

STETSON UNIVERSITY

TO: The Stetson University Board of Trustees

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

SUBJECT: Key Performance Indicators (KPIs)

DATE: February 6, 2020

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 and President's Cabinet.

This report provides an update on the 2019 successes and areas for improvement in relation to the 2020 assumptions and an overview of the revised KPIs and assumptions for 2022.

Update on 2019 KPI Progress

Detailed information on the progress of each KPI is shown on the "2019-20 KPI Progress Toward 2020 Assumptions" document.

2022 KPIs and Assumptions

As we approached the end of the previous 2020 forecast period, the President and her cabinet met to update the KPIs, reconsider the timeframe for projection, and set appropriate assumptions for each KPI metric. The Cabinet reviewed the existing KPIs in fall of 2019 and proposed revisions and assumptions for FY2022. The proposed changes and assumptions were reviewed by Dr. Libby, Dr. Painter, and Dr. Henderson to ensure alignment with institutional priorities and data.

Although the majority of KPIs were not modified to ensure consistency of measurement over time, several KPIs were redefined to better represent Stetson's achievements and successes.

Revisions included:

- combination of prior KPIs 18 and 19 (percent of undergraduates attending graduate school within six months and percent of undergraduates employed within six months) into a single post-graduate success KPI,
- removal of Comprehensive Campaign KPI (KPI 17), and
- addition of a second post-graduate outcome measure for the College of Law related to the Ultimate Bar passage rate.

2019-20 KPI PROGRESS TOWARD 2020 ASSUMPTIONS

Key Performance Indicators	2017-18 Actual	2018-19 Actual	2019-20 Actual	2020 Assumption	2019-20 Distance from 2020 Assumption	Relation to 2020 Assumption
ENROLLMENT, RETENTION, AND GRADUATION						
1 Total Undergraduate Headcount - Fall (excluding ADC)	3,069	3,130	3,180	3,222	-42	Close to
2 Total JD and LLM COL Headcount - Fall	865	896	927	863	64	At or Above
3 Total Graduate Headcount (DeLand) - Fall	322	295	319	420	-101	Below
4 FTIC Undergraduate First to Second Year Retention Rate	78.4%	76.4%	77.4%	83.0%	-5.6%	Below
5 FTIC Undergraduate Six Year Graduation Rate	62.3%	61.3%	65.1%	65.0%	0.1%	At or Above
6 COL Full-time JD First to Second Year Retention Rate	89.5%	91.3%	92.9%	91.0%	1.9%	At or Above
7 COL Full-time JD Three-year Graduation Rate	90.3%	87.8%	85.7%	89.0%	-3.3%	Below
FINANCE						
8 FTIC Undergraduate Discount Rate	61.7%	63.1%	64.4%	59.8%	4.6%	Above
9 FTIC Net Tuition Revenue	\$14,739,986	\$15,201,499	\$15,839,499	\$18,211,961	-\$2,372,462	Below
10 Full-time First Year JD COL Discount Rate	32.6%	35.3%	36.2%	29.0%	7.2%	Above
11 Full-time First Year JD COL Net Tuition Revenue	\$6,571,530	\$7,655,360	\$7,265,294	\$7,112,398	\$152,896	At or Above
12 Graduate DeLand Total Net Tuition Revenue	\$5,422,000	\$5,296,000	\$4,422,000	\$5,815,000	-\$1,393,000	Below
ADVANCEMENT AND ENDOWMENT						
13 Planned Giving Inventory	\$120,524,661	\$127,791,471	\$136,367,421	\$125,000,000	\$11,367,421	At or Above
14 Endowment Assets	\$228,734,827	\$242,868,488	\$255,416,253	\$243,000,000	\$12,416,253	At or Above
15 Alumni Engagement Indicator (Percentage of Undergraduate Alumni Giving)	8.8%	9.0%	7.6%	15.0%	-7.4%	Below
16 COL Alumni Engagement Indicator (Percentage of COL Alumni Giving)	4.8%	6.5%	6.7%	10.0%	-3.3%	Below
17 Comprehensive Campaign as of 6/30 (*adjusted to include planned giving)	\$112,700,280	\$144,717,940	\$218,628,965	\$200,000,000*	\$18,628,965	At or Above
POST-GRADUATE OUTCOMES						
18 Enrollment Rate: Undergraduates Pursuing Graduate Degrees (6 months post-graduation)	20.0%	21.0%	21.0%	30.0%	-9.0%	Below
19 Employment Rate: Undergraduates Employed (6 months post-graduation)	69.0%	70.0%	71.0%	65.0%	6.0%	At or Above
20 COL Full-time JD Bar Passage (% Above State Average)	5.5%	0.0%	3.7%	15.0%	-11.3%	Below
21 COL Rate of Employment-Bar Passage Required and JD Advantage (10 months out)	86.0%	83.0%	87.7%	88.0%	-0.3%	Close to