UNC

Strategic Metrics: The Secret Ingredient to Transforming Your Institution

March 6, 2022 at 2 PM

If you would like the slides – pnf@unc.edu

Dr. Paul N. Friga

Our Distinguished Panel

Paul Friga
Clinical Associate Professor of Strategy at UNC-CH, AGB Senior Consultant

Jamienne S. Studley
President & CEO of WASC Senior College & University Commission

Cynthia D. Shapira
Board Chair of Pennsylvania State System of Higher Education

Kevin Guskiewicz
Chancellor of The University of North Carolina at Chapel Hill

Roderick McDavis
Managing Principal at AGB Search

Source: Dr. Paul N. Friga

You Get What You Measure – Metrics Should Align with Strategy

Mission Statement

Statement which specifies a firm's purpose or "reason for being" and the primary objective toward which the firm's programs & plans should be aimed. Statement specifying the firm's key constituents and how the firm will serve them. It must be clear and understood.

It "makes you proud."

Vision Statement

Statement describing what the firm strives to be at some future time. It should be specific and motivating.
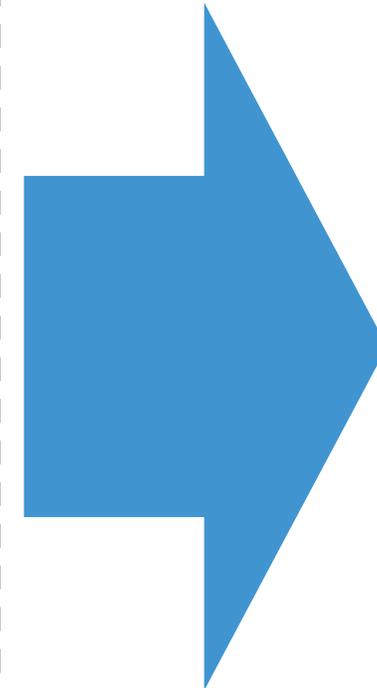
It "makes you excited."

Values

It is what we believe in, our guiding principles, and how we interact.

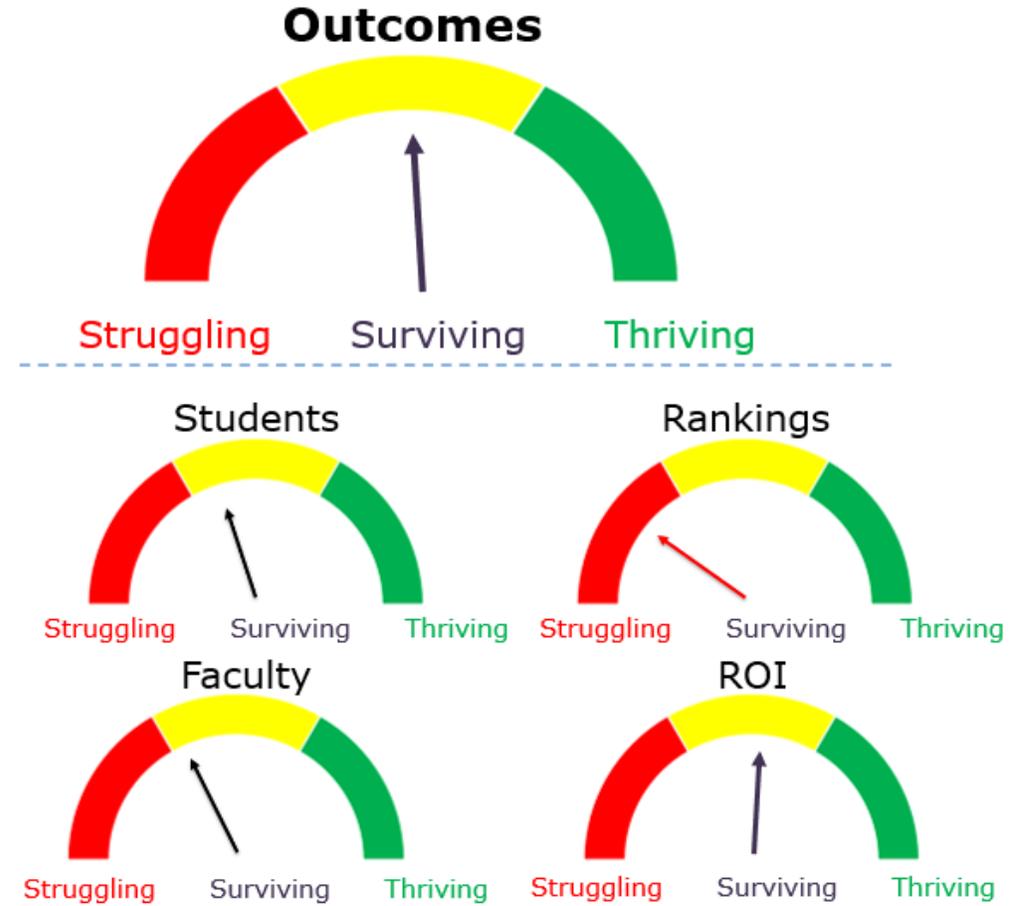*It "makes you belong."*

**The T-Shirt Theory
(Strategy on one page)**

Mission
Vision
Values

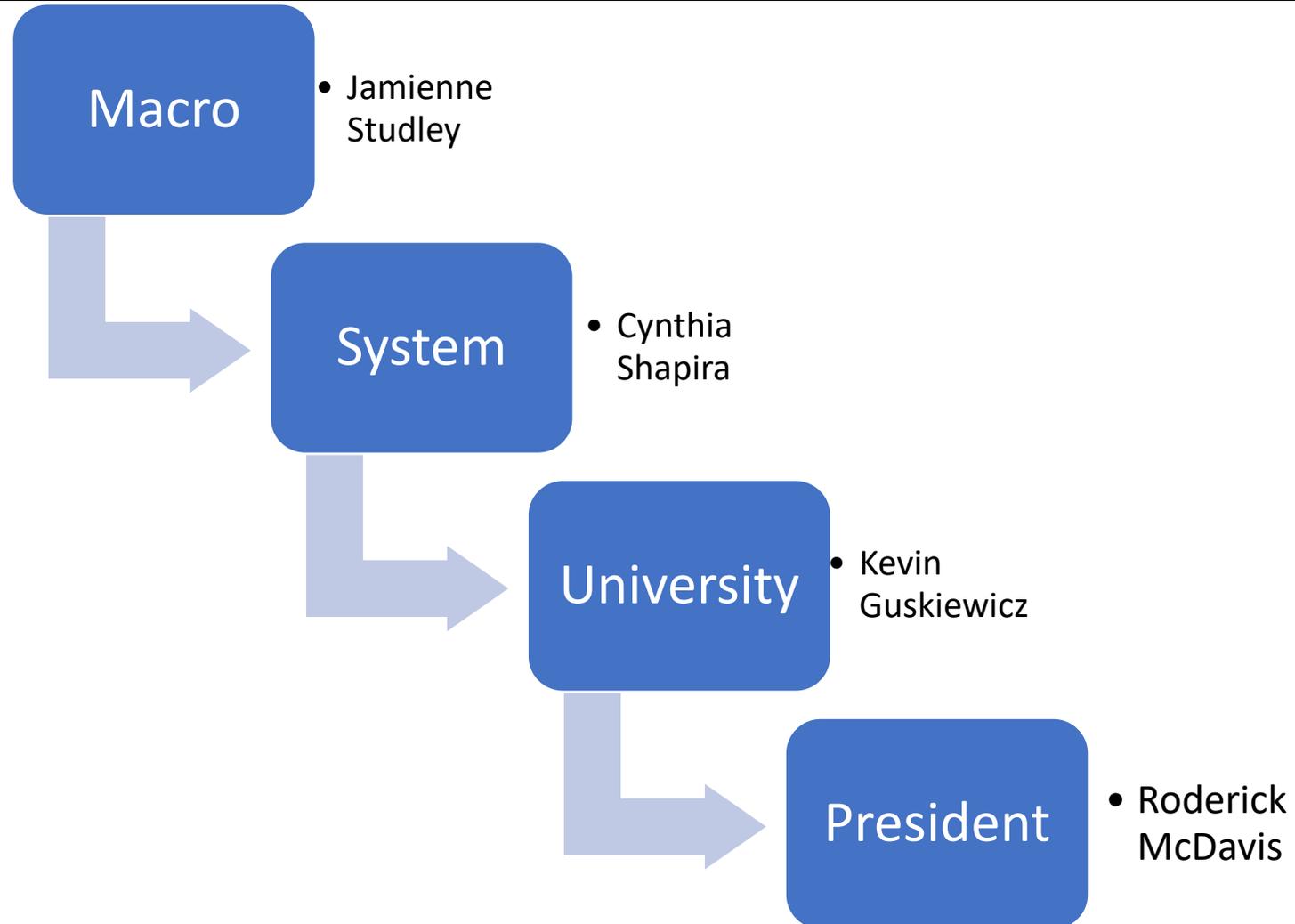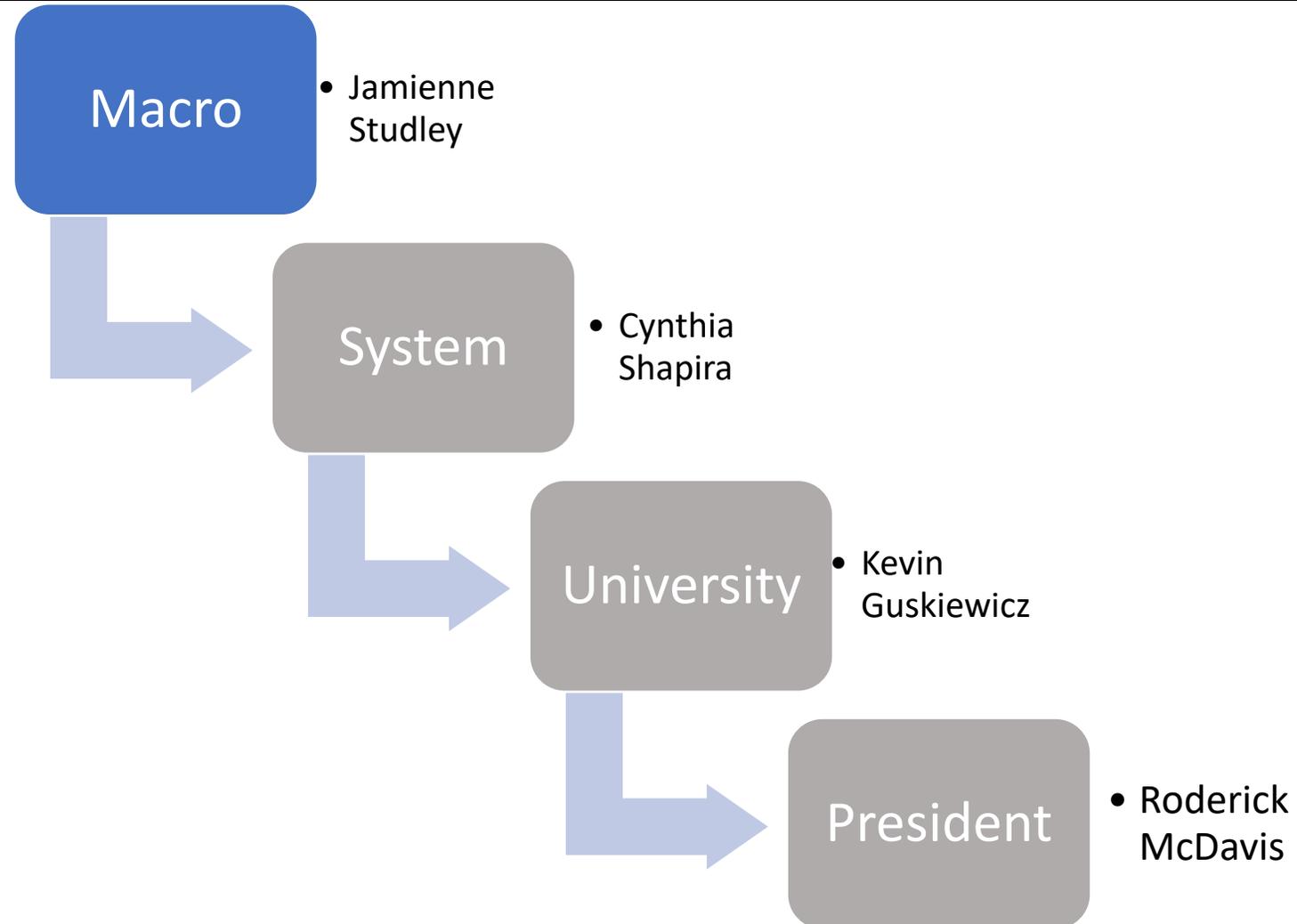**Priorities
Objectives
Initiatives
Actions**

Key Strategic Metrics

You should create a dashboard of strategic metrics and goals for your institution and track progress toward the goals

Agenda

Macro
- Jamienne Studley

System
- Cynthia Shapira

University
- Kevin Guskiewicz

President
- Roderick McDavis

Source: Dr. Paul N. Friga

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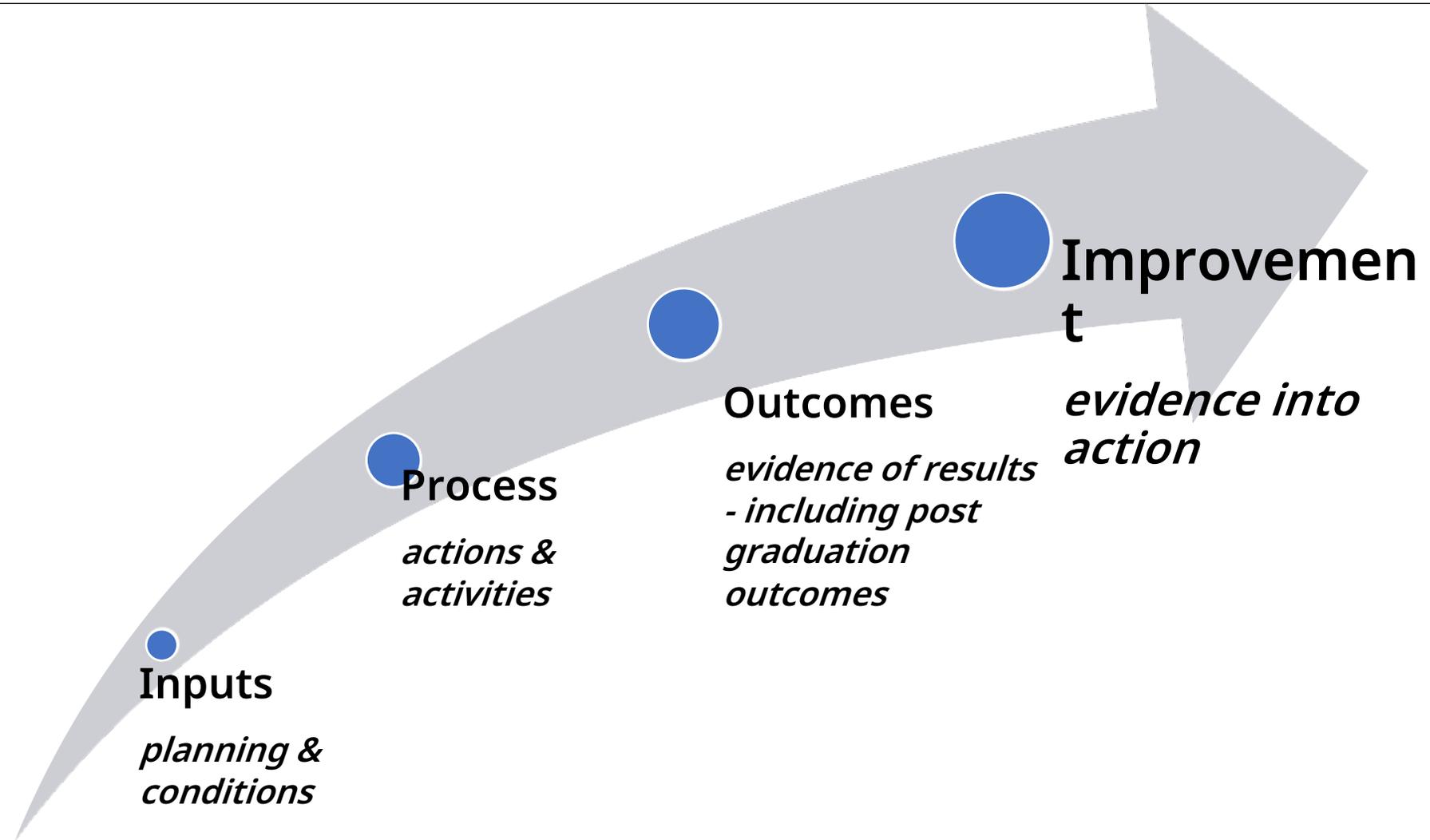- Roderick McDavis

WSCUC – Excellence. Equity. Engagement.

- Committed to advancing quality and equitable student success by fostering inquiry, innovation, excellence, and sustainability

- Institutional accreditor recognized by the Department of Education (ED), responsible for assuring the public and the higher education community of accountability and promoting improvement

Accreditation's Quality Improvement Journey

Improvement

evidence into action

Outcomes

evidence of results - including post graduation outcomes

Process

actions & activities

Inputs

planning & conditions

The challenge…

"Accreditors repeatedly refer to 'using' data in reviews, but there is little evidence that accreditors integrate data into the review process or base consequences on data."

Nathan Arnold, Mamie Voight, Jessica Morales, Kim Dancy, and Art Coleman, "Informing Improvement: Recommendations for Enhancing Accreditor Data-Use to Promote Student Success and Equity" Institute for Higher Education Policy, June 2019, http://www.ihep.org/research/publications/informing-improvement-recommendations-enhancing-accreditor-data-use-promote.

Source: Jamienne S. Studley

Better Conversations, Better Data
Key Indicators Dashboard (KID)

What?

- Public facing, web-based data visualization tool

- https://www.wscuc.org/

Why?

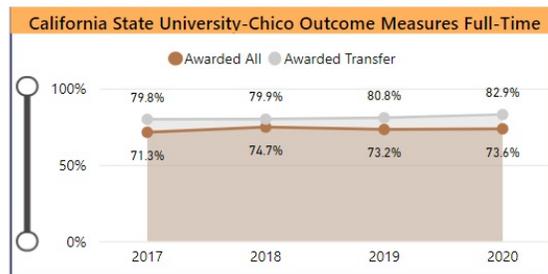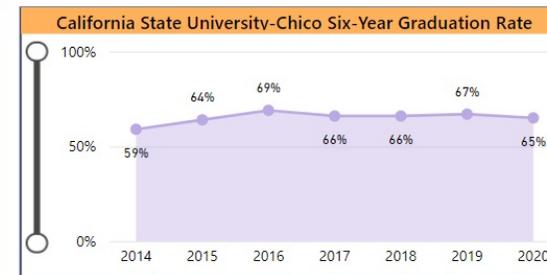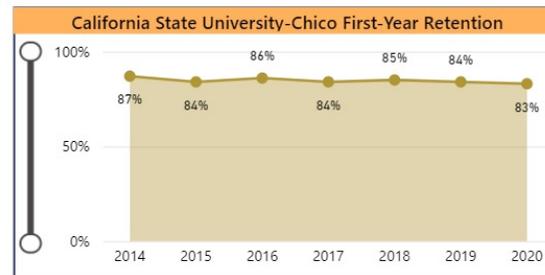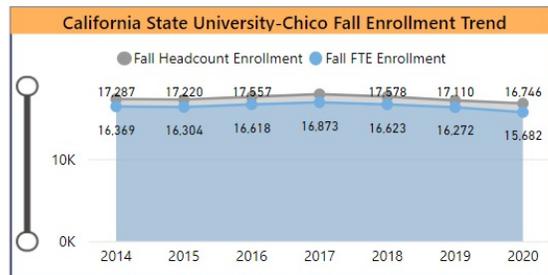*Strengthening the accreditation process*

- Enhancing use of outcomes information for improvement and decisions

- Using information as a catalyst for institutional planning, coordination and results

- Upgrading the universe and presentation of outcomes data

- Putting performance in context using trends, averages, and peer institutions

Funded by Lumina Foundation

Source: Jamienne S. Studley

KID Purposes

Goal of KID is to provide the tools and training for institutions, team members, and Commissioners to use data effectively to:

- Stimulate conversations across entire institution that lead to continuous improvement

- Evaluate and monitor educational quality

- Support insightful, constructive lines of inquiry

- Encourage informed conversations about programs, processes, priorities, strengths, and challenges within and with institutions

- Contribute to understanding whether institutions are meeting the Standards

- Place current institutional performance in the context of past performance

- Identify performance trends that deserve attention

Data Included in KID

Institution Data Summary for California State University-Chico

Use of KID in the WSCUC Accreditation Process

WASC | Senior College and University Commission

Institutional Reports
(e.g., self-study, interim, etc.)

Peer Review Teams
review: questions, conversations

WSCUC Commission
panel reviews and decisions

Actively Integrating KID in WSCUC & Institutional Culture, Process & Decisions

Source: Jamienne S. Studley

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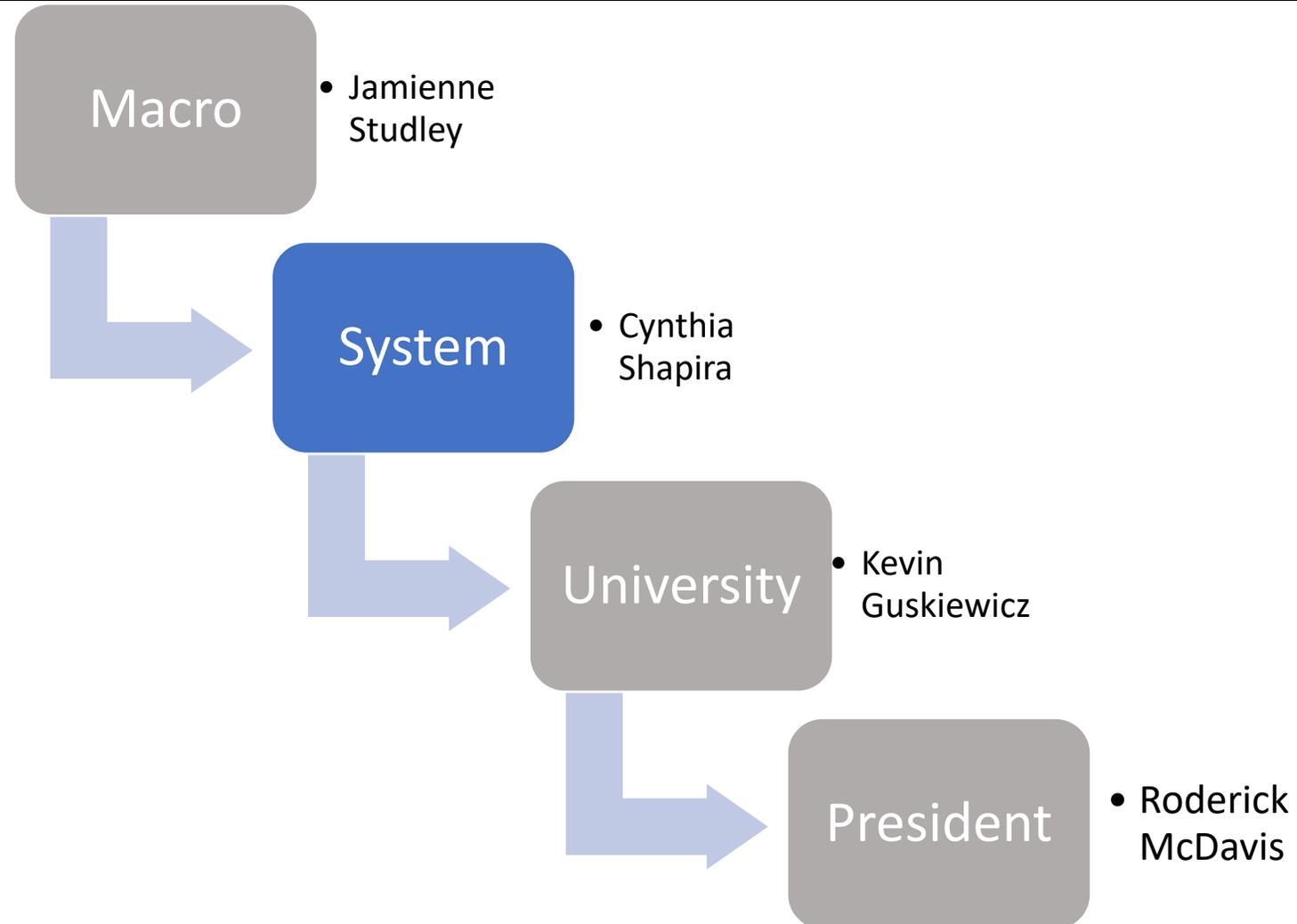
Transforming PASSHE

FROM:
Limited student mobility & choice

TO:
Expanded student mobility & choice

FROM:
Centralized strategic leadership

TO:
Enterprise-wide strategic leadership

FROM:
Politically driven outcomes

TO:
Student-centered outcomes

Source: Cynthia Shapira

Using Data to Drive Transformation

Where we were:

- Collected data inconsistently on "everything" and used little for decision-making

- Struggled to connect data to accountability

- Based advocacy efforts more on anecdote rather than data

Where we are:

- Focus on key metrics and data that are transparent, consistent, and accurate

- Use data to drive institutional strategic planning and budgeting

- Hold leaders and institutions accountable

- Use date to inform system-level decision-making and advocacy

Key Board Approved Metrics (BAMs)

Six-Year Graduation Rate

University Reserves

Average Net Price

Second-Year Persistence Rate

Annual Operating Margin

Student-to-Faculty Ratio

Enrollment

Source: Cynthia Shapira

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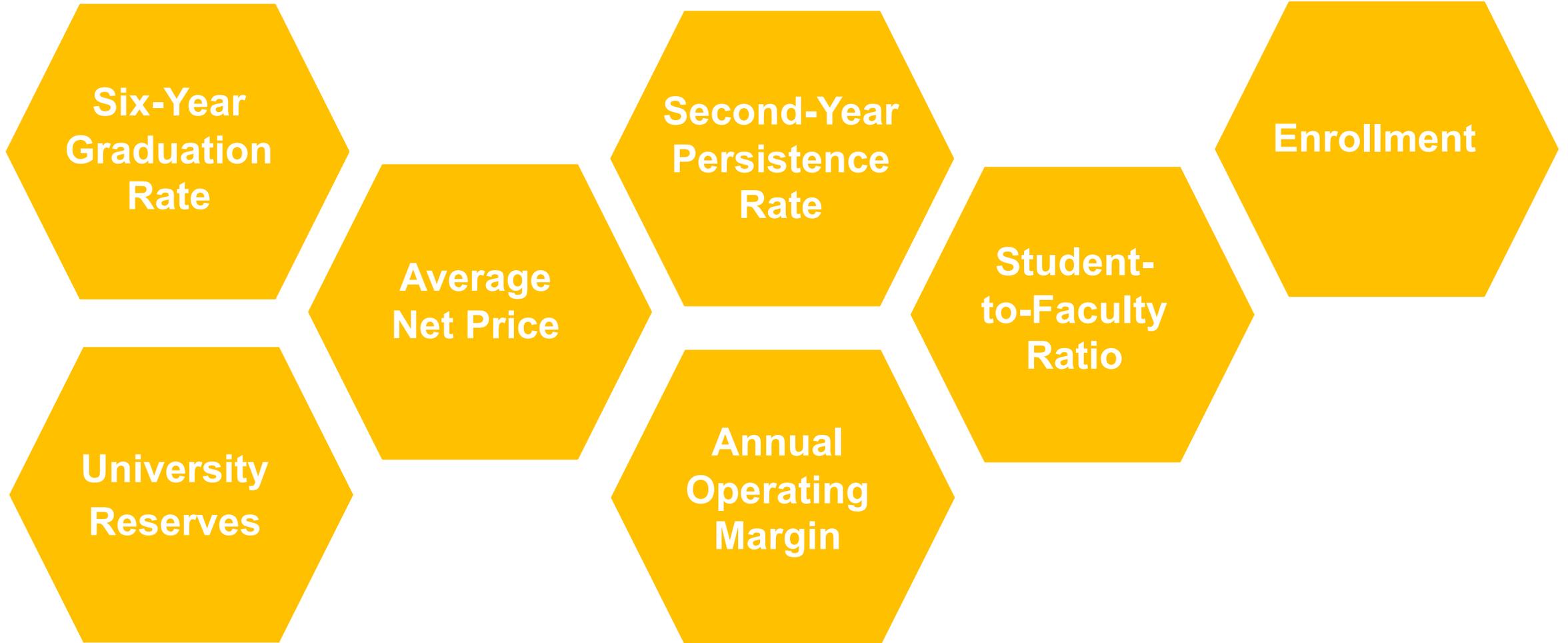
Lessons Learned: Data-Informed Decision Making....

Enhances accountability vertically and horizontally across the organization

Breeds a culture of trust in decision making at the Board-level and beyond

Helps shift the focus from politically driven outcomes to student-centered outcomes

Goethe:

All theory, dear friend, is grey, but the golden tree of actual life springs ever green. Just trust yourself and you'll learn the art of living.

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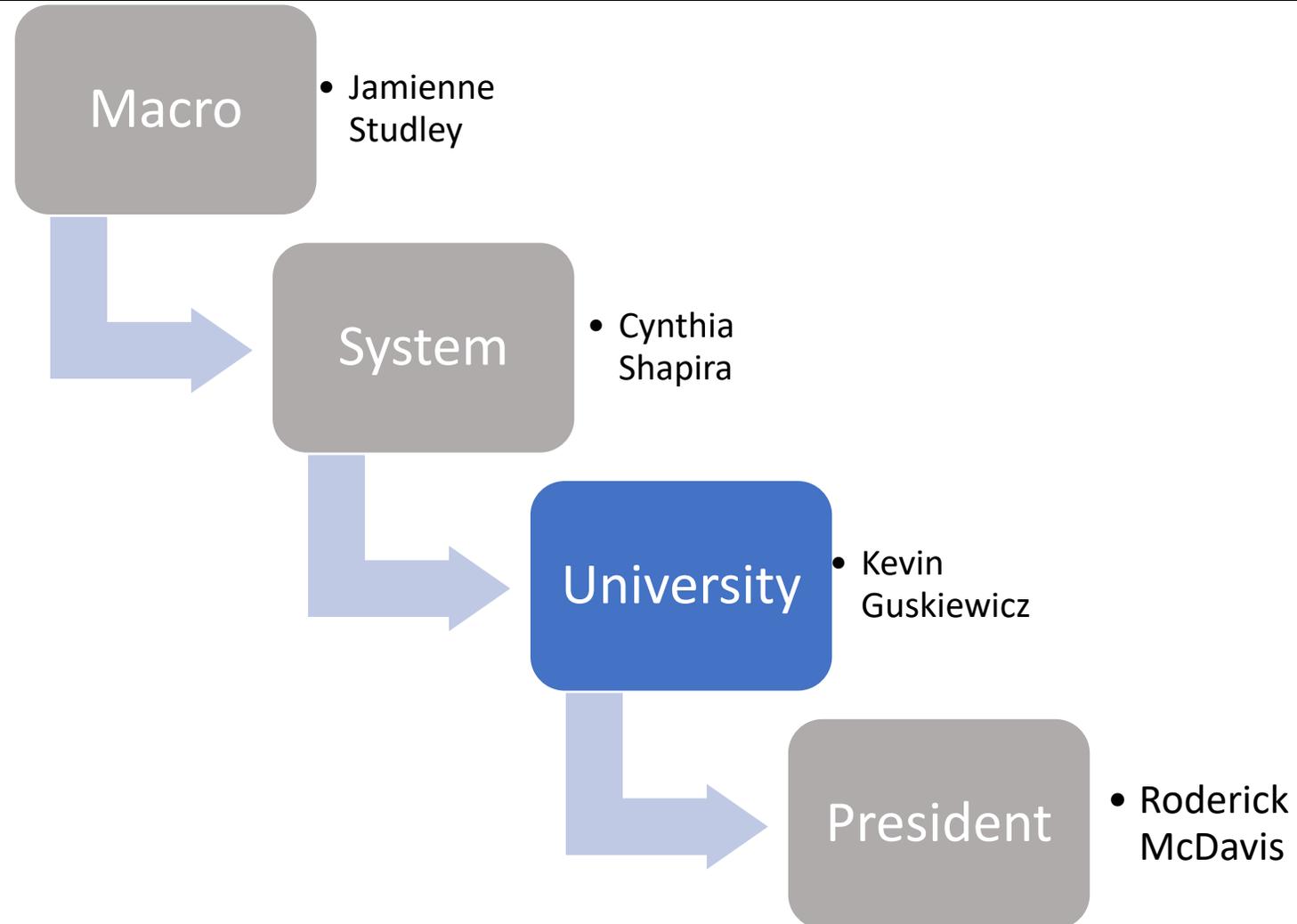
UNC System Strategic Priorities

ACCESS

The UNC system must continue its proud heritage of access and student diversity.

AFFORDABILITY AND EFFICIENCY

Ensure a UNC education is within the financial means of all in the state.

STUDENT SUCCESS

Increase degree attainment and ensure value and relevance for students.

ECONOMIC IMPACT AND COMMUNITY ENGAGEMENT

Deepening partnerships that strengthen local communities and the state's economy.

EXCELLENT AND DIVERSE INSTITUTIONS

Help institutions achieve excellence within individual missions.

Source: Kevin Guskiewicz

Each University has Distinct Areas of Focus

University	Distinct Area 1	Distinct Area 2
Appalachian State University	Envisioning a Just and Sustainable Future	Global Engagement: Education Abroad
East Carolina University	Cultural Champion	Social Mobility
Elizabeth City State University	Aviation Science Program	Student Success
Fayetteville State University	**Facilitating Higher Education Attainment by Military-Affiliated Students**	**High Quality and Affordable Online Education**
North Carolina A&T University	Minority Engineer Production	COBE Accountants Production
North Carolina Central University	Jazz Studies	Intellectual Property Legal Education
North Carolina School of Science and Math	Equity of Access for High School Students Statewide	Increasing Participation in Research
North Carolina State University	Lab to Market Innovation – Partnerships with the Private Sector	Engineering and Agriculture, Our Land-Grant Foundation
University of North Carolina at Asheville	High Impact Practices in Liberal Arts Education	Co-curricular Learning Experiences
University of North Carolina at Chapel Hill	**Creating Scientists: Learning by Connecting, Doing, and Making**	**Undergraduate Business Education**
University of North Carolina at Charlotte	Data Science Initiative	Community Engagement
University of North Carolina at Greensboro	Health and Wellness	Visual and Performing Arts
University of North Carolina at Pembroke	Regional Health	Regional Economic Development
University of North Carolina at Wilmington	UNCW and the Marine Sciences	New Academic Programs Serving Regional Needs
University of North Carolina School of the Arts	Expand and Enhance Filmmaking Programs	Increase AP Participation
Western Carolina University	Cultural and Environmental Immersion	Service and Outreach
Winston-Salem State University	Signature Liberal Education Experience	Signature Graduate and Professional Programs

Source: University of North Carolina

Source: Kevin Guskiewicz

UNC Chapel Hill's Key Strategic Metrics

ACCESS

- Increase Low-Income Enrollment
- Increase Completions by Low-Income Students
- Increase Rural Enrollment
- Increase Completions by Rural Students
- Improve Transition from K-12 to College
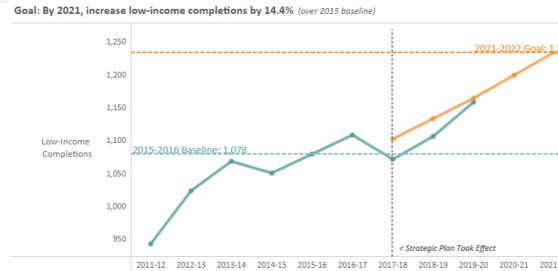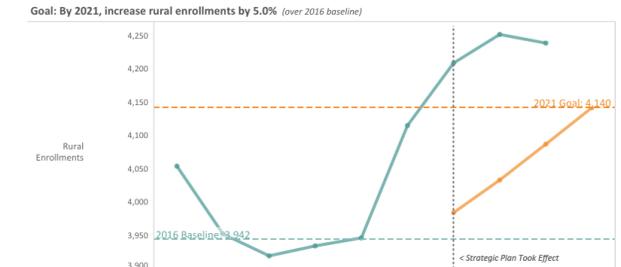
AFFORDABILITY & EFFICIENCY
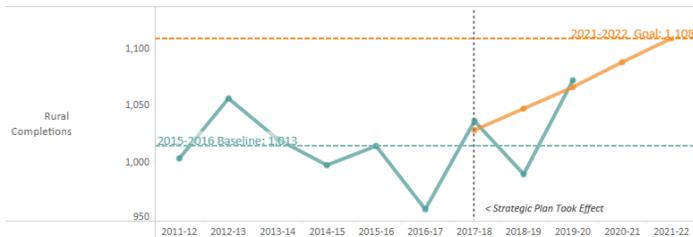
- Increase 5-Year Graduation Rate
- Increase Undergraduate Degree Efficiency
- Close Achievement Gaps
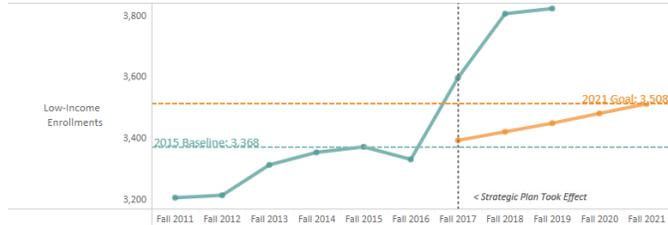- Implement a Survey of Current Students and Alumni
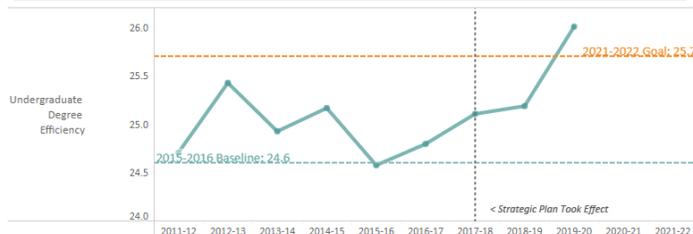
STUDENT SUCCESS

- Commit to Affordable Tuition
- Increase Operational and Financial Flexibility

ECONOMIC IMPACT & COMMUNITY ENGAGEMENT

- Increase Critical Workforce Credentials
- Increase Research Productivity
- Increase Investment in Strengthening North Carolina Communities

EXCELLENT & DIVERSE INSTITUTIONS

- Identify Academic 'Areas of Distinction'
- Focus on Human Capital

Source: Kevin Guskiewicz

Outcomes – Measuring Progress Against Goals
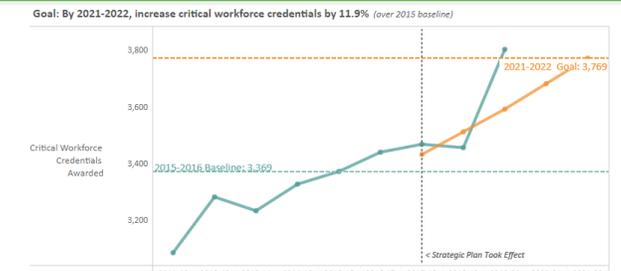
And don't forget the personal side to metrics!

MESSAGE FROM

Kevin M. Guskiewicz

CHANCELLOR

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

Dear Carolina Community,

Chancellors spend a lot of time talking about metrics. Graduation rates, degree efficiency, research funding — progress you can measure on a spreadsheet. That's the language of public policy, of strategic plans and institutional roadmaps. It's one of the ways we make sense of progress at a university like Carolina.

All of this can sound a little abstract, but there are real people behind the numbers. When we reported to the UNC System this week that enrollments of students from rural areas and in low-income economic brackets have increased over the last five years, we were describing hundreds more students from across our big and diverse state who found a welcome home in Chapel Hill.

When we reported improved graduation rates for low-income students, we were talking about hundreds of young people who were able to finish their studies on time with minimal debt. They head into the world well-prepared through a liberal arts curriculum that balances expertise in a specific field with breadth of knowledge across multiple disciplines with an emphasis on experiential education — study abroad, internships and research opportunities.

When we shared our growth in science and technology degrees, we were celebrating thousands more students who have been able to study what they love while meeting the growing demand in North Carolina for talented thinkers in critical fields. That doesn't just benefit our graduates. It benefits our state, nation and world.

When we tell state policymakers that we're on track to earn more than a billion dollars in sponsored research for the third consecutive year, they know that translates into new discoveries, new jobs and improvements in health and wellbeing that change lives well beyond Chapel Hill.

None of this happens by accident. When you set ambitious goals, people get to work making them happen. Faculty and staff go the extra mile in mentoring students. Researchers think big about their next grant application. Academic advisors and career counselors strategically steer more diverse students into high-demand fields. Our boards and lawmakers advocate passionately for the resources we need.

I'm proud that we're part of a public university system that encourages bold thinking about how to serve our state. A lot of my fellow UNC System chancellors were in Chapel Hill this week, and I love getting to spend time with them and learn from what they're doing to tackle our shared challenges. We already have a lot of great partnerships with our sister schools, and I hope we can build even more.

Metrics aren't just about numbers, they're about impact, and these are just some of the ways we accomplish our mission of educating the next generation of leaders, serving our state and world and delivering cutting-edge research that changes lives.

Sincerely,

Kevin M. Guskiewicz
Chancellor
February 25, 2022

Source: Kevin Guskiewicz

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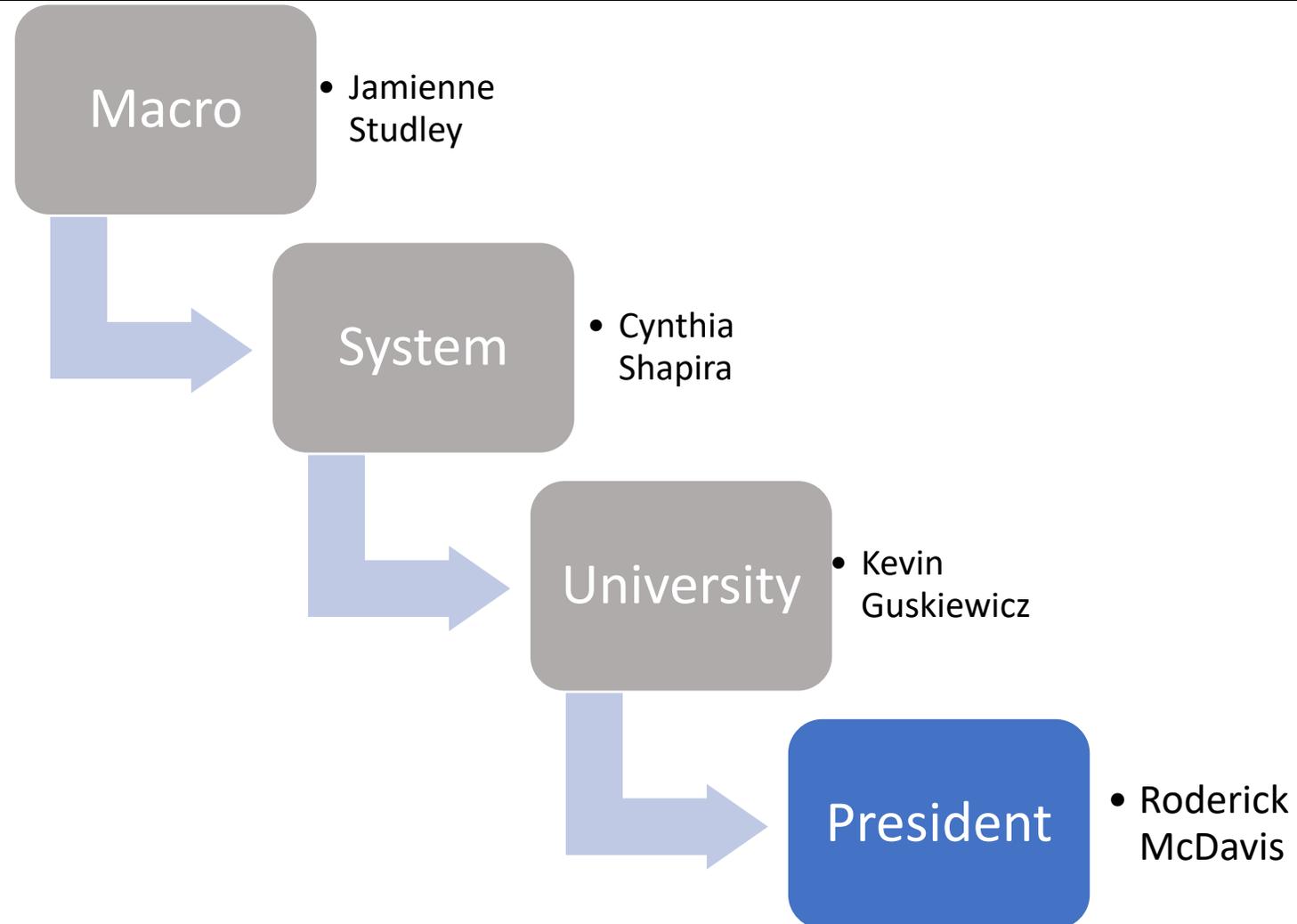
Presidential Candidate Assessment

1. Effective Communication Skills

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

2. Demonstrated Ability to Develop a Strategic Plan

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

3. Experience as a Student-Centered Leader

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

4. Demonstrated Success with Fundraising

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

5. Demonstrated Success Managing a Complex Budget

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

6. Experience with Shared Governance

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

7. Demonstrated Success with Implementing Diversity, Equity, and Inclusion Initiatives

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

8. Demonstrated Experience with Crisis Management

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

9. Experience Leading and Implementing Change and Transformation

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

10. Experience Working with a Governing Board

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

11. Experience Working with Elected Leaders

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

12. Experience with Collaboration and Building Partnerships

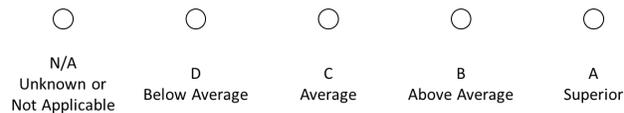| N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

Source: Roderick McDavis

Strategic Metrics to Assess a President – Aligned with the Institution

1. Increase Retention Rates

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○
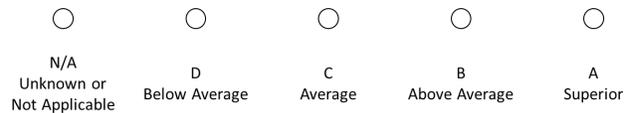
2. Increase Graduation Rates

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○

3. Increase First Year and Overall Enrollment

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○
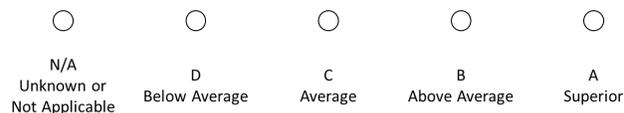
4. Decrease Acceptance Rate of Admitted Students in Freshman Class

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○
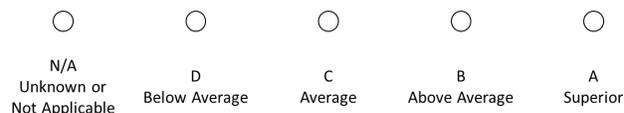
5. Increase Diversity of Students, Faculty, and Staff

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○
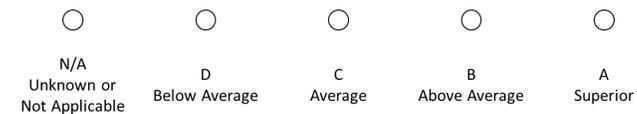
6. Increase Research Expenditures

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○
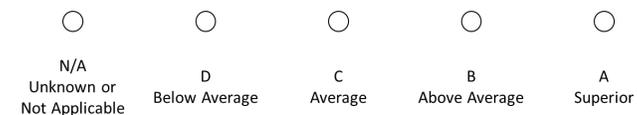
7. Increase Annual Philanthropic Support

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○
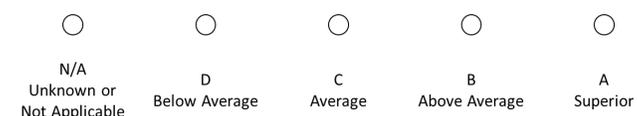
8. Increase US News & World Report or Other National Rankings

N/A Unknown or Not Applicable	D Below Average	C Average	B Above Average	A Superior
○	○	○	○	○