

Task Force: Student Success

Committee Name: Undergraduate Student Success Peer Benchmarking

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Committee Members and Titles: Kim Black, Director of Assessment; Burkhard Englert, Dean, College of Natural and Health Sciences; Karen Raymond, Data Scientist; Nancy Sileo, Associate Provost

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### Report Format

Summary of Recommendations – Provide your committee’s recommendations in a numbered list in the space below.

1. UNC should adopt the following universities as peer institutions for benchmarking undergraduate student success outcomes.

Bloomsburg University of Pennsylvania	Louisiana Tech University	University of Tennessee Chattanooga
Bowling Green	Saginaw Valley State University	University of Massachusetts Lowell
Bridgewater State University	Sonoma State University	University of Central Missouri
Coastal Carolina University	Southeast Missouri State University	University of Massachusetts Dartmouth
Idaho State University	Southern Illinois University Edwardsville	University of Wisconsin Whitewater
Indiana University of Pennsylvania, Main Campus	University of Southern Indiana	

2. UNC should adopt the following institutions as aspirants for benchmarking undergraduate student success outcomes. Note that these institutions emerged as peers in our analysis and were selected as aspirants because of the student success outcomes they have achieved. While Ball State and SUNY Plattsburgh are performing at or below UNC on equity gaps, based on our recommended performance targets (see number 4 below), all three institutions meet the 4- and 6-year graduation goals as well as the fall-to-fall retention rates.

Ball State University	SUNY Binghamton	SUNY Plattsburgh
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3. In addition to using the peer and aspirant institutions for benchmarking undergraduate student success outcomes, we recommend that UNC also establish a third comparison group consisting of regional four-year competitor institutions.
4. UNC should adopt the following undergraduate student success outcome performance targets, to be achieved by 2025.
  - 40% four-year graduation rates for new first-time, full-time students
  - 60% six-year graduation rates for new first-time, full-time students
  - 80% fall-to-fall first year retention for new first-time, full-time students
  - Eliminate the equity gap for Pell and underrepresented minority students

5. UNC should establish an institutional strategic plan for achieving these goals that is aligned to resource allocation and external funding priorities.
6. UNC should conduct an analysis of undergraduate student success outcomes by program and college relative to the 2025 performance goals.
7. Individual academic programs and colleges should establish goals and strategies for supporting the institutional undergraduate student success outcomes, with a focus on time to degree (including attention to equity gaps). In addition, the university should adopt accountability expectations for improvement where needed.
8. By fall 2019, UNC should make available publicly accessible dashboards on its website for tracking performance on the 2025 undergraduate student success goals at the program, college, and institutional levels.
9. UNC should establish a dedicated unit that is formally responsible for monitoring and tracking progress towards the 2025 undergraduate student success goals and impact analyses that support program, college, and institutional improvement efforts.

#### Detailed Discussion of Recommendations –

1. In what ways do these recommendations align with the guiding principles for all task force committees?

Our charge was to develop recommendations for peer and aspirant institutions and undergraduate student success outcome performance targets. As such, some of the guiding principles were not applicable to our work. Nonetheless, we relied on the guiding principles in the following ways:

- We used guiding principle 1 (i.e., UNC’s mission to educate first generation and other underrepresented students) to make decisions about variables to be included in our analysis and to apply statistical and qualitative information in our selection process. (see Appendix A for a discussion of our methodology).
- We used guiding principle 4 regarding performance metrics as the basis for deciding which outcomes to include in our identification of aspirant institutions. We were not able to use post-degree placement because there is not a reliable source of this information for all institutions.
- We used guiding principle 5 regarding transparency to inform our recommendations for developing publicly accessible dashboards and establishing a dedicated unit responsible for monitoring, analyzing, reporting, and using performance data.
- Guiding principle 6 also influenced the variables we used for selecting the peer and aspirant institutions. We recognize that individual programs, colleges, or other university functions may have different peer institutions. Since our charge was focused on undergraduate student success outcomes, we chose to focus our analysis at the institutional level.

2. What resources would be saved or required to implement and sustain these recommendations?

Implementation of these recommendations would likely not produce any direct cost savings; however, if UNC were to make progress toward achieving the performance outcome targets, increased student retention and persistence would add tuition revenue. Additional resource implications are as follows:

- The Strategic Enrollment Management plan is intended to be a degree completion strategy from recruitment to graduation. The work that is underway with Huron Consulting Group is a solid first step toward further developing planning at the institution, college, and program levels. The

plans for undergraduate student success that emerge will likely require redirecting current resources to new priorities, eliminating or reducing some services or programs, and potentially presenting opportunities for increased external funding.

- The technology for producing performance dashboards already exists at UNC. No new resources would be required; however, to achieve a fall 2019 target, it may be necessary to prioritize workload of staff responsible for creating, publishing, and maintaining these dashboards.
- Establishing a dedicated unit to monitor, track progress, and assist with performance goal setting and analysis could be accomplished by reorganizing the Office of Assessment and using existing FTE to staff the unit. This unit could perform services currently provided through a contract with EAB in addition to meeting other important institutional needs for impact analysis, target setting, and predictive modelling. Significant cost savings could be achieved by cancelling some aspects of the EAB contract (specifically the APS platform and several yearly subscriptions to EAB publications and resources).

3. How would implementation of these recommendations improve existing programs and services?

The institutions that emerged as peers are solid but not exceptional institutions. Among this group of peers, UNC ranks near the bottom for first-year retention (including one institution that is open-enrollment). UNC is in the bottom half in terms of 6-year graduation rates and in the middle of the pack for the 4-year graduation rate (see appendix for comparative data). UNC currently does not have well-defined performance metrics for planning, resource allocation, and decision making related to undergraduate student success. Many people are working hard, and significant resources have been invested, but our performance on student outcomes remains stagnant at best. Adopting these outcome targets, developing strategic goals at the program, college, and institutional levels, and systematically using peer benchmarking data for evaluating programs and services will help UNC do more rowing and less drifting.

4. What services or programs could be phased out because they would no longer be needed or because implementation of the recommendations would represent a more effective and efficient use of university resources?

It is likely that a strategic plan would identify these opportunities; however, this is beyond the scope of our committee.

5. Who would be primarily responsible for implementing these recommendations and have those individuals/units been consulted?

The president, provost, and campus leaders would be responsible for initiating and implementing a strategic plan for undergraduate student success. College deans and program leaders would be responsible for setting college and program goals and developing and implementing strategies for achieving those goals. A reconfigured Office of Assessment would be responsible for monitoring and tracking performance against these institutional benchmarks. This unit would work closely with Institutional Analysis and Reporting Services (IRAS), the Provost, College Deans, and the AVP for Student Academic Success to develop dashboards and other reports for tracking progress and for conducting impact analyses and other statistical support services.

## Action Plan

Recommendation 1: Adopt the recommended set of peer institutions.		
Performance Metric(s): Institutions are adopted.		
Action	Responsibility	Short or Long Term
Campus leadership approves recommendation	Provost and President	Short
Recommendation 2: Adopt the recommended set of aspirant institutions.		
Performance Metric(s): Institutions are adopted.		
Action	Responsibility	Short or Long Term
Campus leadership approves recommendation.	Provost and President	Short
Recommendation 3: Adopt a third comparison group consisting of regional four-year competitor institutions.		
Performance Metric(s): Third comparison group adopted.		
Action	Responsibility	Short or Long Term
Campus leadership approves recommendation	Provost	Short
Recommendation 4: Adopt the recommended undergraduate student success outcome performance targets.		
Performance Metric(s): Performance targets adopted.		
Action	Responsibility	Short or Long Term
Provost reviews and approves targets.	Provost	Short
President reviews and approves targets.	President	Short
Recommendation 5: Establish an institutional strategic plan for achieving undergraduate student success outcomes.		
Performance Metric(s): Plan developed and implemented		
Action	Responsibility	Short or Long Term
President convenes planning committee.	President	Short (Spring 2019)
Committee convenes with AVP for Student Academic Success and Associate Provost for Undergraduate Education as co-chairs.	AVP Student Academic Success and AP for UG Education	Short (Spring 2019)
Committee reviews task force recommendations, Huron recommendations, and other relevant information.	Committee	Short (Spring 2019)
Plan developed and presented to President.	Committee	Short (Spring 2019)
Plan shared with campus to begin implementation.	President	Short (Spring 2019)

Recommendation 6: Conduct analysis of undergraduate student success outcomes by program and college		
Performance Metric(s): Reports ready for dissemination to academic programs and colleges		
Action	Responsibility	Short or Long Term
Collect and analyze institutional data	Institutional Effectiveness (IE)	Short (Summer 2019)
Develop reports for colleges that include analysis	Institutional Effectiveness	Short (Summer 2019)
Share reports with colleges and academic programs	Institutional Effectiveness	Short (Summer 2019)
Recommendation 7: Individual academic programs and each college establish goals and strategies for UG student success outcomes		
Performance Metric(s): Specific strategies developed and implemented		
Action	Responsibility	Short or Long Term
College leadership review data to develop college-wide priorities	Deans, chairs, directors	Long (Fall 2019)
Academic programs develop program-specific strategies	Chairs, directors	Long (Fall 2019)
Implement strategies that don't require new resources	College leadership	Long (Spring 2020)
Use FY 21 budget process to align strategies to budget	College leadership	Long (Spring 2020)
Recommendation 8: Make public dashboards available on the UNC website		
Performance Metric(s): Dashboards are posted and available to the campus and other stakeholders		
Action	Responsibility	Short or Long Term
Identify which dashboards will be developed	IRAS, Office of Assessment, Student Academic Success	Short (Spring 2019)
Create and test dashboards for data integrity and functionality	IRAS and Office of Assessment	Short (Summer 2019)
Determine where dashboards will "live" on website	IRAS, Office of Assessment, Student Academic Success	Short (Summer 2019)
Post dashboards	IRAS	Long (Fall 2019)
Recommendation 9: Establish Office of Institutional Effectiveness		
Performance Metric(s): Office established, including staffing		
Action	Responsibility	Short or Long Term
Reorganize Office of Assessment with responsibilities for performance monitoring and evaluation and research support for impact analyses	Provost, Director of Assessment	Short (Spring 2019)
Reassign FTE and/or hire to staff office	Provost, Director of Assessment	Short (Spring 2019)

## Appendix A: Peer Benchmarking Methodology

At the request of President Andy Feinstein, the Peer Benchmarking Task Force convened November 5, 2018. The charge for the committee was to develop a recommendation for peer and aspirant institutions for undergraduate student success and to recommend performance targets for retention, 4- and 6-year graduation rates, and equity gaps. While best practices suggest that peer benchmarking typically takes place over a more extended period of time that includes an iterative process involving multiple stakeholders, the accelerated timeline required the committee to make some decisions that would, under different circumstances, involve broader input. To ensure a robust process, the committee pursued its charge by adopting the methodology described below.

### **1: Review of past practice at UNC and best practice literature**

We gathered and reviewed documents and also consulted with other institutions to determine a framework for evaluating and selecting peer institutions (see reference list at the end of this document). Some of the best practices we adopted include the following:

- Employ both quantitative and qualitative methods for determining the final set of institutions.
- Be clear about how the institution will use the peer institutions for benchmarking. Different purposes are likely to produce different peer lists.
- Determine the descriptive criteria to be used for including/excluding institutions.
- Use the IPEDS Data Center as a source for institutional comparative data.
- Include past or current institutional peers when collecting the comparative data.
- Consider qualitative factors when making the final determination.

One practice we were not able to employ due to limited time involved using the IPEDS data for all institutions and then performing cluster analyses to identify institutions that are most like/unlike our own. We recommend that this process be used at a future date.

### **2: Determine the purpose of the list we were charged to produce**

This list is intended to provide peer and aspirant institutions for benchmarking UNC on undergraduate student success outcomes: specifically, fall-to-fall retention of first-time, full-time undergraduates, 4- and 6-year graduation rates, and equity gaps.

### **3: Select institutions to be included in the comparison data analysis**

UNC has long relied on a set of 27 peer institutions identified through NCHEMS. Since we did not have time to include all four-year public institutions and perform a cluster analysis, we opted to use this list as our starting point. President Feinstein also recommended that UNC review the list of peers generated by the Education Trust's College Results Online platform. The Education Trust identified 15 institutions, only one of which also appears on the NCHEMS 27. We combined the NCHEMS and Education Trust peers for a total of 41 institutions as our starting point.

### **4: Determine the selection criteria to be included in the analysis**

We heavily relied on the recommendations we found in the literature for determining selection criteria. After considering an exhaustive set of possible criteria, we narrowed our list to the following:

### Descriptive Variables

- Institutional size
- Total enrollment for latest fall semester
- Tuition and fees
- Average net price for low income students
- Total operational revenues
- Degrees awarded
- Number of faculty
- Instructional costs as percent of expenditures
- Percent of degrees by field (business, education, fine arts, health sciences, humanities, physical sciences, social sciences)
- Student demographics (FG, URM, M/F, Age)
- Participation in federal aid programs
- Percent of UG receiving grant aid
- Percent of UG receiving Pell grants
- Selectivity
- Carnegie classifications

### Outcome Variables

- Undergraduate fall-to-fall for retention rates first-time, full-time students
- 4- and 6-year graduation rates
- 6-year graduation rates for Pell- and non-Pell eligible students
- 6-year graduation rates for underrepresented and non-underrepresented students

### **5: Collect and analyze comparison data**

One member of our committee, Dr. Karen Raymond, collected and analyzed comparison data for all of the institutions we included in our initial review. We started with the NCHEMS 27. Results for all numerical variables were converted to z-scores to facilitate the analysis. After reviewing the results, we used a qualitative approach to identify three descriptive variables to produce a list of institutions that most closely resemble UNC. These included institutional size, Carnegie classification, and the percent of underrepresented minority students enrolled. This produced a list of 8 NCHEMS peers:

- Ball State University
- Bowling Green State University – Main Campus
- Idaho State University
- Indiana University of Pennsylvania – Main Campus
- Louisiana Tech University
- SUNY at Binghamton
- University of Louisiana at Lafayette
- University of Massachusetts – Lowell

The Education Trust identified 15 institutions with similar outcomes to UNC's current student success outcomes. We should note that the majority of these institutions are Master's level institutions; however, based on President Feinstein's past experience with Education Trust and his recommendation that we consider it, we elected to retain those institutions. We believe this is appropriate because of the focus of our charge on undergraduate student success outcomes.

We used the IPEDS data center to download the comparison data for the Education Trust institutions and then ran correlations between those data points and the student outcomes we identified for all 23 institutions (including UNC). This analysis resulted in identifying five variables that were significantly related to four-year graduation rates:

- % Admitted
- Average high school GPA for first-time students
- Estimated ACT/SAT test scores
- % of students age 25 or older
- Average student related expenses per FTE

Three additional variables were identified as significantly correlated to transfer-out rates:

- % of underrepresents minority students enrolled
- % of full-time faculty
- Student/faculty ratio

We elected to drop the ACT/SAT test scores and student-related expenses from our analysis. We dropped ACT/SAT scores because of concerns about whether there is sufficient data on these provided for each institution to allow for an accurate comparison. We dropped student-related expenses because of the significant variability in result of the variability in how different institutions categorize expenses. For example, some include athletics, and some don't.

## **6: Determine list of peer institutions**

First, we eliminated one institution from the Education Trust list, University of Wisconsin Stevens Point, because of its Carnegie Classification as a Masters Small institution. Besides UNC, only two other Education Trust institutions are Research High. All of the remaining institutions are Masters Large.

To decide whether to retain or drop the remaining 22 institutions, we looked at the six variables that were identified as significantly correlated to student success outcomes. Considering UNC's scores on these variables, we set a cut-scores for each variable as follows:

- % Admitted – include institutions that have a 75% or higher admit rate
- Average high school GPA for first-time, full-time students – include institutions whose highest average high school GPA was below 3.4
- % of students age 25 or older – include institutions with 10% or less of the student undergraduate population 25 or older
- % of underrepresents minority students enrolled – include institutions with 15% or more underrepresented minority students
- % of full-time faculty – include institutions with 75% or fewer full-time faculty
- Student/faculty ratio – include institutions with a student/faculty ratio of 20 or lower

In order to be retained as a peer institution, an institution had to appear in at least three of the six groups based on the cut-scores outlined above. This resulted in a list of 20 institutions.

- Ball State University
- Bloomsburg University of Pennsylvania
- Bowling Green State University
- Bridgewater State University
- Coastal Carolina University
- Idaho State University
- Indiana University of Pennsylvania, Main Campus
- Louisiana Tech University
- Saginaw Valley State University
- Sonoma State University
- Southeast Missouri State University
- Southern Illinois University Edwardsville
- SUNY Binghamton
- SUNY Plattsburgh
- University of Southern Indiana
- University of Tennessee Chattanooga
- University of Massachusetts Lowell
- University of Central Missouri
- University of Massachusetts Dartmouth
- University of Wisconsin Whitewater

### **7: Determine aspirant institutions**

For the last step in our process, we used the student success outcome retention and graduation rate variables and applied these to the 20 institutions we identified. We relied on public remarks from President Feinstein to set the student success performance goals as follows:

1. First-time, full-time fall-to-fall retention – 80%
2. 4-year graduation rates – 40%
3. 6-year graduation rates – 60%

To be considered an aspirant school, an institution needed to have achieved all three rates at least once within the last five years. Using this cut-point, we identified three institutions that met these criteria:

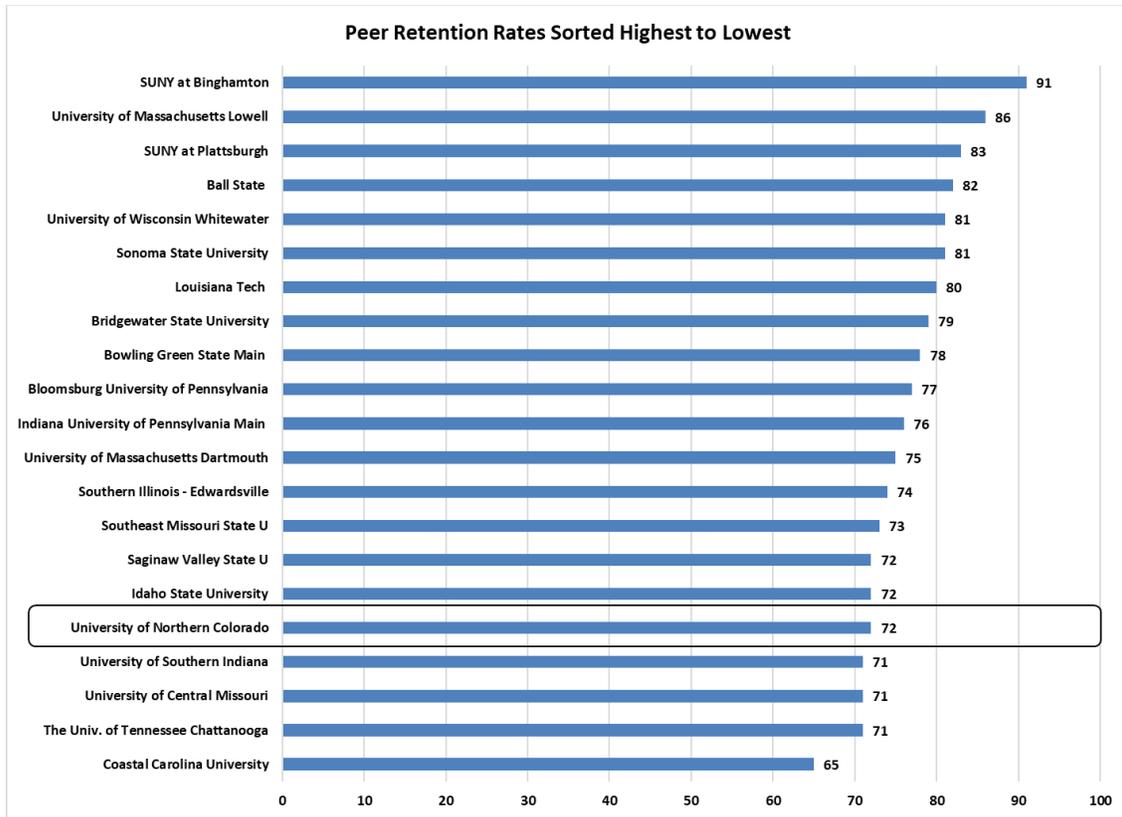
- Ball State University
- SUNY Binghamton
- SUNY Plattsburgh

Lastly, because we are recommending targets for equity gaps, we also assessed the peer and aspirant schools against equity outcomes. It should be noted that Ball State and SUNY Plattsburgh are performing at or below UNC on equity gaps.

Appendix B: Peer Comparison Data

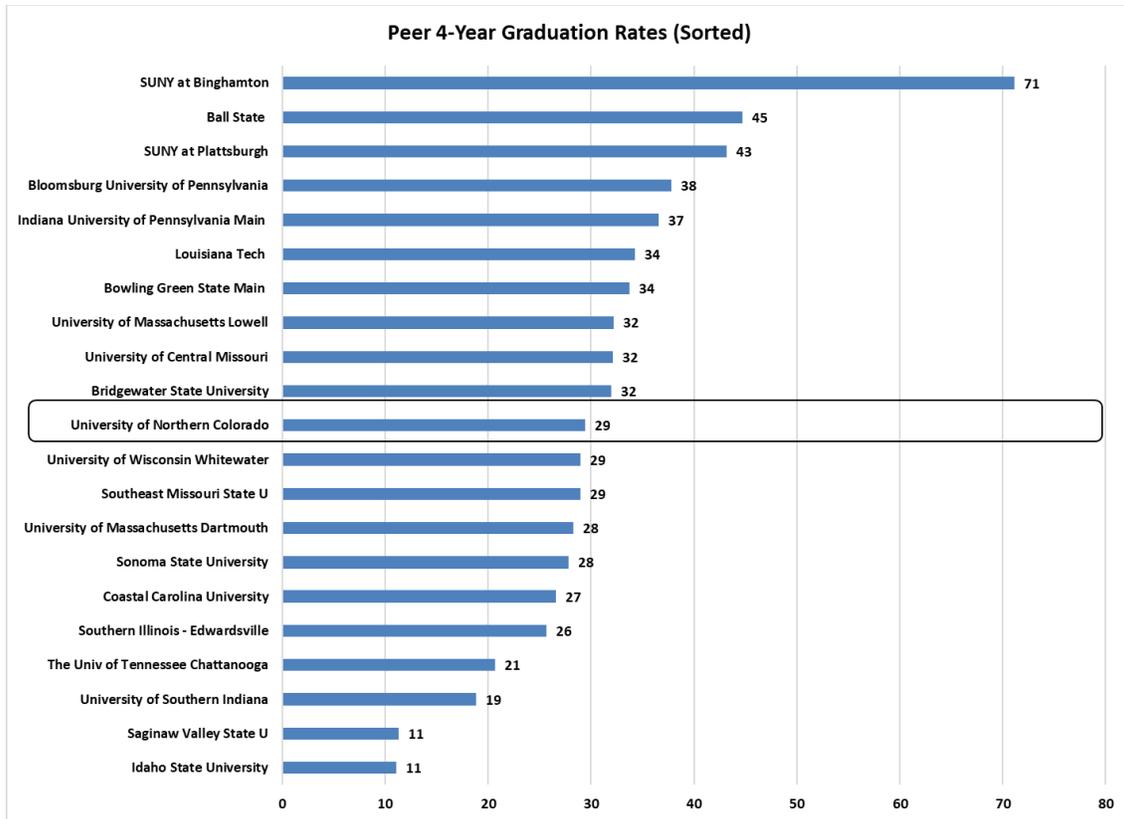
**First-time Retention Rate for Fall 2014 Entering Class (Full Time Only)**

	<i>% Retained</i>
<i>University of Northern Colorado</i>	<b>72</b>
<i>Ball State</i>	82
<i>Bloomsburg University of Pennsylvania</i>	77
<i>Bowling Green State Main</i>	78
<i>Bridgewater State University</i>	79
<i>Coastal Carolina University</i>	65
<i>Idaho State University</i>	72
<i>Indiana University of Pennsylvania Main</i>	76
<i>Louisiana Tech</i>	80
<i>Saginaw Valley State U</i>	72
<i>Sonoma State University</i>	81
<i>Southeast Missouri State U</i>	73
<i>Southern Illinois - Edwardsville</i>	74
<i>SUNY at Binghamton</i>	91
<i>SUNY at Plattsburgh</i>	83
<i>The Univ. of Tennessee Chattanooga</i>	71
<i>University of Central Missouri</i>	71
<i>University of Massachusetts Dartmouth</i>	75
<i>University of Massachusetts Lowell</i>	86
<i>University of Southern Indiana</i>	71
<i>University of Wisconsin Whitewater</i>	81



**Graduation Rates for Fall 2010 Entering Class (Full Time Only)**

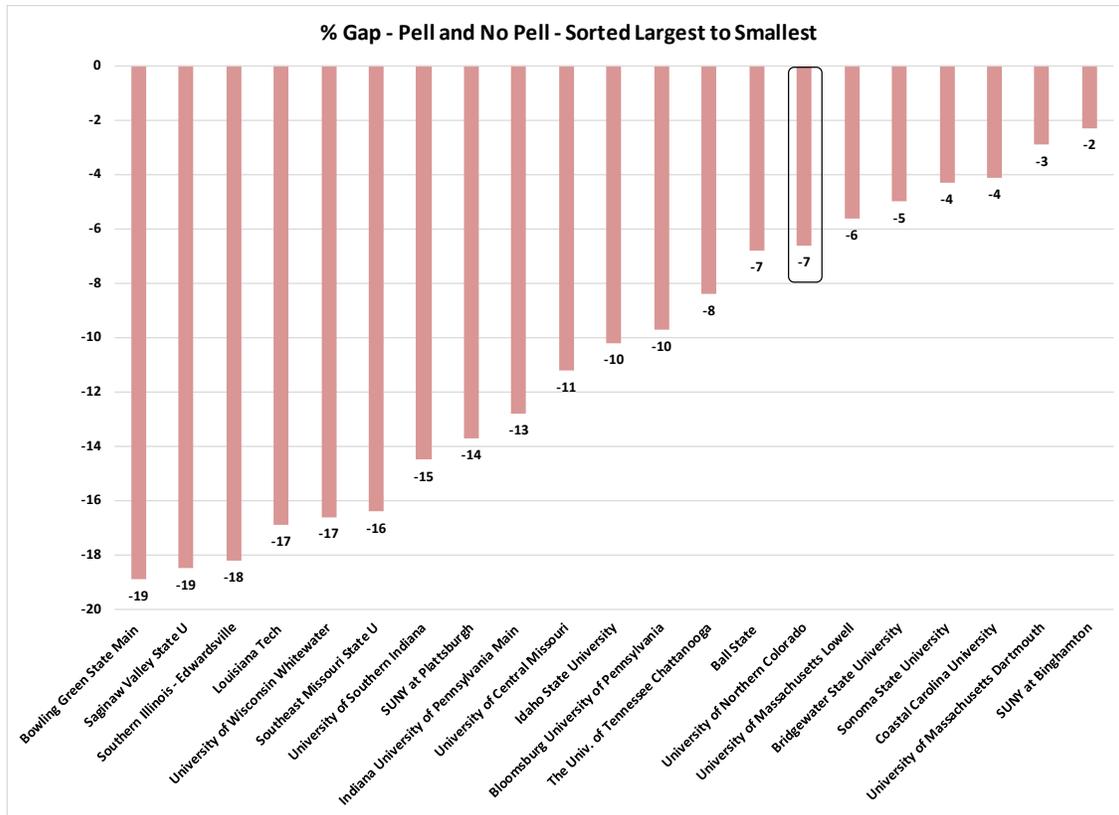
	<b>% 4-Year</b>	<b>% 5-Year</b>	<b>% 6-Year</b>
<b><i>University of Northern Colorado</i></b>	<b>29</b>	<b>46</b>	<b>48</b>
<i>Ball State</i>	45	60	62
<i>Bloomsburg University of Pennsylvania</i>	38	59	62
<i>Bowling Green State Main</i>	34	50	53
<i>Bridgewater State University</i>	32	53	59
<i>Coastal Carolina University</i>	27	39	42
<i>Idaho State University</i>	11	22	28
<i>Indiana University of Pennsylvania Main</i>	37	51	54
<i>Louisiana Tech</i>	34	48	53
<i>Saginaw Valley State U</i>	11	30	38
<i>Sonoma State University</i>	28	56	61
<i>Southeast Missouri State U</i>	29	44	49
<i>Southern Illinois - Edwardsville</i>	26	42	47
<i>SUNY at Binghamton</i>	71	82	83
<i>SUNY at Plattsburgh</i>	43	62	63
<i>The Univ. of Tennessee Chattanooga</i>	21	40	44
<i>University of Central Missouri</i>	32	49	53
<i>University of Massachusetts Dartmouth</i>	28	45	48
<i>University of Massachusetts Lowell</i>	32	52	56
<i>University of Southern Indiana</i>	19	34	38
<i>University of Wisconsin Whitewater</i>	29	53	57



**Six-year Graduation Rates for Fall 2010 (Full Time Only) by Pell and Non Pell**

	<i>% Pell Graduated</i>	<i>% Non-Pell</i>	<i>% Gap</i>
<b><i>University of Northern Colorado</i></b>	<b>44</b>	<b>51</b>	<b>-7</b>
<i>Ball State</i>	58	65	-7
<i>Bloomsburg University of Pennsylvania</i>	55	65	-10
<i>Bowling Green State Main</i>	42	61	-19
<i>Bridgewater State University</i>	55	60	-5
<i>Coastal Carolina University</i>	39	43	-4
<i>Idaho State University</i>	23	33	-10
<i>Indiana University of Pennsylvania Main</i>	46	59	-13
<i>Louisiana Tech</i>	42	59	-17
<i>Saginaw Valley State U</i>	28	47	-19
<i>Sonoma State University</i>	58	62	-4
<i>Southeast Missouri State U</i>	39	55	-16
<i>Southern Illinois - Edwardsville</i>	35	54	-18
<i>SUNY at Binghamton</i>	81	84	-2
<i>SUNY at Plattsburgh</i>	54	68	-14
<i>The Univ. of Tennessee Chattanooga</i>	39	47	-8
<i>University of Central Missouri</i>	46	57	-11
<i>University of Massachusetts Dartmouth</i>	47	50	-3
<i>University of Massachusetts Lowell</i>	52	58	-6
<i>University of Southern Indiana</i>	29	44	-15
<i>University of Wisconsin Whitewater</i>	46	62	-17

\*Note: Rates and gaps are rounded to nearest percentage point.



### Six-year Graduation Rates for Fall 2010 (Full Time Only) by URM and Non URM

	% URM Graduated	% Non URM	% Gap
<b>University of Northern Colorado</b>	<b>44</b>	<b>51</b>	<b>-7</b>
Ball State	50	63	-13
Bloomsburg University of Pennsylvania	40	66	-25
Bowling Green State Main	38	57	-18
Bridgewater State University	53	59	-6
Coastal Carolina University	42	42	1
Idaho State University	25	27	-2
Indiana University of Pennsylvania Main	35	58	-23
Louisiana Tech	39	56	-17
Saginaw Valley State U	21	42	-21
Sonoma State University	55	64	-9
Southeast Missouri State U	34	51	-17
Southern Illinois - Edwardsville	29	53	-24
SUNY at Binghamton	83	85	-2
SUNY at Plattsburgh	61	65	-3
The Univ. of Tennessee Chattanooga	37	46	-9
University of Central Missouri	39	57	-18
University of Massachusetts Dartmouth	45	49	-4
University of Massachusetts Lowell	39	59	-20
University of Southern Indiana	22	40	-19
University of Wisconsin Whitewater	37	60	-24

\*Note: Rates and gaps are rounded to nearest percentage point.

