Performance Evaluation meeting 3/2/2000

Meeting Notes

Last revised 4/2/2000

Introduction

Matt Filipic introduced the meeting and asked that individuals introduce themselves. He noted with pleasure the significant variation in the backgrounds and perspectives of the consultation participants. Attending were several campus presidents, numerous senior staff of campuses, faculty senate representatives, the Chancellor and regents' staff, and many individuals who have performance reporting responsibilities or experiences. It was noted that our task is complex and having many perspectives share in the planning will be quite helpful.

Our concern is to tell "the story" of higher education in Ohio and to avoid doing it badly. Many inappropriate performance reports exist, e.g. U.S. News, ranks some of our good schools as 4th tier, because they are economical or because their mandated missions encourages them to have less restrictive entrance requirements. Many existing measures focus on prestige of the institution and selectivity in admissions. Our measures need to recognize missions of school as well as the intent of the student.

We need to decide how to structure this project to keep the institutions involved and informed. Our job is both important and complicated due to multi dimensional requirements of the audiences and missions of the schools. It will require our collective efforts to do this job properly.

We reviewed the handouts. An article from the Chronicle of Higher Education suggests that we need the performance report at the state level as well as by institution. The OACC has a parallel effort underway.

A copy of the agenda for this consultation is attached to these minutes. A list of participants to the consultation is also attached.

Agenda Goal 1: Reviewing the Charge

We reviewed the charge from the governor and past performance measures such as Service Expectations. Performance Funding is a continuing effort to measure performance. For example, Success Challenge rewards campuses for meeting some goal of higher education. The IUC has done an analysis of persistence for several years.

We need to inform legislators of individual institutional performance measures. The less they are aware of individual and sector related performance measures, the more they look for standard state measures. A point was made later in the consultation that individual institution data can be positively presented as contributions to overall statewide performance. Members of the consultation clearly supported such an approach.

Initial input from the institution representatives

1) NCA has an initiative under way and will make important decisions in early April that may relate to our project.
2) Florida did a performance measure that did not tell the whole story.
3) We should coordinate our performance report with the HEI standard reports.
4) Smaller campuses may be disadvantaged in performance evaluations, e.g. they do not have institutional research departments and lack ability to provide individual instruction.
5) We can see this as an opportunity. If we do it well, it will benefit both higher education and the state.
6) Tell "the story" in concise and effective ways. Focus on the many ways higher education contributes to state needs, such as providing trained employees and expertise. Then measure the contributions.
7) The level of research in Ohio is low and that effects our economy.

8) We must be honest about the inadequate level of state support. Including national data in the report may help highlight this.
9) "The story" should show Ohio education as a statewide system not as competing institutions.
10) Put "the story" in national context, especially to demonstrate the needs of higher education at the state level.
11) From our experience on Service Expectations we learned three things:
    a) Indicators multiply to meet individual cases, then become narrative and longer narrative, until the process becomes less useable.
    b) Institutions will follow the $s
    c) What gets measured gets done.
12) We need to put $s behind the Service Expectations in order to make them work. For example, Service Expectation #7 related to quality and was not funded.
13) Use IPEDS to compare Ohio to other states.
14) Customers to consider are employers. How durable is what we learn, in today's fast changing technology? We need to learn what employers expect of students.
15) We don't capture the success our students have in business due to education, e.g. students take courses to get promotions. We should list all the ways higher education contributes to the economy, e.g., jobs, professions, research $s, service to governments, developing good citizens, developing leaders.

Summary of campus input and reaction

We've identified some competing measures. We need a social compact between the public and higher education. We have a dilemma in decentralized management and a centralized need for state knowledge of the spending patterns of institutions. Communications is the answer.

We prefer using existing data such as HEI and IPEDS. However, we may decide that we need other data. Then we will wonder about making the process routine. We do note with concern, however, that our experience is that one time data collection is not good in terms of quality of the data. Consequently, if we decide that our current data collections do not provide us with an important element of performance and we conclude that gathering the additional data is worth the cost to the institutions of providing it, we will incorporate the requirement into our routine HEI reporting .

We should recognize that not all performance measures may be appropriate for all missions. If an open access institution rates low on graduation rates, we may mistakenly argue that this is an inappropriate question. In fact all institutions do intend to graduate students. We should attempt to tell the story positively. More important than the measures is the context.

Agenda Goal 2: Creating the process

The report should be developed in a way to show continuous improvement. Not all of our objectives will be for the first year. We should try to use existing data. Measure process as well as outcome.

A campus representative indicated that available data does not include student expectations. Consider using a survey to collect this data. Student expectations at time of admission frequently change, especially in the first year.

We discussed several types of measurements:
1. Raw data, such as graduation rates.
2. Changes in data with respect to time, this disadvantages institutions who start with strong performance.
3. Comparing institutions to each other.
4. Comparing institutions to a standard.
5. Judging a value as satisfactory or unsatisfactory, slight differences in a continuous scale might be exaggerated.
6. Minimal but sufficient ratings in meeting goals.
7. Evaluative vs. non-evaluative reports.

8. Predicting values based on parameters such as test scores, affluence, residential vs. commuter students, etc. and comparing outcomes to the predictions.
9. Compare each institution to its own goals. For this we would need to identify measurable goals. Institutions have planning processes that would reveal these goals.

Some existing studies identified were:
1. Survey of Student Engagement from Indiana University. ;
2. US News, especially the value added comparison of actual to predicted graduation rates;
3. Post Secondary Opportunities, with its different approach to predicted graduation rates;
4.)The Knight Collaborative Project to gather data from alumni six years out, which will be sponsored by Peterson's.

A campus representative questioned yearly reporting. Many measures will not change yearly and become numbing to the reader. The governor has asked for annual reporting. Since we have multiple audiences, perhaps we can focus on each in separate years. Perhaps a three-year cycle for report with different focuses each year. Over time we may be able to produce a series of reports for different audiences, with particular needs, focus a report on that need and it may evolve into a statewide planning process.

The Governor and state officials in general, might benefit from being made aware of institutions' current efforts of self-analysis. A consultation member observed that unlike, K – 12, colleges and universities are in a competitive environment, within the state and beyond. We compete for students as well as such things as NSF grants. Matt indicated that the state isn't sufficiently aware of the self-assessment that goes on. Just sharing the process even without the data will be useful to state leaders.

We wondered how to introduce the report to the public. We need a strategy for presentation.

Consider reporting based on student profile rather than by institution. The student profile deals with student expectations to some extent and eliminates the report card connotation. Organize the report by the statewide system then follow by individual institutions and sectors. It was suggested that we take a systems approach and report how each institution contributes to the state need, e.g. what research contributions does each school make, regardless of its classification.

A caution was noted that if people use the report to select their college, then the report contributes to the competition.

It was suggested that we use a taxonomy for classifying institutions and the Carnegie Classification was suggested for the 4 year universities. However, this taxonomy classifies all community colleges the same. We may need different groupings for different measures e.g. selectivity is a grouping for retention. Carnegie Classification can be used for research measures. Predicted graduation rates are another way to "group" institutions. In fact, recent reports by Post Secondary Opportunities indicates that Ohio's public and private institutions generally outperform many out-of-state institutions when using predicted vs. actual graduation rates.

It was noted that the public will expect institutional comparisons from this performance report. However, articulation and student mobility are phenomena of the system. System wide graduation rates reflect mobility. A member of the consultation suggested that individual institution data can be positively presented as contributions to overall statewide performance. Members of the consultation clearly supported such an approach.

Matt shared an observation of one of the participants at the break that while the report should describe the contributions that our campuses make individually and collectively, we should also have a report that addresses our failings.

Involving the trustees

The question was posed "How to involve local boards of trustees, as the governor requested?"

One member of the consultation observed that when the governor appoints trustees, they hold the institution in trust to the people. Trustees need to report to the people. This would give the people confidence in the institutions. The governor should take the initiative and make requests of the boards, rather than individual board members. This will add to the social contract. NCA considers boards of trustees in their evaluations

An alternate opinion was that trustees vary by institution and a uniform method will not work. Each institution must decide how to engage their board. Still another idea was for OBOR to address this issue at an orientation session for board members.

Agenda Goal 3: Identify Reporting Elements

We should select elements to balance what we think we should use and what public wants. People like the *US News* report because it is simple. But we need also to be accurate. *US News* is a standard and produced by a non-biased source. Not all students pick their school from *US News* or as a result of any other comparative study; some look at what school is close by.

Data items identified by campus representatives and comments made about the data items contained in the agenda

1. Suggest: Data that shows increasing the rate of people going to college.
2. Suggest: Price data rather than cost.
3. Suggest: Average debt load of our graduates. This might mean that our fees are high or that our students are poor, or other things.
4. Suggest: Impact of research and our graduates on the Ohio economy.
5. Suggest: Data on higher education within the context of Appalachian settings.
6. Suggest: Data on use of technology. We collect data on the use of technology, but not much on distance learning.
7. Comment: Class size and student/faculty ratios were observed by one conference participant as arcane.
8. Comment: Time to declaration of a major is data that the public may want but may be misleading. Selecting a major too soon may actually prolong graduation.
9. Comment: Similarly, small classes are deceptive. Large lecture and small breakouts are better. Questions of interest to the public are not well articulated. We should tell the public what they should be concerned about. Even the governor is looking for our advice about how to report.
10. Suggest: Grade the impact that the system has on community infrastructure, e.g. teachers, professionals that come from our system.
11. Suggest: Value added in the cognitive component. There are many possible metrics, e.g., certification rates, but they vary by program. Perhaps just mention the measures that are used in various programs,
12. Comment Senate bill 6 ratios may be problematic for this report. For example, if an institution put $s into reserves (to improve the ratio), these are $s not being spent on instruction. Publishing the ratios in this report may be problematic.
13. Suggest: Scores on license exams,
14. Suggest: % of undergraduates involved in research,
15. Suggest: Student surveys, employer surveys, of what is important data to report.
16. Suggest: Survey students on their satisfaction with the process and report on a sector or statewide basis. Survey students who were in the system a few years ago.
17. Suggest: Remedial education.

Agenda Goal 4: Action Steps

We're collecting email addresses at this meeting. We will try to set up a chat room, maybe a campus could host or perhaps the Super Computer Center.

We need an interim report to the governor. It can be simply a progress report on the process, no data or conclusions are necessary.

We're forming a library of similar efforts from other states and elsewhere. Please contribute examples (both good and bad) of similar efforts from other states.

We need to organize a technical group. There is a subgroup of HEI Advisory Committee that might help, however, they have a different job of defining standard reports for the HEI system. We need 10 – 12 people to meet with us monthly or so. Representatives should email the names of candidates, including their capabilities to Matt or Rob Sheehan. We need people who have done this before on a campus, who can translate numbers into policy, senior staff to ask why as well as how and also have the necessary technical skills. We will call the first meeting of the technical group in a month. The technical group needs a marketing representative to look at presentation of data. Nominations for this group should be submitted in a week or two.

We would like to have a draft report by late summer or early fall because the governor asked for an annual report in Fall of 1999. We recognize the learning curve associated with developing such a report and that the reports may evolve over the years.

The starting point is "the story" we have to tell. Each institution makes different contributions to "the story". "The story" is our opportunity. It should relate the questions we have been raising in this meeting, Ohio is not well educated, particularly in low-income areas. It should not be so positive that it says we don't need help. A broader group than the technical group should craft "the story".

Matrix of Measure vs. Audience

We discussed the matrix of measure vs. audience. We noted that the starting point for developing any list of performance measures is to identify potential target audiences for performance information and the specific information needs of each audience (these may overlap). To assist us, Consultation participants were encouraged to fill out this matrix and have others on their campus complete the matrix.
It was suggested that we add taxpayers or parents as audiences to the matrix.

OBES data

We think we will get an agreement to access employment data in the state and on a regional basis.

What's next

Independent institutions have not decided how to proceed on this issue. If we go our separate ways, we should maintain a dialog.

We want the Governor to be in the loop in developing the process and approve what we're doing.

This group agreed that they would like to meet again in several months to make mid course evaluation of this project, rather than waiting until a draft report is complete.

Please nominate members for the technical representatives in 1 – 2 weeks. Please include the title and background of nominees.

We intend to Update the matrix of matrix of measure vs. audience based upon input received by consultation representatives.