None A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

<http://www.tcs-online.org/Reports/Report.aspx>

Step 4

Aspiration Groups

Relative Importance of Aspiration: Colleges of Business



NCES Basic Categories

Community Colleges

Public (Enrollment size)

- **Community Development & Career Institutions (<2k)**
- **Community Connector Institutions (2k – 10k)**
- **Community Mega-Connector Institutions (>10k)**

Private Not-For-Profit Institutions

- **Allied Health Institutions (100% Allied Health)**
- **Connector Institutions**

Private For-Profit Institutions

- **Career Connector Institutions**
- **Certificate Institutions (100% Certificate)**

Step 4

NCES Categories

4 - Year Colleges

Basic

- **Doctoral (3 based on Research)**
- **Masters (3 based on size of program)**
- **Bachelors (3 based on curriculum)**

Undergraduate Program

Graduate Profile

Undergraduate Profile

Size and Selectivity

Enrollment Profile

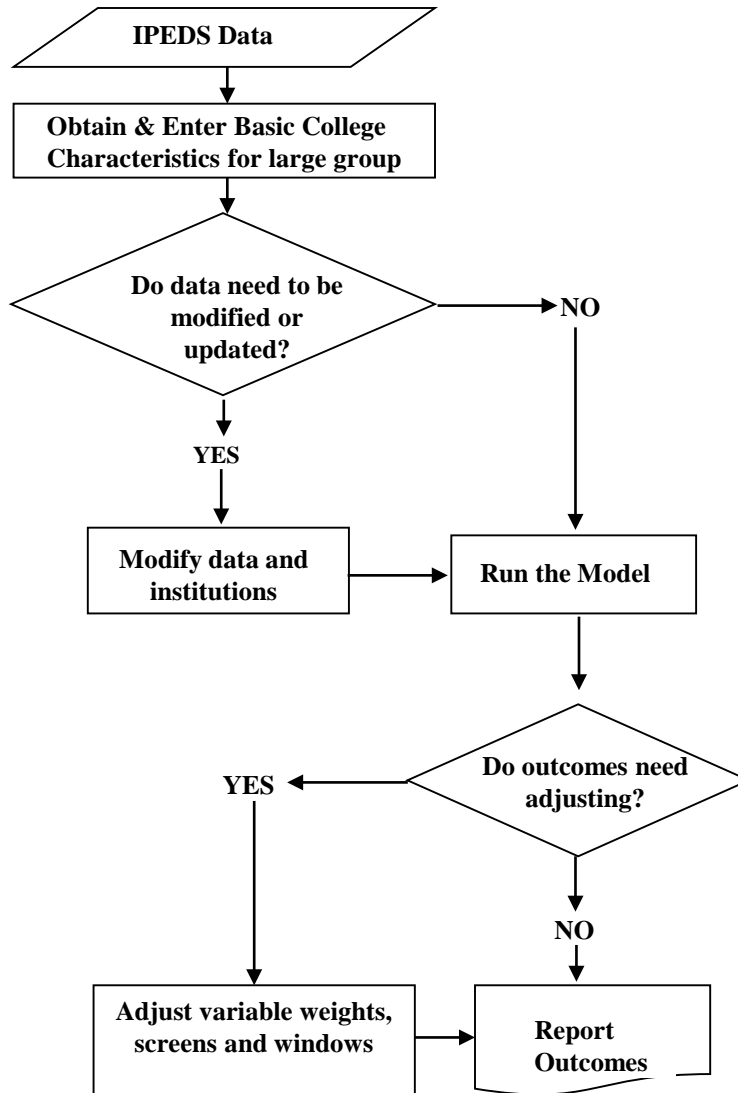
Using Reference Group Model



Purpose:

- Develop from the IPEDS data.
- Consider major components of college.
- Include students, faculty, revenues, academic programs, and expenditures.
- Allow varying importance of factors.
- Produce a list of most similar colleges.

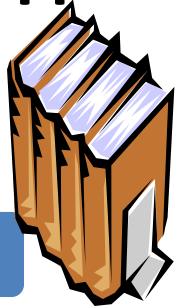
Step 4



Reference Group Model



IBHE Performance Report Common Institutional Indicators



% graduates employed or in graduate school one year after graduation

Students completing requirements

Students receiving aid by type of aid

Average amount of aid by type of student

Completions by race/ethnicity, gender, and disability

Surveys on alumni satisfaction with faculty accessibility and institution quality

Pass rates for lawyers

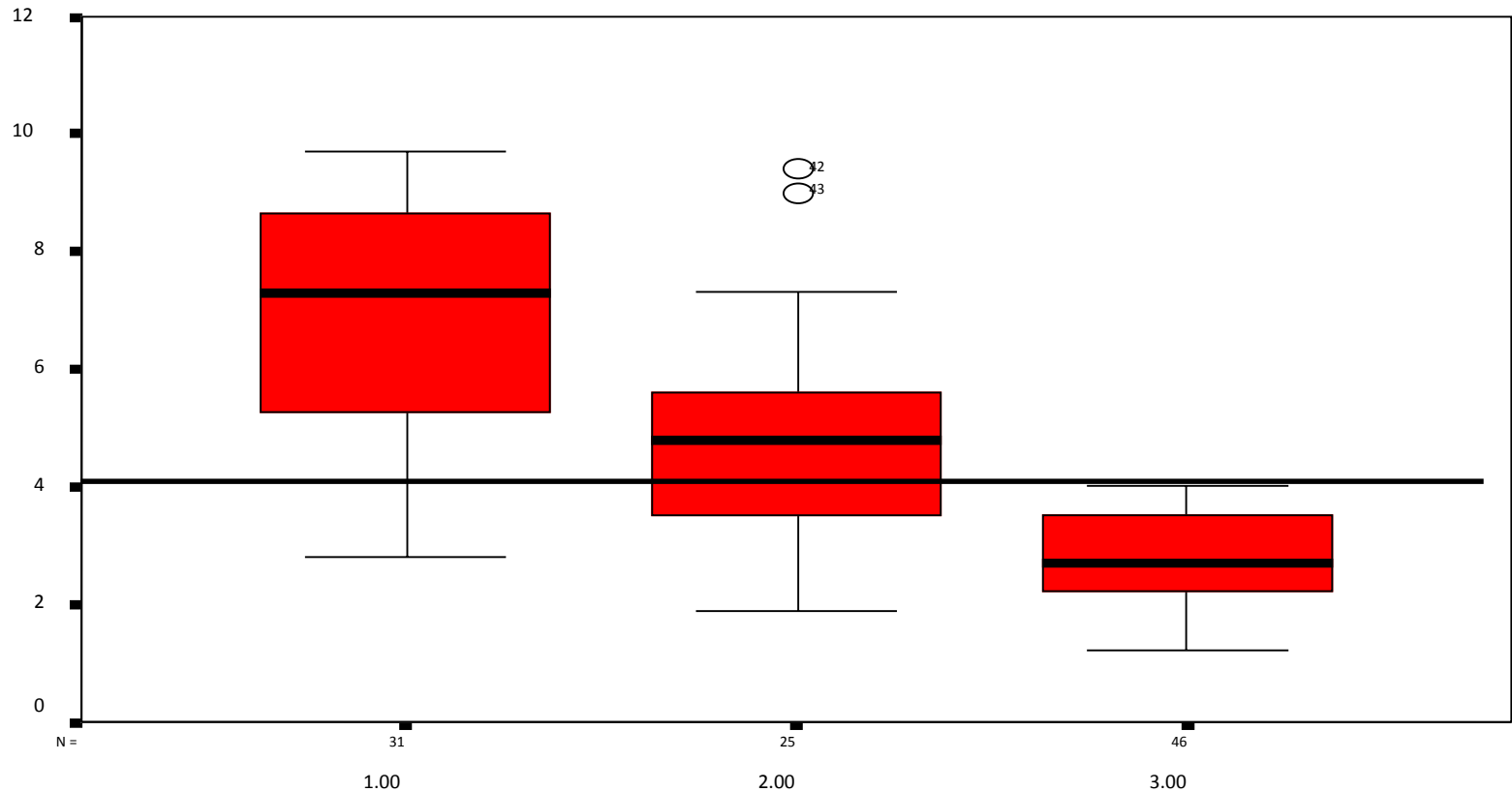
Graduation rates

Results of program review and assessment of learning

Step 6

Example: U.S. News & World Report

If there is one measure and a large number of institutions, a **box-whiskers** can be used for comparisons.

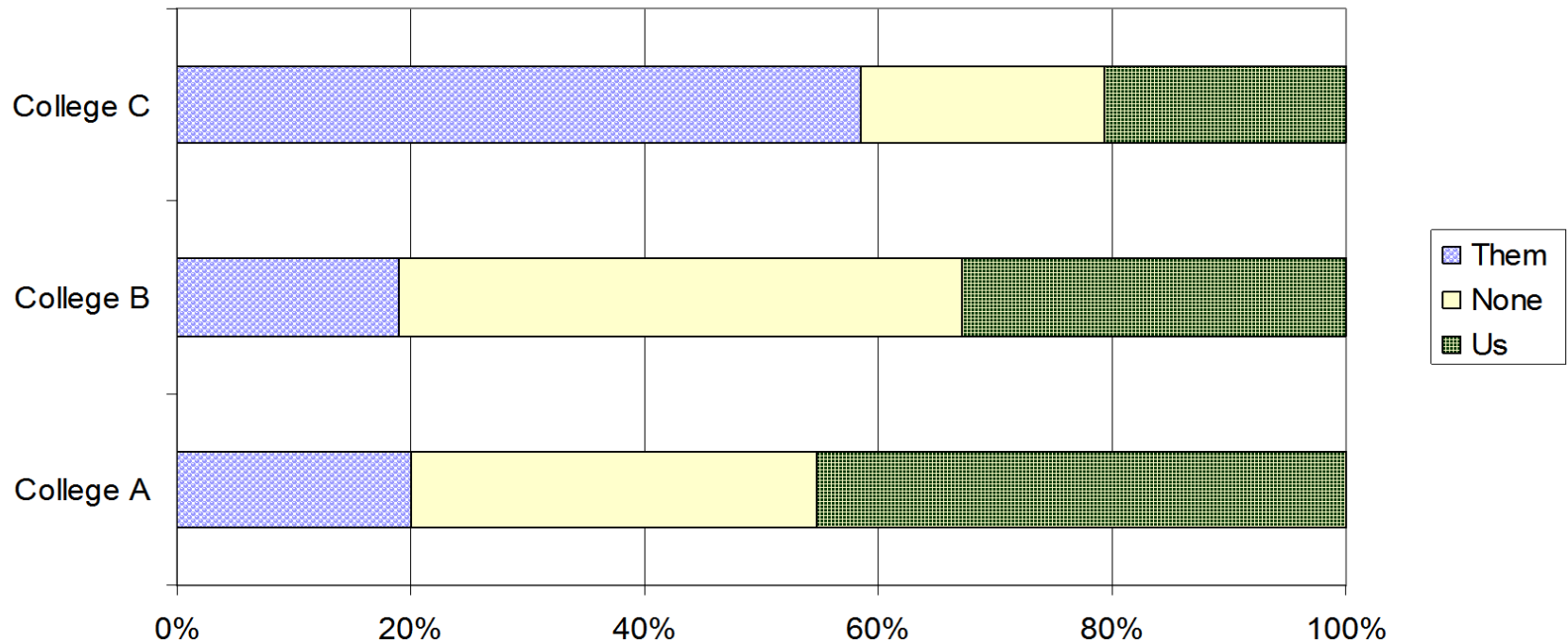


The bolded line is the institution. Boxes are US News Tiers.

Step 6

Example 2: Comparing Institutions that Are Important for Understanding a Multiple Outcome Category

Stacked Bar Chart

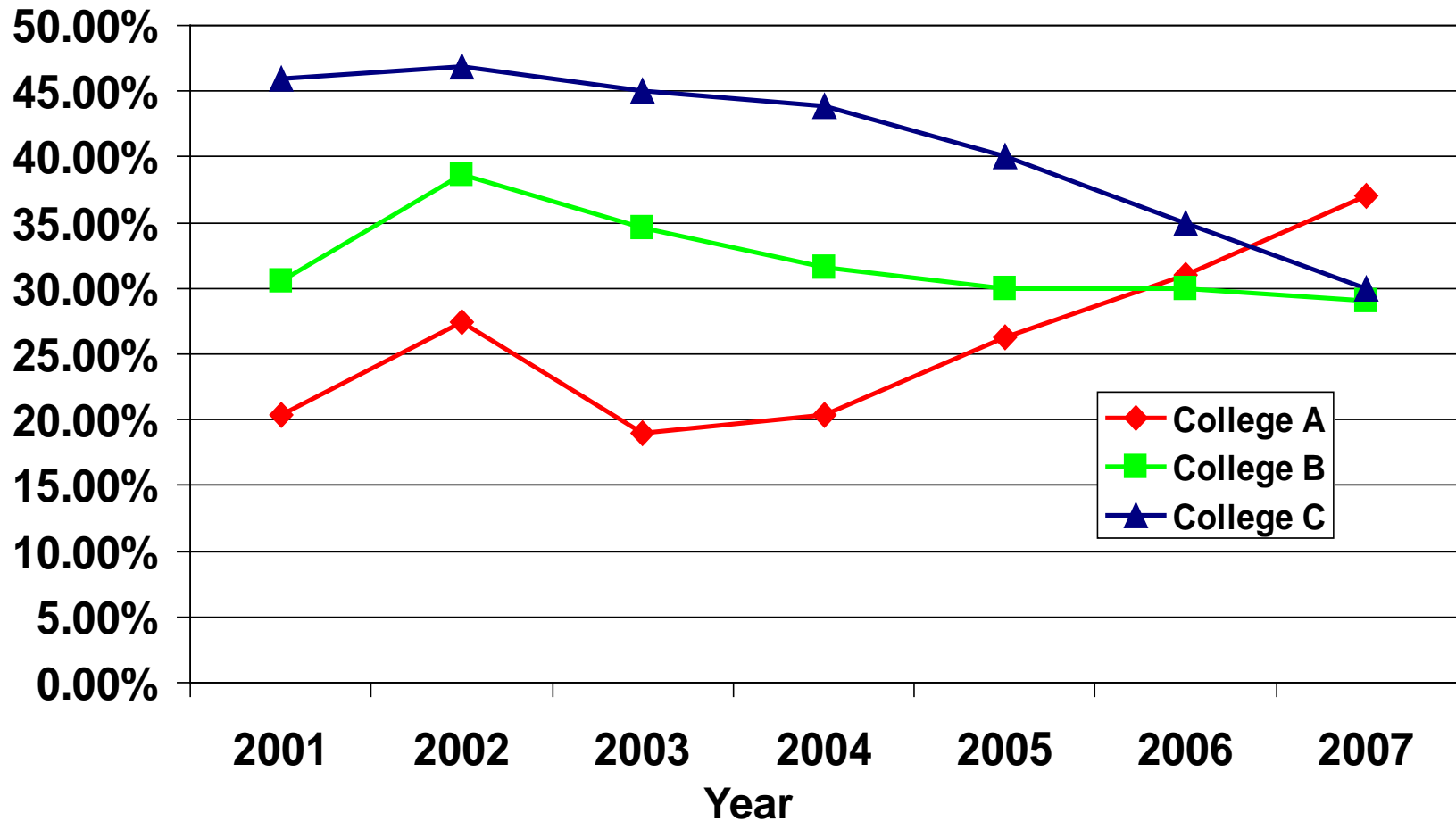


Where Freshmen actually enrolled when they applied to three institutions.

Example 3: Comparing Over Time

Trend Lines

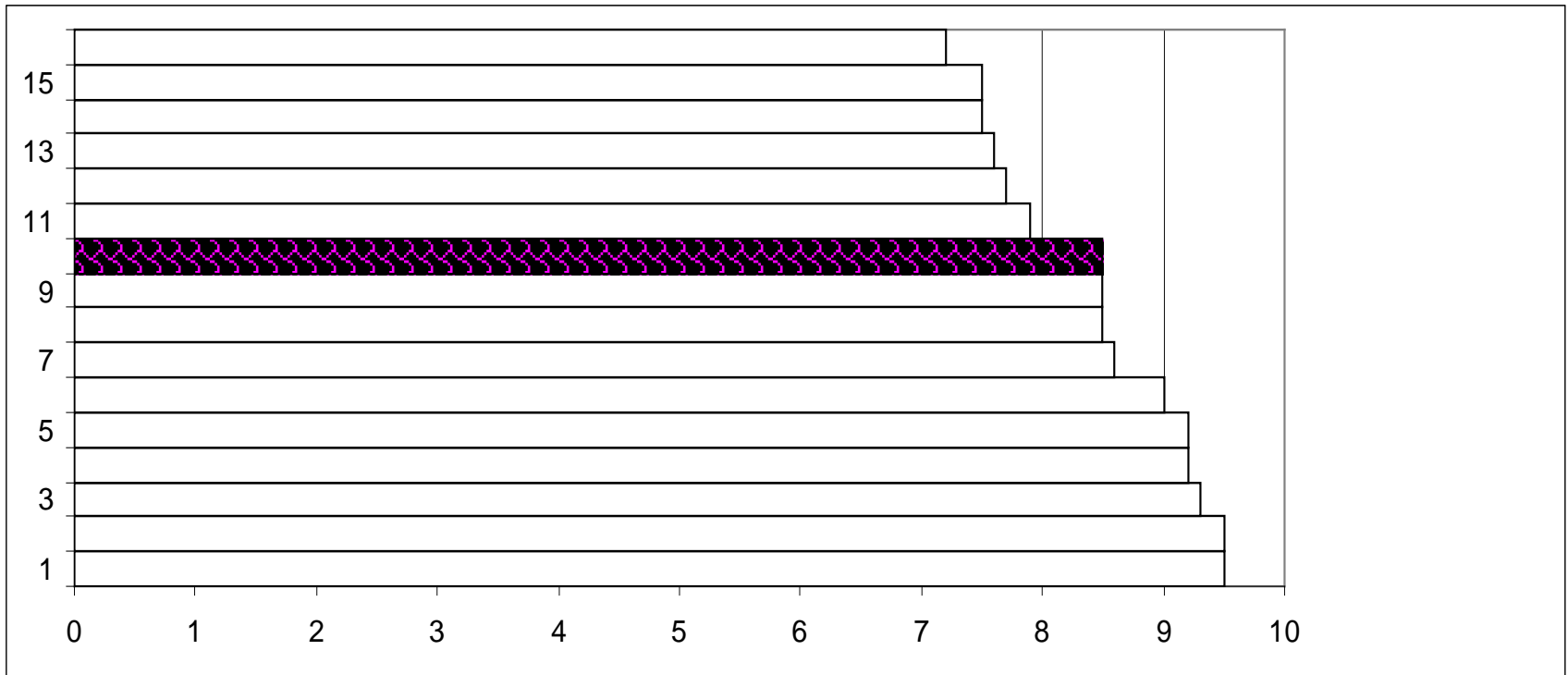
Yield from Acceptances



Step 6

Example 4: Comparing a Limited Number of Institutions

The Bar Chart



The cross-hatched bar is the institution