

STETSON UNIVERSITY

TO: The Stetson University Board of Trustees

FROM: Angela Henderson, Ph.D.
Executive Director of Institutional Research and Effectiveness

SUBJECT: Key Performance Indicators (KPIs)

DATE: January 22, 2021

The Office of Institutional Research and Effectiveness (IRE) has compiled and summarized Stetson's key performance indicators (KPIs) in an effort to provide timely and contextual information to inform the work of the Board of Trustees, President's Cabinet, and other university stakeholders.

This report provides an update on the 2020-21 successes and areas for improvement in relation to the 2022 assumptions established last year. These KPIs represent our best estimates of our major outcomes. The leadership team is committed to understanding our successes and our shortcomings, and adapting to ensure the long-term sustainability and success of the University. The KPIs provide detailed data that serve as a scorecard for monitoring and reporting our progress.

Review of the current status of the 20 KPIs indicates that the University has met or exceeded several of the projected 2022 assumptions in the 2020-21 year. Both the total JD and LLM headcount for the College of Law and total graduate Fall headcount for DeLand exceeded 2022 KPI assumptions.

Given the impact of COVID-19, it is not surprising that a lower number of KPIs were found to be at or above the assumption in comparison to prior year. Despite the challenges facing the institution during the 2020-21 year, seven KPIs were within five percent of the 2022 assumption (total undergraduate Fall headcount, FTIC first to second year retention rate, FTIC six-year graduation rate, COL full-time JD three-year graduation rate, full-time first-year JD net tuition revenue, planned giving, and College of Law rate of employment).

KPIs found to be have the largest margin from the 2022 assumption were those most impacted by COVID-19 (alumni engagement (DeLand and COL), JD Bar passage rate, FTIC net tuition revenue, FTIC undergraduate discount rate, full-time first-year JD discount rate, and post-graduate success rate).

Detailed information on the progress of each KPI is shown on the "2020-21 KPI Progress Update" on the following page.

2020-21 KPI PROGRESS TOWARD 2022 ASSUMPTIONS

Key Performance Indicators	2019-20 Actual	2020-21 Actual	2022 Assumption	2020-21 Relation to 2022 Assumption	2020-21 Distance from 2022 Assumption	2020-21 Percent of 2022 Assumption	Related Roll Ahead Goal
ENROLLMENT, RETENTION, AND GRADUATION							
1 Total Undergraduate Fall Headcount (excluding ADC)	3,180	3,125	3,244	Below	-119	96.3%	Demand, National Reputation and Value Proposition
2 Total JD and LLM COL Fall Headcount (Full-time and Part-time)	909	939	931	At or Above	8	100.9%	Demand, National Reputation and Value Proposition
3 Total Graduate Fall Headcount (DeLand)	319	383	345	At or Above	38	111.0%	Demand, National Reputation and Value Proposition
4 FTIC Undergraduate First to Second Year Retention Rate	77.4%	76.2%	79%	Below	-2.8%	96.5%	Learning Excellence
5 FTIC Undergraduate Six-Year Graduation Rate	65.1%	64.2%	65%	Below	-0.8%	98.8%	Learning Excellence
6 COL Full-time JD First to Second Year Retention Rate	92.9%	88.2%	93%	Below	-4.8%	94.8%	Learning Excellence
7 COL Full-time JD Three-year Graduation Rate	85.7%	88.3%	90%	Below	-1.7%	98.1%	Learning Excellence
FINANCE							
8 FTIC Undergraduate Discount Rate	64.4%	67.3%	61.2%	Above	6.1%	90.0%	Financial Transparency and Translation
9 FTIC Net Tuition Revenue	\$15,839,499	\$13,894,329	\$18,440,554	Below	-\$4,546,225	75.3%	Financial Transparency and Translation
10 Full-time First-Year JD COL Discount Rate	36.2%	41.9%	36.0%	Above	5.9%	83.6%	Financial Transparency and Translation
11 Full-time First-Year JD COL Net Tuition Revenue	\$7,265,294	\$7,347,440	\$7,570,801	Below	-\$223,361	97.0%	Financial Transparency and Translation
12 Graduate DeLand Total Net Tuition Revenue	\$4,422,000	\$5,172,000	\$5,638,464	Below	-\$466,464	91.7%	Financial Transparency and Translation
ADVANCEMENT AND ENDOWMENT							
13 Planned Giving Inventory	\$136,367,421	\$152,582,240	\$156,367,421	Below	-\$3,785,181	97.6%	Campaign
14 Endowment Assets as of 6/30	\$255,416,253	\$298,565,991	\$315,000,000	Below	-\$16,434,009	94.8%	Campaign
15 Alumni Engagement Indicator (% of Undergraduate Alumni Giving)	7.6%	5.9%	12%	Below	-6.1%	49.3%	Campaign
16 COL Alumni Engagement Indicator (% of COL Alumni Giving)	6.7%	3.6%	10%	Below	-6.4%	36.0%	Campaign
POST-GRADUATE OUTCOMES							
17 Post-graduate success (Enrollment + Employment Rate; six months out)	88.0%	80.9%	92%	Below	-11.1%	87.9%	Demand, National Reputation and Value Proposition
18 COL JD Bar Passage Rate - % above state average (combined results of February and July (October) Bar; first time test takers)*	3.7%	4.5%	10%	Below	-5.5%	45.0%	Demand, National Reputation and Value Proposition
19 COL Ultimate Bar passage rate (all test takers (FT and PT) over a two year period)	N/A	Not Available**	90%	N/A	N/A	N/A	Demand, National Reputation and Value Proposition
20 COL Rate of Employment-Bar Passage Required and JD Advantage (10 months out)	87.7%	91.0%	92%	Below	-1.0%	98.9%	Demand, National Reputation and Value Proposition

*July Bar test rescheduled to October due to Covid-19

**Graduate data from all states not yet available