### WASHINGTON ADVENTIST UNIVERSITY

### **Key Performance Indicators - Balanced Scorecard May 2014 – Final**

Pillar	Key Performance Indicator (KPI)	2010/11	2011/12	2012/13	5-year Trend	Goal	Target Date	Leader	
Quality	Student Retention <sup>1</sup>	69%	69%	72%	Up 20%	81%	2016	Provost	
	Graduation Rate <sup>2</sup>	28%	31%	36%	Up 50%	55%	2015	Provost	
	Learning Outcomes  Gen Ed Learning	84.5%	80.7%	87.8%	81.5 Avg	90%	Annual		
	Outcomes <sup>3</sup> Program Outcomes Licensure/ Certification <sup>4</sup>	N/A 64.0% <sup>i</sup> 67.3% <sup>iv</sup> N/A 67.3% <sup>i</sup> 58.1% <sup>i</sup> 69.5% 71.9 Avg <sup>i</sup>		90% 100%	Annual 2014	Provost			
People	Employee Engagement <sup>5</sup>	3.7	3.9	4.0	Up 8%	4	Annual	HR	
	Performance Appraisal Score <sup>6</sup>	4.0	4.3	4.0	Up 11%	4	Annual	HR	
	Staff Appraisals Faculty Appraisals	3.8 4.2	3.9 4.6	3.9 4.2	Up 8% 4.3 Avg <sup>iii</sup>	4 4		HR Provost	
	Employee Retention <sup>7</sup>	91.7%	90.5%	85.0%	89.4% Avg	Greater than 90%	Annual	HR	
Service	Student Satisfaction <sup>8</sup>	3.8	3.7	3.6	3.7 Avg	4	2015	VPSL	
	Customer Satisfaction <sup>9</sup>	4.4	4.2	4.1	4.4 Avg	4	Annual	President	
Finance	Composite Financial Index <sup>10</sup>	5.4	5.9	3.0 <sup>i</sup>	Up 7%	4.5	Annual	EVPF	
	Dept. of Education Financial Responsibility <sup>11</sup>	3.0	3.0	3.0	Up 3%	2.0 to 3.0	Annual	EVPF	
	Operating Working Capital <sup>12</sup>	10%	130%	134%	Up 709%	150%	Annual	EVPF	
	SDA Working Capital Percentage <sup>13</sup>	9%	103%	118%	Up 721%	100%	Annual		
Growth	Gifts and Grants <sup>14</sup>	\$12.8M	\$14.2M <sup>i</sup>	\$11.2M	Up 27%	\$14M	2015	VPAUR	
	State and Federal Private Donations	7.1M 1.5M	9.1M <sup>i</sup> 0.8M <sup>i</sup>	5.7M 1.1M	Up 58% Up 83%				
	Fundraising Cost to Private Donations <sup>15</sup>	21%	38%	48%	Up 26%	Less than 33%	Annual	VPAUR	
	Enrollment Headcount <sup>16</sup>	1298	1493	1402	Up 41%	1600	2015	VPEM	
	Undergraduate Graduate	1173 125	1327 166	1222 180	Up 32% Up 169%	1380 220			
	Full Time Equivalent <sup>17</sup>	1094.1	1308.4	1208.9	Up 50%	1370	2015	VPEM	
	Undergraduate Graduate	1022.3 71.8	1195.5 112.9	1081.5 127.4	Up 37% Up 270%	1225 145			
Community	Community Service <sup>18</sup>	61	N/A	73	49 Avg <sup>ii</sup>	40	2014	HR	
	Organizational Relationships <sup>19</sup>	23 <sup>i</sup>	21 <sup>i</sup>	25 <sup>i</sup>	Up 125%	20	2014	President	

Numbered notes are on the reverse side. 
<sup>i</sup> Restated from prior reports. 
<sup>ii</sup> 5-year average not available; 3-year average/trend used. 
<sup>iii</sup> 5-year average not available; 4-year average/trend used. 
<sup>iv</sup>Partial data; not all programs reported.

### Notes:

Quality

The Student Retention KPI reports the retention rate for full-time degree-seeking freshmen from the Fall of the previous year who returned in the reported Fall timeframe. For 2012/13, n=164 (2011 cohort).

The Graduation Rate KPI reports completers within 150% of the standard time to complete Baccalaureate programs (i.e., 6 years). This rate is calculated from the starting cohort of native first-time full-time degree-seeking freshmen. For 2012/13, n=126 (2007 cohort).

<sup>3</sup> Learning Outcomes reported are for General Education Learning Outcomes, for introductory and capstone courses. The percentage shown is for students assessed satisfactorily or higher for each learning outcome. For 2012-13 Basic Skills, Natural Science/Math, and Humanities were assessed; n=219, 161, and 186 (students) respectively, n=2017, 639, and 518 (observations). For 2011/12 Basic Skills, Natural Science/Math, Religion, and Humanities were assessed; n=243, 160, 26, 108 (students) respectively, n=2281, 639, 28, and 324 (observations). For 2010/11 Basic Skills, Natural Science/Math, Physical Education/ Health, and Humanities were assessed; n=182, 109, 50, and 56 (students) respectively, n=1739, 429, 598, and 168 (observations). Program learning outcomes include measures such as embedded assessments, exit exams, portfolio reviews, etc. (n=133). Programs that completed the annual program review include Business, Communication & Journalism, Education, English, History & Political Studies, Music, Psychology, Religion, Social Work, Biology, Chemistry, Bio-Chemistry, Computer Science & Math, Health & Wellness, Nursing, and Respiratory Care.

For Licensure/Certification, the 2012/13 pass rates for Nursing (NCLEX) was 60%, n=104; Respiratory (CRT 71%, n=7, and WRRT 100%, n=3), and for Education (Praxis II), 90% (n=50); all external professional exams.

# People

The **Employee Engagement** KPI reports a composite score from the annual employee job satisfaction survey. Likert scale 1 thru 5.

Employee Performance Appraisal Score - Faculty appraisals were re-implemented in 2009/10, however a subset of the full PAS (Performance Appraisal System) was used for two years. The new Faculty Performance Appraisal (FPA) was piloted in 2011/12, with an average composite score of 4.6 (n=42). Both staff and faculty evaluations are reported on a Likert scale 1 thru 5. For 2012-13, staff appraisals were n=75; faculty n=48.

The *Employee Retention* KPI is an estimate based on the number of voluntary and involuntary departures vs. WAU/WGTS full- and part-time employees.

## Service

The **Student Satisfaction** is based on the annual Graduating Student Satisfaction Survey – Likert scale 1 thru 5. We plan to utilize NSSE to assess student satisfaction and engagement. For 2012/13, n=119.

The **Customer Satisfaction** KPI reports on feedback provided by internal customers, students, alumni, and external vendors. For 2012/13, the surveys were conducted for the Admissions (n=10), Bookstore (n=17), Food Services (n=13), ITS (n=19), Student Financial Services (n=15); others less than n=10 include Accounting, Alumni and Advancement, Center for Student Success, Computer Lab, Computer Science Department, Halcyon Hall, Human Resources, OIRE, Library, Nursing Department, President's Office, Registrar, Safety and Security, SASS, SGPS, SHPSW, Student Life. Likert scale 1 thru 5.

The *Composite Financial Index* is a comprehensive measurement of the financial health of an educational institution. The **Department of Education Financial Responsibility** KPI is a quantitative econometric measurement of the ability of an institution to manage Title IV funds. The score ranges from -1.0 to 3.0. A score greater than 1.5 indicates the institution is financially responsible.

Operating Working Capital equals operating current assets minus operating current liabilities. The KPI is a percentage of working capital, computed as: [(current assets/current liabilities) - 1]. We used working capital in 10/11 to build the music building instead of borrowing funds. This provided a savings to interest expense and cash flow of approximately \$90,000. SDA Recommended Working Capital - The church requires that working capital is equal to or exceeds 20% of operating expenses. This KPI is equal to working capital / [(20% of Operating Expense) – working capital].

### <u>Growth</u>

Gifts and Grants from the annual Independent Auditors' Report – Financial Statement. It includes State & Federal Grants & Contracts (including Federal and State Financial Aid), Private Gifts & Grants, and Church Subsidies & Gifts.

The **Development Cost to Private Donations** KPI is the ratio of the cost of raising donations to private donations.

<sup>16</sup> Enrollment Headcount is the number of undergraduate and graduate students as of the official Fall Census date.

<sup>17</sup> Undergraduate *Full Time Equivalent* (FTE)'s are full-time students + the total part-time credit hours / 12. Graduate FTE's are full-time students + the total part-time credit hours / 9, as of the official Fall Census date.

 $\frac{\textbf{Community}}{^{18}} \textbf{\textit{Community Service}} \text{ is the average self-reported annual community service hours per employee. For 2012/13, n=8. No}$ hours were reported for 2011/12.

<sup>19</sup> **Organizational Relationships** is the total number of the University's partnerships, memorandums of understanding, and articulation agreements.

### **Key Performance Indicators - Benchmark Comparisons**

Comparison group data provides a context for Key Performance Indicators. Comparison against peer data is as of 2011/12, as this is the latest data that is publicly available.

Key Performance Indicator (KPI)	WAU 2011/12	National Averages <sup>41</sup>	Similar Institutions	Competitors 21,42	SDA Institutions	Aspirants <sup>23</sup>	Goal
Student Retention <sup>24</sup>	69%	77% <sup>25</sup>	71%	75%	75%	81%	90%
Graduation Rate <sup>24</sup>	31%	56% <sup>25</sup>	49%	45%	51%	70%	55%
Outcomes Scores Licensure/Certification	62.4%	75.1% <sup>26</sup>					100%
Employee Engagement	3.9	4.2 <sup>27</sup>					4.25
Employee Retention	90.5%	86% <sup>28</sup>					>90%
Student Satisfaction	3.7	3.9 <sup>29</sup>					4
Customer Satisfaction	4.2	$3.8^{30}$					4
Composite Financial Index <sup>31,41</sup>	5.9	3.2	2.3 <sup>32</sup>	3.6 <sup>33</sup>			4.5
Dept. of Education Financial Responsibility <sup>34,41</sup>	3.0	2.3	2.5	2.7	2.8	3.0	2.0 to 3.0
Gifts and Grants <sup>24,35,41</sup>	\$14.2M	\$6.8M <sup>36</sup>	\$3.4M	\$10.6M	\$8.7M	\$15.9M <sup>37</sup>	\$14M
Development Cost to Private Donations	38%	20% <sup>38</sup>					Less than 33%
Enrollment Headcount <sup>24</sup>	1493	1776 <sup>39</sup>	1240	3200	1919	5916	1600
Undergraduate Graduate	1327 166	1695 135	1183 41	2596 263	1750 77	3633 1618	1380 220

Notes 20-23 are on the reverse side.

<sup>27</sup> The national benchmark for *Employee Job Satisfaction* is across all industries, and represents those who reported job satisfaction as satisfied or very satisfied. Source: Society for Human Resource Management.

<sup>28</sup> The national benchmark for *Employee Retention* is based on all industries. Source: SHRM

<sup>30</sup> The national benchmark for *Customer Satisfaction* is across all industries, as a benchmark for higher education is not available. Source: ACSI (American Customer Satisfaction Index).

<sup>31</sup> Source: Council of Independent Colleges – Financial Indicators Tool, published each January.

- <sup>32</sup> The Similar Institutions benchmark for the *Composite Financial Index* is based on institutions similar to WAU in Carnegie Classification and size, and not on the following Similar Institutions Peer Group.
- <sup>33</sup> Competitors benchmark for the CFI is for Maryland the mid-east region, and not the following Competitor Peer Group, as this is the closest benchmark available.

<sup>34</sup> Source: Department of Education – Datacenter. Not all institutions' scores within each peer group are reported.

- <sup>35</sup> No public institutions were included in the Gifts and Grants benchmark, as these receive more state and federal grants than private institutions.
- <sup>36</sup> The national benchmark for *Gifts and Grants* is based on Title IV degree-granting institutions with a masters degree as the highest degree granted. n=1075
- <sup>37</sup> St. John's College is not included in the Gifts and Grants benchmark, as this institution does not receive any state or federal grants.

<sup>38</sup> Source: Supporting Advancement

National schools' benchmark is based on the Carnegie Classification of WAU, Baccalaureate-Diverse; n=389.

<sup>40</sup> Applicants that cross apply to these institutions are primarily student athletes.

<sup>41</sup> No new data available at time of print; 2010/11 data is shown.

<sup>42</sup> Strayer University and the University of Phoenix were omitted.

<sup>&</sup>lt;sup>24</sup> Source: National Center for Educational Statistics/IPEDS Data Center.

<sup>&</sup>lt;sup>25</sup> The national benchmark for **Student Retention** and for **Graduation Rates** is for 4-year institutions only. Source: NCHEMS Information Center for Higher Education Policymaking and Analysis.

<sup>&</sup>lt;sup>26</sup> For *Licensure/Certification* exams, the national pass rate for BSN programs the Nursing (NCLEX) exam is 87.7%, and for Respiratory Therapy first-time test takers (CRT Entry Level – 72.6%, Advanced – 78.7%) Source: NBRC Horizons. There is no national average pass rate for Praxis II, as this exam varies by state.

The national benchmark for *Student Satisfaction* is for 4-year private institutions only. Source: Noel Levitz. NSSE (National Survey of Student Engagement), when implemented, will provide benchmarking against national, SDA and similar institutions.

### **Benchmarking Comparison Groups:**

WAU has selected four evolving comparison groups: an aspirant group of institutions that are similar in some respects but exceed our tracked KPIs in several areas; a group of competitive peers with which we cross student applicants; a peer group automatically generated from the federal database of institutions of higher education (IPEDS) based on similar institutional characteristics including but not exclusive to Carnegie Classification, enrollment, religious governance, teaching faculty size, and endowment; and the NAD SDA colleges and universities. A single institution may be listed in more than one group.

# <sup>20</sup>Similar Institutions (Auto-Generated) Peer Comparison Group

Barton College (Wilson, NC) Catawba College (Salisbury, NC)

Central Methodist University-College of Liberal Arts &

Sciences (Fayette, MO)

Chowan University (Murfreesboro, NC)

Clarke University (Dubuque, IA)

Colby-Sawyer College (New London, NH)

College of Our Lady of the Elms (Chicopee, MA)

Cooper Union for the Advancement of Science and Art

(New York, NY)

Covenant College (Lookout Mountain, GA)

Everglades University (Boca Raton, FL)

Hastings College (Hastings, NE)

Howard Payne University (Brownwood, TX)

Huntington University (Huntington, IN)

Judson University (Elgin, IL)

La Roche College (Pittsburgh, PA)

Livingstone College (Salisbury, NC)

Mars Hill College (Mars Hill, NC)

McMurry University (Abilene, TX)

Midway College (Midway, KY)

Morris College (Sumter, SC)

Mount Mercy University (Cedar Rapids, IA)

Newberry College (Newberry, SC)

North Carolina Wesleyan College (Rocky Mount, NC)

North Central University (Minneapolis, MN)

Northwest University (Kirkland, WA)

Northwestern College (Orange City, IA)

Reinhardt University (Waleska, GA)

Schreiner University (Kerrville, TX)

Tennessee Wesleyan College (Athens, TN)

Texas Lutheran University (Seguin, TX)

Wheeling Jesuit University (Wheeling, WV)

### <sup>23</sup>Aspirant Peer Comparison Group

Andrews University (Berrien Springs, MI)

Catholic University of America (Washington DC)

Elon University (Elon, NC)

Goucher College (Baltimore, MD)

Loyola University (Baltimore, MD)

St. John's College (Annapolis, MD)

### <sup>21</sup>Competitor Peer Comparison Group

Adventist University of Health Sciences (Orlando, FL)

Andrews University (Berrien Springs, MI)

Bowie State University (Bowie, MD)<sup>40</sup>

La Sierra University (Riverside, CA)

Miami Dade College (Miami, FL)

Oakwood University (Huntsville, AL)

Pacific Union College (Angwin, CA)

Southern Adventist University (Collegedale, TN)

Southwestern Adventist University (Keene, TX)

Strayer University (Herdon, VA)

Union College (Lincoln, NE)

University of Maryland, University College (Adelphi, MD)

University of Maryland, College Park (College Park, MD) University of Maryland, Eastern Shore (Princess Anne,

MD)

University of Phoenix (Phoenix, AZ)

University of the District of Columbia (Washington, DC)

Walla Walla University (College Place, WA)

### <sup>22</sup>SDA Peer Comparison Group

Adventist University of Health Sciences (Orlando, FL)

Andrews University (Berrien Springs, MI)

Kettering College of Medical Arts (Kettering, OH)

La Sierra University (Riverside, CA)

Oakwood University (Huntsville, AL)

Pacific Union College (Angwin, CA)

Southern Adventist University (Collegedale, TN)

Southwestern Adventist University (Keene, TX)

Union College (Lincoln, NE)

Walla Walla University (College Place, WA)