

**TO: The Stetson University Board of Trustees**

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**Executive Director of Institutional Research and Effectiveness**

**SUBJECT: Key Performance Indicators (KPIs)**

**DATE: January 21, 2022**

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

This report provides the most recently available official data for the 20 KPIs as of January 21, 2022, and identifies successes and areas for improvement in relation to the 2022 assumptions established in 2020. Several of the KPIs met or exceeded the 2022 assumption, which given the assumptions were created prior to the global pandemic, demonstrates a considerable resiliency in the face of unprecedented adversity. Assumptions for 2024 will be established within the coming months.

<b>Distance from Assumption</b>	<b>KPIs</b>
At or Above	6 of 20 (30%)
Within 5%	5 of 20 (25%)
Within 5.01% – 10%	3 of 20 (15%)
Below by more than 10%	6 of 20 (30%)

***Areas of success***

- *Advancement and Endowment*

Both alumni giving rates among undergraduates and College of Law graduates rebounded nicely from last year, returning to pre-pandemic levels. Endowment assets exceeded assumption by 22.9% and the planned giving inventory also met assumption.

***Areas for continued attention***

- *Enrollment, Retention, and Graduation*

At the undergraduate level, all three phases of student progression have struggled and remain perennial challenges for the DeLand campus. Conversely, enrollment boons were recorded at the graduate level and College of Law. Although the retention of new law students remains lower, the graduation rate continues to climb and only narrowly missed the assumption (0.4%).

- *Finance*

Discount continues to rise among both first-time in college (FTIC) students and law students, although the net tuition revenue (NTR) on the new law students did exceed the assumption by over \$400,000. Coupled with a very strong graduate NTR of almost one million over the assumption, these successes slightly mitigate but ultimately are unable to counter the low NTR on the FTIC cohort.

- *Post-Graduate Outcomes*

The market continues to be a challenging one for recent graduates, with success rates below assumption among both undergraduate and law students. The undergraduate success rate, however, did rebound to pre-pandemic levels. Bar passage shows signs of a rebound as well, increasing its positive distance from the rest of the state, yet remains below assumption as well.

Detailed information on the progress of each KPI is shown on the following page.

## 2021-22 PROGRESS TOWARD 2022 KPI ASSUMPTIONS

Key Performance Indicators	2020-21 Actual	2021-22 Actual	2022 Assumption	2021-22 Relation to 2022 Assumption	2021-22 Distance from 2022 Assumption	2021-22 Percent of 2022 Assumption	Related Roll Ahead Goal
<b>ENROLLMENT, RETENTION, AND GRADUATION</b>							
1 Total Undergraduate Fall Headcount (excluding ADC)	3,125	2,884	3,244	Below	-360	88.9%	Demand, National Reputation and Value Proposition
2 Total JD and LLM COL Fall Headcount (Full-time and Part-time)	939	979	931	At or Above	48	105.2%	Demand, National Reputation and Value Proposition
3 Total Graduate Fall Headcount (DeLand)	383	425	345	At or Above	80	123.2%	Demand, National Reputation and Value Proposition
4 FTIC Undergraduate First to Second Year Retention Rate	76.2%	72.2%	79%	Below	-6.8%	91.4%	Learning Excellence
5 FTIC Undergraduate Six-Year Graduation Rate	64.2%	63.3%	65%	Below	-1.7%	97.4%	Learning Excellence
6 COL Full-time JD First to Second Year Retention Rate	88.2%	89.1%	93%	Below	-3.9%	95.8%	Learning Excellence
7 COL Full-time JD Three-year Graduation Rate	88.3%	89.6%	90%	Below	-0.4%	99.6%	Learning Excellence
<b>FINANCE</b>							
8 FTIC Undergraduate Discount Rate	64.2%	67.7%	61.2%	Below	-6.5%	90.4%	Financial Transparency and Translation
9 FTIC Net Tuition Revenue	\$14,286,276	\$12,373,577	\$18,440,554	Below	-\$6,066,977	67.1%	Financial Transparency and Translation
10 Full-time First-Year JD COL Discount Rate	41.9%	45.9%	36.0%	Below	-9.9%	78.4%	Financial Transparency and Translation
11 Full-time First-Year JD COL Net Tuition Revenue	\$7,347,440	\$7,979,658	\$7,570,801	At or Above	\$408,857	105.4%	Financial Transparency and Translation
12 Graduate DeLand Total Net Tuition Revenue	\$5,172,000	\$6,541,000	\$5,638,464	At or Above	\$902,536	116.0%	Financial Transparency and Translation
<b>ADVANCEMENT AND ENDOWMENT</b>							
13 Planned Giving Inventory	\$152,582,240	\$156,716,928	\$156,367,421	At or Above	\$349,507	100.2%	Campaign
14 Endowment Assets as of 6/30	\$306,140,929	\$387,215,324	\$315,000,000	At or Above	\$72,215,324	122.9%	Campaign
15 Alumni Engagement Indicator (% of Undergraduate Alumni Giving)	5.9%	6.7%	12%	Below	-5.3%	55.8%	Campaign
16 COL Alumni Engagement Indicator (% of COL Alumni Giving)	3.7%	6.7%	10%	Below	-3.3%	67.0%	Campaign
<b>POST-GRADUATE OUTCOMES</b>							
17 Undergraduate post-graduate success (Enrollment + Employment Rate; six months out)	81.0%	89.0%	92%	Below	-3.0%	96.7%	Demand, National Reputation and Value Proposition
18 COL JD Bar Passage Rate - % above state average (combined results of February and July Bar; first time test takers)	4.5%	6.1%	10%	Below	-3.9%	61.0%	Demand, National Reputation and Value Proposition
19 COL Ultimate Bar passage rate (all test takers (FT and PT) over a two year period)	86.6%	87.0%	90%	Below	-3.0%	96.7%	Demand, National Reputation and Value Proposition
20 COL Rate of Employment-Bar Passage Required and JD Advantage (10 months out)	86.5%	84.7%	92%	Below	-7.3%	92.1%	Demand, National Reputation and Value Proposition