

# Key Performance Indicators – From Scorecard to Dashboards

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*Office of Educational Effectiveness  
and  
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(EEIR)*

California Lutheran  
UNIVERSITY

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# California Lutheran University



California Lutheran  
UNIVERSITY

# Overview of Presentation

- AiR Forum Dashboard Workshops
- Original KPI Scorecard
- Creation of KPI Dashboards
- Dashboard Ownership Transition
- VP and Board Reaction
- Creation of KPI Inventory
- Dashboards in Action
- Moving Forward

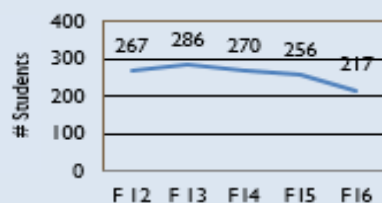
# AiR Forum Dashboard Workshops

- AiR Intro and Advanced Dashboard Workshops
  - Craig Abbey, Long Beach AiR Forum
- Student Profiles Dashboards
  - Program Review
  - Student Success Report

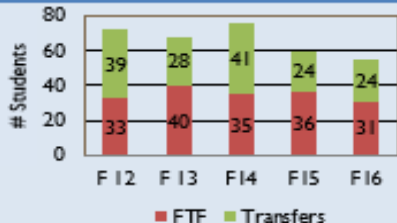
# California Lutheran University

## Traditional Undergraduate Program (TUG)- Communications

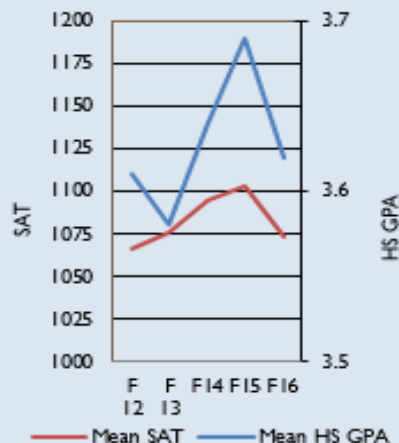
### Major Trends



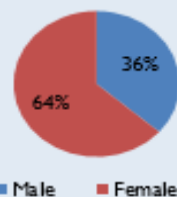
### New Student Trends



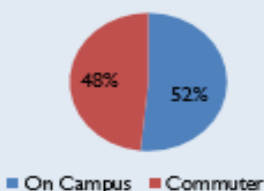
### Freshmen Quality Trends



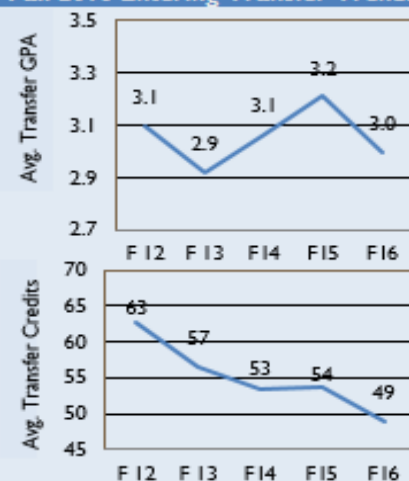
### Fall 2016 Gender



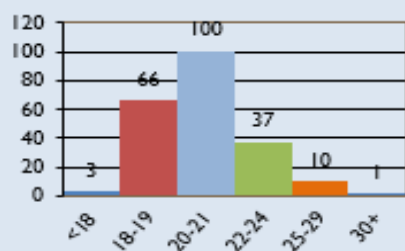
### Residential Status



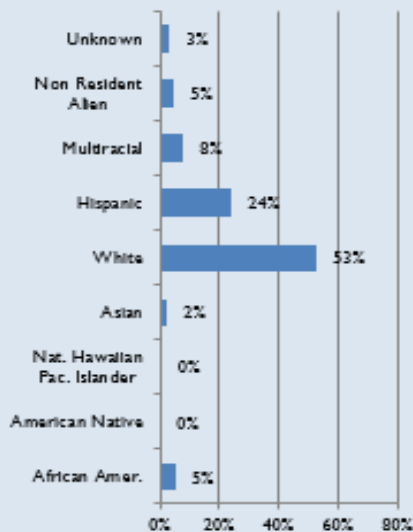
### Fall 2016 Entering Transfer Trends



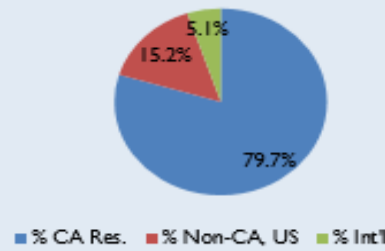
### Fall 2016 Age Distribution



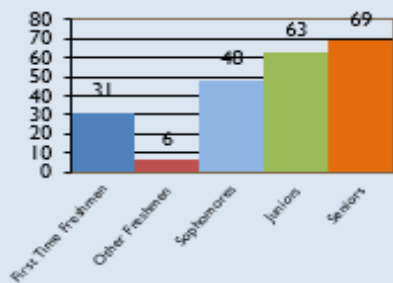
### Fall 2016 Race/Ethnicity



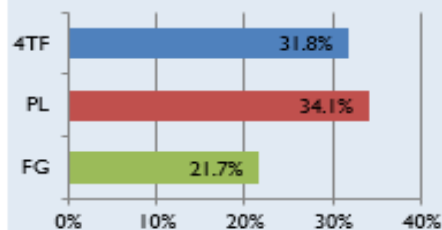
### Fall 2016 Geographic Origin



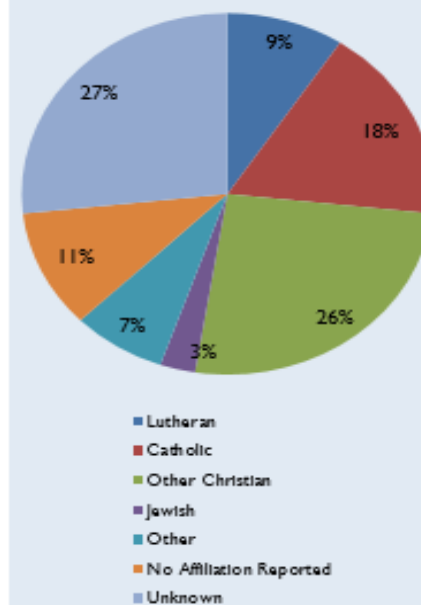
### Fall 2016 Class Distribution



### Fall 2016 Student Characteristics



### Fall 2016 Religious Affiliation



## Demographics: All Students

Cal Lutheran has seen a six percent increase in overall headcount and 12 percent increase in student credit units over the past five years.

Of the students enrolled at Cal Lutheran in Fall 2014, 57 percent were female and 43 percent male. This is a consistent data trend.

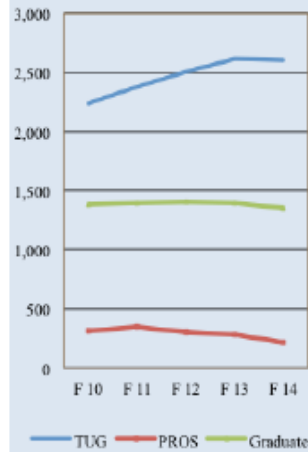
Underrepresented race or ethnicity groups increased four percent from 33 percent in 2010. The largest increase was in the Hispanic population. The foreign national population of 11 percent has had an overall increase of four percent since 2010.

The Fall 2014 self-reported religions affiliations have seen the following changes: A three percent decrease in Lutherans and a one percentage increase in Other, such as Jewish, Hindu, Buddhist, and Muslim.

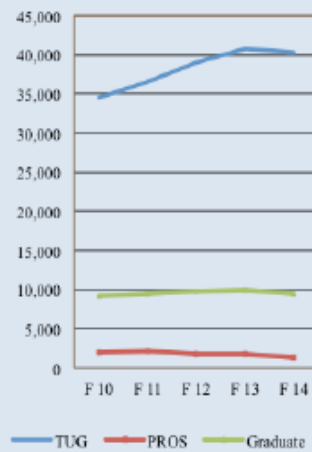
86 percent of Cal Lutheran students attended full-time in Fall 2014. This represents a three percent increase in full-time students over five years.

## All Students

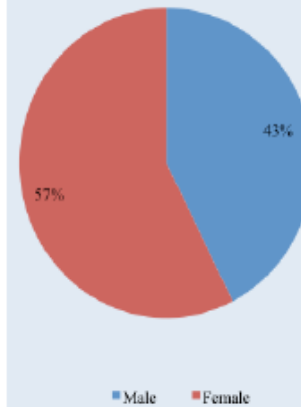
Students by Level Trends



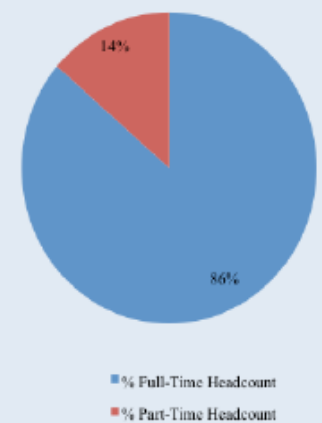
Credits by Level Trends



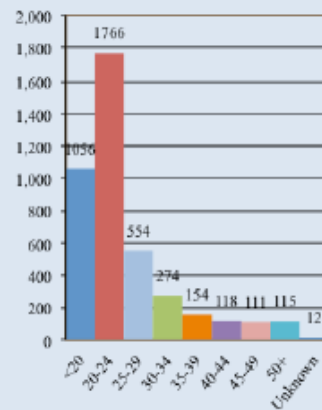
Fall 2014 Gender



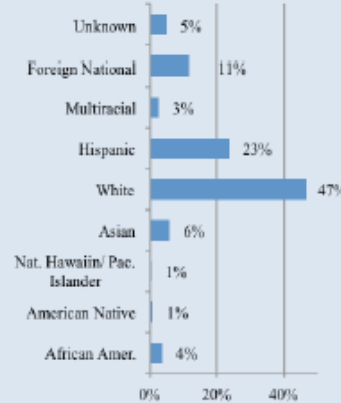
Fall 2014 Enrollment Status



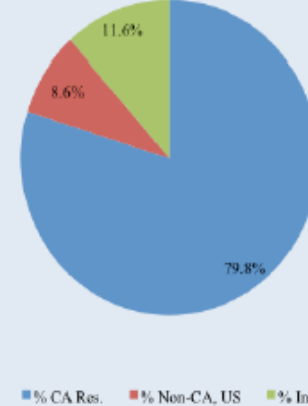
Fall 2014 Age Distribution



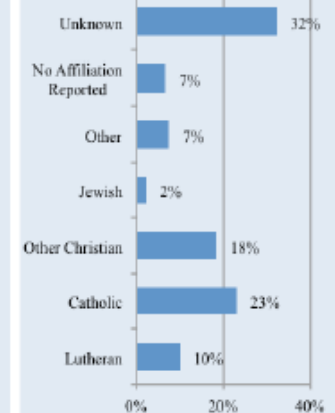
Fall 2014 Race/Ethnicity



Fall 2014 Geographic Origin



Fall 2014 Religious Affiliation



# Original KPI Scorecard

CLU DASHBOARD						
Key Performance Indicator Dashboard		10-11	11-12	12-13	13-14 Target	2017 Target (per CLU 2017 Strategic Plan)
Fall Enrollment (FTE - IPEDS Formula)	Undergraduate	2,207	2,344	2,472	2,492	2,562
	ADEP	195	213	197	202	279
	Graduate	1,079	1,074	1,123	1,125	1,352
	<b>Total</b>	<b>3,481</b>	<b>3,631</b>	<b>3,792</b>	<b>3,819</b>	<b>4,193</b>
Fall Headcount (Unduplicated)	Undergraduate	2,237	2,373	2,504	2,525	2,600
	ADEP	308	340	300	315	450
	Graduate	1,386	1,390	1,401	1,369	1,750
	<b>Total</b>	<b>3,931</b>	<b>4,103</b>	<b>4,205</b>	<b>4,209</b>	<b>4,800</b>
Cumulative Student Credit Units	Undergraduate (Summer)	1,180	1,466	1,489	1,600	?
	Undergraduate (Academic Year)	68,299	71,263	76,205	75,750	77,972
	ADEP	7,053	7,595	6,943	7,224	10,135
	Graduate	27,565	28,596	31,212	29,951	35,028
	<b>Total</b>	<b>104,097</b>	<b>108,920</b>	<b>115,849</b>	<b>114,525</b>	<b>?</b>
2nd Year Retention	CLU	83%	85%	83%	83%	86%
	First-time Freshmen Undergraduate <i>Comparison</i>	87%	87%	<i>Data Available Sept '13</i>		
	<i>Gap</i>	4%	2%			
Year-to-Year Persistence	Traditional Undergraduate (TUG)	88%	89%		89%	?
	ADEP	85%	80%	<i>Data Available May '13</i>	80%	?
	Graduate	85%	89%		89%	?
Advancement	Cash	\$ 8,126,000	\$ 9,689,000		?	?
	Cash & Pledges <i>(includes planned gifts)</i>	\$ 17,507,000	\$ 16,170,000	<i>Data Available Aug '13</i>	?	?
	Science/Gallegly Capital Campaign Initiatives (Cash & Pledges)				\$7M	\$35M



# Creation of KPI Dashboard Prototype

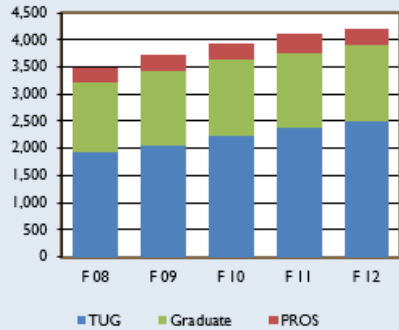
- Different formats were tested and brought to the Provost for review:
  - 4 Across
  - 3 Across
  - Color scheme
  - Arrows
  - Size

# Dashboards – 4 Across

## Enrollment and Student Outcomes

1

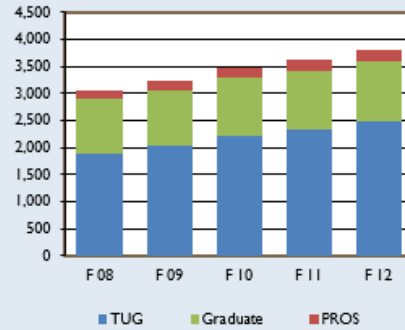
Student Headcount



[Click to see data definition](#)

2

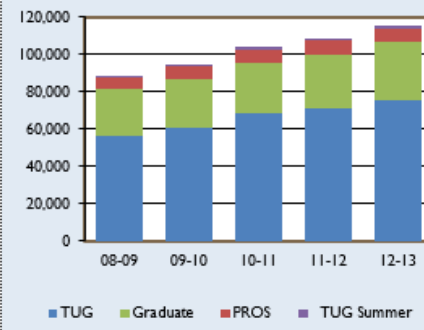
Student FTE



[Click to see data definition](#)

3

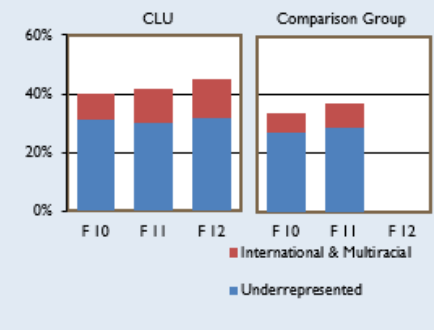
Student Credit Units



[Click to see data definition](#)

4

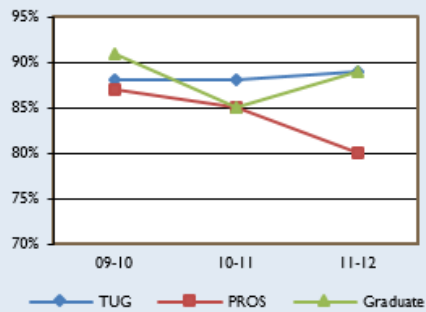
Fall Student Diversity



[Click to see data definition](#)

5

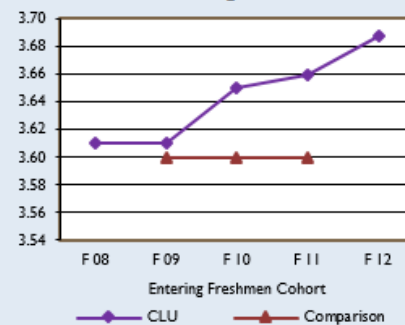
Year to Year Persistence



[Click to see data definition](#)

6

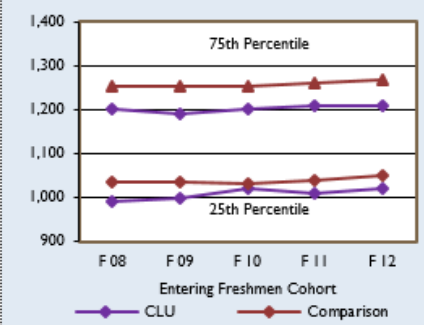
FTF Entering HS GPA



[Click to see data definition](#)

7

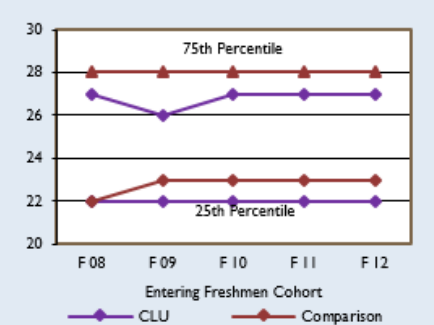
FTF SAT Scores



[Click to see data definition](#)

8

FTF ACT Scores



[Click to see data definition](#)

# Creation of KPI Dashboard Prototype

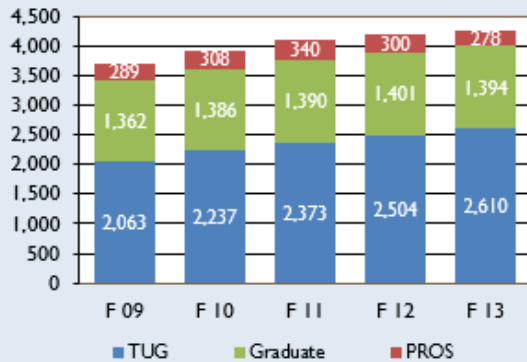
- Different formats were tested and brought to the Provost for review:
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  - Color scheme
  - Arrows
  - Size

# Dashboards – 3 Across

## Enrollment and Student Outcomes

1

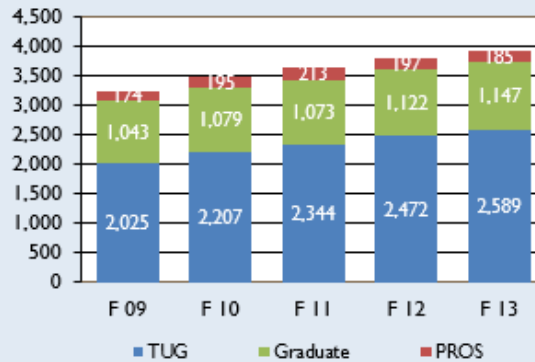
### Fall Headcount



Unduplicated

2

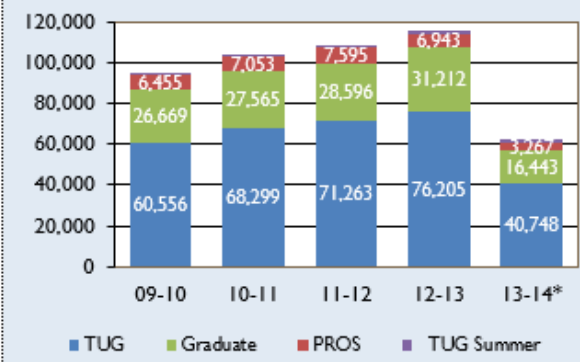
### Fall Enrollment



FTE - IPEDS Formula

3

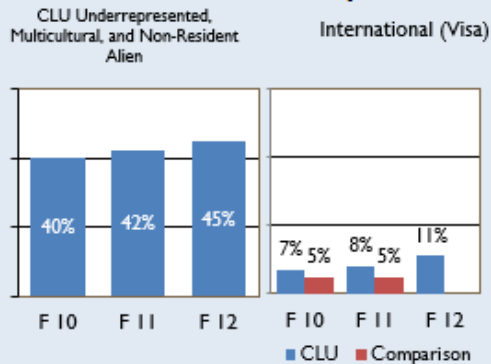
### Cumulative Student Credit Units



\*Data includes Summer 2013 and Fall 2013 only

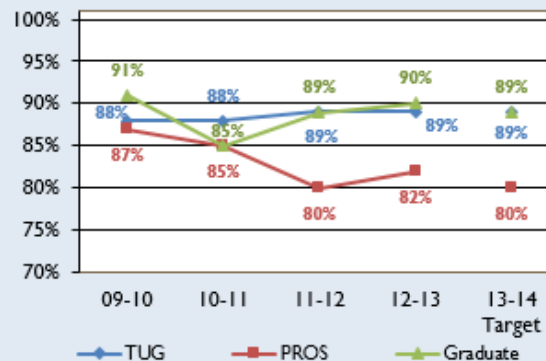
4

### Fall Student Diversity



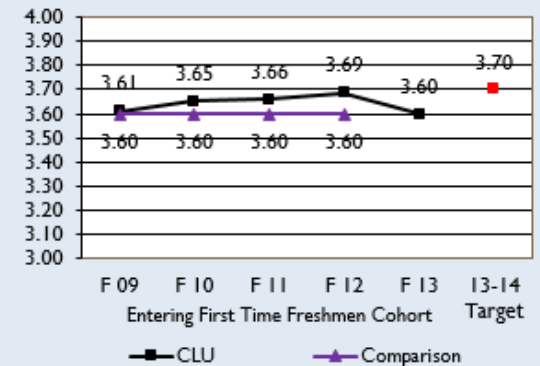
5

### Year to Year Persistence



6

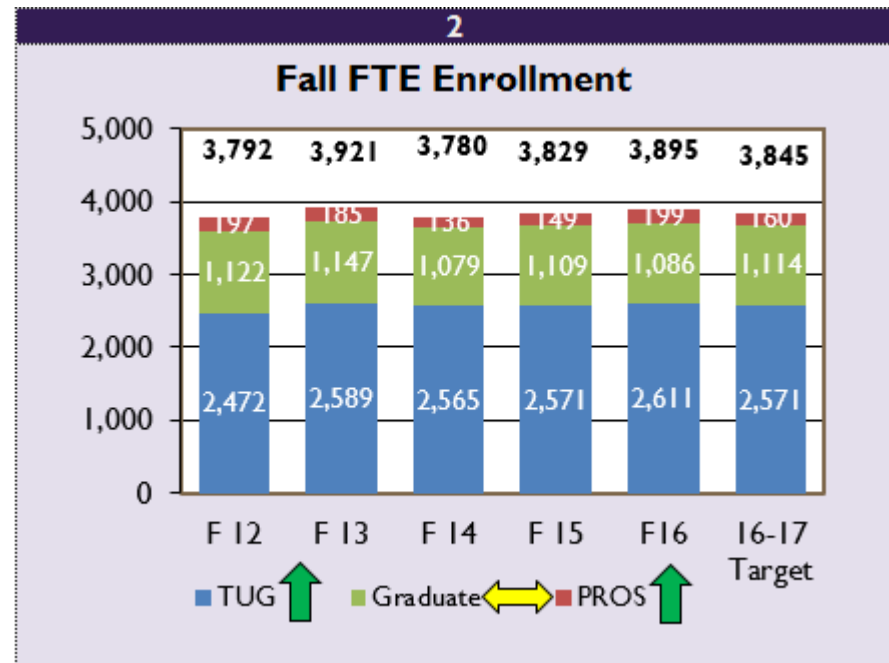
### Entering High School GPA



# Creation of KPI Dashboard Prototype

- Different formats were tested and brought to the Provost for review:

- 4 Across
- 3 Across
- Color scheme
- Arrows
- Size



# Dashboard Ownership Transition

- Originally housed in Administration and Finance Division
  - EEIR Provided majority of data for scorecard
- Discussion with Provost
- Present dashboards to President
  - Immediately approved overall dashboard
- Overall dashboard presented at next Board meeting
- Ensuring data literacy

# VP and Board Reaction

*Well received!*

- EEIR created individual Board committee dashboard prototypes
- EEIR work collaboratively with VPs to discuss:
  - Committee Dashboards
  - Individual data points
  - Methodology
- Creation of KPI Inventory

# Creation of KPI Inventory

- EEIR met with each VP to discuss their committee dashboards.
- A set of KPI inventories were developed.

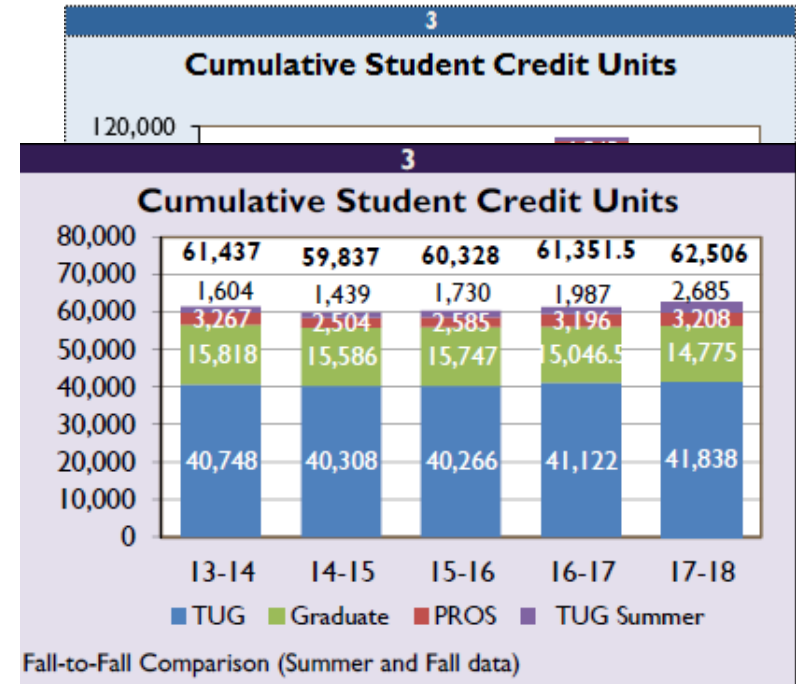
## Overall Dashboard

Chart #	Chart Title	Data point produced by	Person to Contact	Data Point Date available	Comparison Data	Comparison Data Date Available	Goal produced by	Goal Date available	Chart Last Updated Date
1	Fall Headcount	EEIR	Cathy and Andrea	2 weeks after census^	-	-	Enrollment Management	January	9/28/2016
2	Fall FTE	EEIR	Cathy and Andrea	2 weeks after census^	-	-	Enrollment Management	January	9/28/2016
3	Cumulative SCUs	EEIR	Cathy and Andrea	2 weeks after census^	-	-	Enrollment Management	January*	2/14/2017
4	Fall Student Diversity	EEIR	Cathy and Andrea	2 weeks after census^	-	-	Enrollment Management	January	9/28/2016
5	Fall Student Diversity (Int'l)	EEIR	Cathy and Andrea	2 weeks after census^	IPEDS	End of October	Enrollment Management	January	10/3/2016
6	Year to Year Persistence	EEIR	Cathy and Andrea	3rd week in April	-	-	Angela Naginey/EMM	October	10/4/2016
7	Entering HS GPA	EEIR	Cathy and Andrea	2 weeks after census^	US News	October	Enrollment Management	January	9/29/2016
8	FTF SAT Scores	EEIR	Cathy and Andrea	2 weeks after census^	IPEDS	End of October	Enrollment Management	January	10/6/2016
9	FTF ACT Scores	EEIR	Cathy and Andrea	2 weeks after census^	IPEDS	End of October	Enrollment Management	January	10/23/2016
10	FTF 2nd Year Retention	EEIR	Cathy and Andrea	2 weeks after census^	IPEDS	End of October	Angela Naginey	October	10/10/2016
11	Experiential Learning 1	EEIR	Grady Hanrahan	Summer 2016	-	-	Grady Hanrahan	-	10/20/2016
12	Experiential Learning 2	EEIR	Grady Hanrahan	Summer 2016	-	-	Grady Hanrahan	-	10/20/2016
13	Advancement	Advancement	Kristine Calara	^6 weeks before BoR	-	-	Advancement	^6 weeks before BoR	9/23/2016
14	Expandable Resources to Debt	Administration & Finance	Barbara Rex	Spring	-	-	Administration & Finance	October	9/27/2016
15	Net Income Ratio	Administration & Finance	Tom Marsh	September	-	-	Administration & Finance	October	9/27/2016
16	Primary Reserve Ratio	Administration & Finance	Tom Marsh	September	-	-	Administration & Finance	October	9/27/2016
17	Viability Ratio	Administration & Finance	Tom Marsh	September	-	-	Administration & Finance	October	9/27/2016
18	Adjunct Pay	Academic Affairs	Terry/Karissa	October	-	-	Academic Affairs	Academic Affairs	9/29/2016



# Dashboards in Action

- Easier to view data trends
- Made dashboards available to the Board
- Frequency of dashboard distribution
- Student Credit Units – “apples to apples”
- Goals
- Set up templates over summer



# Moving Forward

- Utilizing the inventory
- Develop frozen data files specific to KPI data (data warehouse)
- Internal EEIR document with step by step processes
- New Strategic Plan
- Move toward transparency
- Move toward dynamic dashboard software

# Questions?

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