

Planning and Performance Measurement

Presentation to Provost's Council

20 December 2017

Institutional Research

What are metrics? KPIs?

- **Key Performance indicators** are strategic measures that demonstrate how effectively an organization or business unit is achieving its key objectives. Organizations use performance indicators to evaluate their success at reaching targets.
- **Metrics** are tactical measures that are used to track and assess the status of a specific process. Every organization uses many (thousands) of metrics in its day to day business.

Common institutional indicators in PSE

Demand

- market share/diversification
- applicants to seat ratio
- Enrolment vs plan or budget
- Conversion rates
- Admissions quality (e.g. test scores, high school average)

Experience

- usage and satisfaction of services
- satisfaction with resources, space
- satisfaction with programs and learning
- satisfaction with teaching
- student engagement (e.g. NSSE)
- Student wellness

Student Success

- retention
- GPA
- credit accumulation
- graduation rates
- time to completion

Efficiency

- cost per student
- contribution margin
- average class size
- seat utilization rate
- average TCH per FT faculty

Student Outcomes

- further education
- Employment or related-employment rates
- income
- graduate satisfaction
- student learning
- licensure

Faculty

- faculty qualifications
- Research productivity measures (publications, grants)
- faculty development activities
- faculty engagement

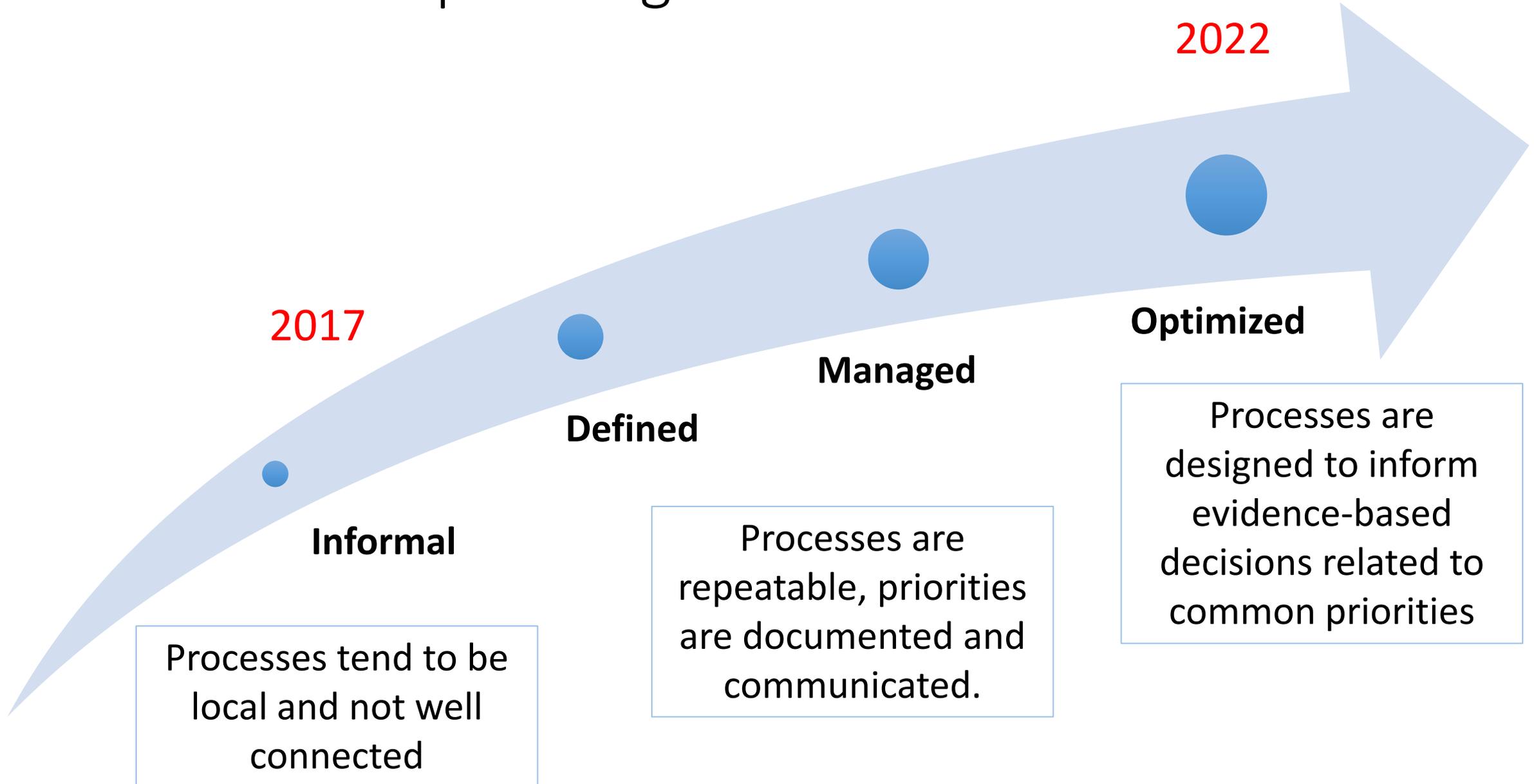
Access

- enrolment/success of targeted populations
- enrolment/success of pathway students

External

- program accreditation
- industry and community partnerships
- PAC indicators
- employer satisfaction
- donations
- research \$

The evolution of planning at Sheridan



The planning cycle

Outcomes/Impacts

- Is the project reaching the intended number of participants?
- Is the project providing the planned services?
- Did the participants experience the expected changes in their skills, knowledge, attitudes, or behaviours?
- Is the project leading to the expected long-term outcomes/impacts?

Evaluate Outcomes

Assess the Landscape

- What's going on in the internal and external environments?
- What are the pressing problems and significant opportunities that we must strategically address?

Needs

Create the Plan

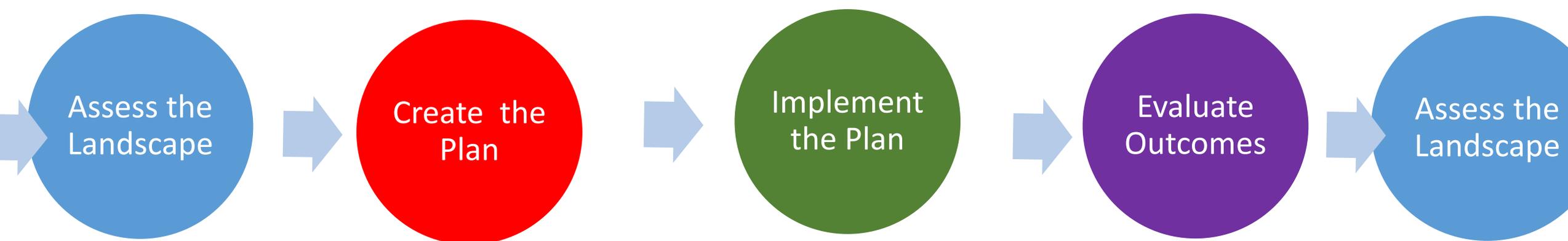
- What initiatives are required to address these problems/opportunities?
- What are the planned outcomes?
- What are the activities that are required to meet those outcomes?
- Who will take action?
- Who will be affected by the actions?

Outputs

- Are the activities being performed as planned?
- Is the project reaching the intended target population?

Implement the Plan

Inputs
Activities



Needs

Inputs

Activities

Outputs

Outcomes

Impact

What needs is the initiative intended to address?

Low and falling average graduation rate in the Faculty because of very high term 1 attrition in certain programs.

What resources are required?

- Professional development funding
- SWF hours
- advisor hours
- leadership team time

What goes into the program?

Create/implement an early alert program:

Q1: Develop task force with leadership, student affairs, and faculty

Q2: Create program

Q3: Training

Q4: Launch Program

Q5: Continue Program

Q6: Evaluate Results

What happens as a result of the initiative?

- #/% professors trained
- #/% professors participating
- #/% students referred
- #/% referred students participating
- Professor/student/advisor satisfaction with early alert program experience

What are the short/medium term benefits?

- Retention rates
- Average credit accumulation
- Average GPA
- Student satisfaction
- Faculty satisfaction

What are the longer term benefits?

- Graduation rate
- # Graduates entering workforce
- Employment
- Wages
- Program reputation
- Program demand
- Revenue
- Donations

What data sources are readily available?

- PeopleSoft data:
 - Admissions data
 - Enrolment
 - Grades, retention
- OCAS data:
 - Market share
- KPI surveys:
 - Student Satisfaction with learning, programs, services, facilities
 - Graduate Outcomes – satisfaction, employment
- Course Evaluation Surveys
- NSSE Surveys (degree students – Faculty level only)
- SRCA data
- Program Costing data

S.M.A.R.T. Criteria

- Be **specific** in what you are attempting to achieve.
- Wherever possible, targets should be **measurable**. Keep in mind that outcomes/impacts can be harder to measure because of timing or difficulty isolating causality.
- Targets should be **achievable**, given available resources. Targets can be based on past performance, external comparators, or required standards.
- Actions should be **relevant** to achieving mission. It is not uncommon for organizations to discover misalignment between planned actions and desired organizational outcomes/impact when they begin to formalize integrated planning processes. Metrics that can be cascaded can help: Institutional – divisional – faculty – school –program
- Goals should be **time-bound** (specify when the result(s) can be achieved).

Other Considerations

Balance your indicators between:

- Inputs vs outputs vs outcomes vs impact
- Quality vs efficiency vs process vs people
- Leading indicators (the future) vs lag indicators (the past)
- But, resist creating too many

Review your metrics to inform your strategy:

- Strategy is based on an 'if-then' theory.
- If actions are not leading to the expected results, may need to reevaluate your hypothesis.

Table exercise

1. In groups with your faculty/department's leadership team.
2. Pick one of your initiatives in your draft plan.
3. Complete the table for that initiative.

What needs is the initiative intended to address?	What resources are required?	What goes into the program?	What happens as a result of the initiative?	What are the short/medium term benefits ?	What are the longer term benefits?
Needs 	Inputs 	Activities 	Outputs 	Outcomes 	Impact