Creating and Deploying School/Department/Center Scorecards

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Rick Burnette

APLU/CIMA Workshop
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Session Overview

• Listing of driving forces for scorecards
• FSU scorecard origins and process
• Identifying and weighing data to include
• Presentation of Scorecard sample
• Scorecard use at FSU
• Questions about FSU case study
• Best practice activity to include data identification, sources and suggestions
Driving Forces

• Performance Funding (Preeminence Funding for FSU)
• Budgetary Purposes – tighter budgets meant tougher decisions
• Public Accountability
• Intra-institutional calibration
• Need for a simple, common, medium
FSU Origins and Process

- Provost’s desire to have common talking points in annual reviews with deans
- A want to associate college, department, and program activities with university metrics
- Desire to identify faculty and program performance at present and over time relative to the institution and its goals
- Creation of the development team
Choosing Data

• Find data of broadest relevance
• Choose data that affect important areas:
  – Instruction
  – Student Success
  – Post-Graduation Outcomes
  – Research Expenditures
  – Research Proposals
  – Faculty productivity
Academic Analytics Challenge

• FSU has a strong tradition in fine and performing arts and humanities and less than two-thirds STEM.
• Academic Analytics was rolled out over 2 years
  – Data validation
  – Trust building
• Dealing with Objections
FSU’s (current) Scorecard

• We are in the second iteration and have used them for three years.
• Data are compiled by the Office of Institutional Research in cooperation with the VP of Research and VP of Faculty Development and Advancement
• Comparison cohorts are usually Research I Publics
• Exceptions – Public Admin and Sport Management
## Psychology

2017 FT Ranked Faculty: Professor - 24 (0), Associate - 5 (0), Assistant - 11 (1)
2017 FT Specialized Faculty: Instruction - 4 (0), Research - 8 (0), Postdocs - 5 (1)

### 5-Yr Fundable Credit Hour

<table>
<thead>
<tr>
<th>Credit Hours</th>
<th>2013-14</th>
<th>2014-15</th>
<th>2015-16</th>
<th>2016-17</th>
<th>2017-18</th>
<th>5Y Total</th>
<th>Change</th>
<th>5Y Coll T</th>
<th>% of Coll</th>
<th>5Y Univ T</th>
<th>% of Univ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower</td>
<td>13,745</td>
<td>13,751</td>
<td>13,901</td>
<td>13,698</td>
<td>14,910</td>
<td>70,005</td>
<td>8.48%</td>
<td>1,392,770</td>
<td>5.03%</td>
<td>2,057,550</td>
<td>3.40%</td>
</tr>
<tr>
<td>Upper</td>
<td>36,297</td>
<td>36,402</td>
<td>34,114</td>
<td>34,776</td>
<td>35,380</td>
<td>176,969</td>
<td>-2.53%</td>
<td>782,810</td>
<td>22.61%</td>
<td>2,426,155</td>
<td>7.29%</td>
</tr>
<tr>
<td>Grad I</td>
<td>854</td>
<td>824</td>
<td>757</td>
<td>846</td>
<td>892</td>
<td>4,173</td>
<td>4.45%</td>
<td>59,975</td>
<td>6.96%</td>
<td>403,505</td>
<td>1.03%</td>
</tr>
<tr>
<td>Grad II</td>
<td>4,096</td>
<td>4,087</td>
<td>4,114</td>
<td>3,673</td>
<td>4,125</td>
<td>20,095</td>
<td>0.71%</td>
<td>172,114</td>
<td>11.68%</td>
<td>425,671</td>
<td>4.72%</td>
</tr>
<tr>
<td>Total</td>
<td>54,992</td>
<td>55,064</td>
<td>52,886</td>
<td>52,993</td>
<td>55,307</td>
<td>271,242</td>
<td>0.57%</td>
<td>2,407,669</td>
<td>11.27%</td>
<td>5,312,881</td>
<td>5.11%</td>
</tr>
</tbody>
</table>

### 5-Yr Headcount of Degree-Seeking Students Enrolled in Department

<table>
<thead>
<tr>
<th>Level</th>
<th>Fall 13</th>
<th>Fall 14</th>
<th>Fall 15</th>
<th>Fall 16</th>
<th>Fall 17</th>
<th>5Y Avg</th>
<th>Change</th>
<th>5Y Coll Avg</th>
<th>% of Coll</th>
<th>5Y Univ Avg</th>
<th>% of Univ</th>
</tr>
</thead>
<tbody>
<tr>
<td>UG (B)</td>
<td>1,836</td>
<td>1,866</td>
<td>1,897</td>
<td>1,916</td>
<td>1,990</td>
<td>1,901</td>
<td>8.39%</td>
<td>9,002</td>
<td>21.12%</td>
<td>32,567</td>
<td>5.84%</td>
</tr>
<tr>
<td>Grad</td>
<td>163</td>
<td>164</td>
<td>161</td>
<td>163</td>
<td>166</td>
<td>163</td>
<td>1.84%</td>
<td>1,778</td>
<td>9.19%</td>
<td>7,924</td>
<td>2.06%</td>
</tr>
<tr>
<td>Total</td>
<td>1,999</td>
<td>2,030</td>
<td>2,058</td>
<td>2,079</td>
<td>2,156</td>
<td>2,064</td>
<td>7.85%</td>
<td>10,779</td>
<td>19.15%</td>
<td>40,491</td>
<td>5.10%</td>
</tr>
</tbody>
</table>

### 5-Yr Degrees Granted Trend by Department

<table>
<thead>
<tr>
<th>Measure</th>
<th>2012-13</th>
<th>2013-14</th>
<th>2014-15</th>
<th>2015-16</th>
<th>2016-17</th>
<th>5Y Total</th>
<th>Change</th>
<th>5Y Coll T</th>
<th>% of Coll</th>
<th>5Y Univ T</th>
<th>% of Univ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor's</td>
<td>504</td>
<td>516</td>
<td>541</td>
<td>574</td>
<td>568</td>
<td>2,703</td>
<td>12.70%</td>
<td>10,776</td>
<td>25.08%</td>
<td>41,701</td>
<td>6.48%</td>
</tr>
<tr>
<td>Master's</td>
<td>39</td>
<td>30</td>
<td>35</td>
<td>35</td>
<td>35</td>
<td>174</td>
<td>-10.26%</td>
<td>1,508</td>
<td>11.54%</td>
<td>10,674</td>
<td>1.63%</td>
</tr>
<tr>
<td>Doctorate</td>
<td>16</td>
<td>13</td>
<td>21</td>
<td>20</td>
<td>22</td>
<td>92</td>
<td>37.50%</td>
<td>887</td>
<td>10.37%</td>
<td>3,828</td>
<td>2.40%</td>
</tr>
<tr>
<td>Total</td>
<td>559</td>
<td>559</td>
<td>597</td>
<td>629</td>
<td>625</td>
<td>2,969</td>
<td>11.81%</td>
<td>13,171</td>
<td>22.54%</td>
<td>56,203</td>
<td>5.28%</td>
</tr>
</tbody>
</table>
### 5-Yr C&G Expenditures by Source

<table>
<thead>
<tr>
<th>Source</th>
<th>FY 12-13</th>
<th>FY 13-14</th>
<th>FY 14-15</th>
<th>FY 15-16</th>
<th>FY 16-17</th>
<th>5Y Total</th>
<th>Change</th>
<th>5Y Coll T</th>
<th>% of Coll</th>
<th>5Y Univ T</th>
<th>% of Un</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td>12,512,796</td>
<td>11,873,803</td>
<td>12,400,340</td>
<td>11,175,140</td>
<td>10,073,150</td>
<td>58,035,229</td>
<td>-19%</td>
<td>212,664,636</td>
<td>27%</td>
<td>562,656,280</td>
<td>10.31%</td>
</tr>
<tr>
<td>State</td>
<td>166,776</td>
<td>209,380</td>
<td>381,418</td>
<td>244,769</td>
<td>13,385</td>
<td>1,015,728</td>
<td>-92%</td>
<td>2,167,919</td>
<td>47%</td>
<td>32,638,545</td>
<td>3.11%</td>
</tr>
<tr>
<td>Other</td>
<td>251,101</td>
<td>408,642</td>
<td>465,891</td>
<td>263,036</td>
<td>262,183</td>
<td>1,650,853</td>
<td>4%</td>
<td>46,789,456</td>
<td>4%</td>
<td>82,227,804</td>
<td>2.01%</td>
</tr>
<tr>
<td>Total</td>
<td>12,930,673</td>
<td>12,491,825</td>
<td>13,247,649</td>
<td>11,682,945</td>
<td>10,348,718</td>
<td>60,701,810</td>
<td>-20%</td>
<td>260,622,011</td>
<td>23%</td>
<td>677,522,629</td>
<td>8.96%</td>
</tr>
</tbody>
</table>

#### 5-Yr Total C&G Expenditures

![Chart showing 5-year total C&G expenditures](chart.png)
### FY 13-17 Proposals by Faculty as PI & Co-PI

<table>
<thead>
<tr>
<th>Proposals Total</th>
<th># Fac as PI</th>
<th>% Total Fac as PI</th>
<th># Fac as Co-PI</th>
<th>% Fac as Co-PI</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>4</td>
<td>10%</td>
<td>8</td>
<td>20%</td>
</tr>
<tr>
<td>1-4</td>
<td>16</td>
<td>39%</td>
<td>17</td>
<td>41%</td>
</tr>
<tr>
<td>5-8</td>
<td>12</td>
<td>29%</td>
<td>10</td>
<td>24%</td>
</tr>
<tr>
<td>9-12</td>
<td>7</td>
<td>17%</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>13-16</td>
<td>2</td>
<td>5%</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>17+</td>
<td>0</td>
<td>0%</td>
<td>4</td>
<td>10%</td>
</tr>
<tr>
<td>Total</td>
<td>41</td>
<td>100%</td>
<td>41</td>
<td>100%</td>
</tr>
</tbody>
</table>

### FY 13-17 Total C&G Expenditures as PI

<table>
<thead>
<tr>
<th>Amount in Millions</th>
<th># Faculty</th>
<th>% All Fac</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>10</td>
<td>24%</td>
</tr>
<tr>
<td>&lt;.1M</td>
<td>5</td>
<td>12%</td>
</tr>
<tr>
<td>.1M-.5M</td>
<td>8</td>
<td>20%</td>
</tr>
<tr>
<td>.5M-1M</td>
<td>8</td>
<td>20%</td>
</tr>
<tr>
<td>1M-5M</td>
<td>7</td>
<td>17%</td>
</tr>
<tr>
<td>&gt;5M</td>
<td>3</td>
<td>7%</td>
</tr>
<tr>
<td>Total</td>
<td>41</td>
<td>100%</td>
</tr>
</tbody>
</table>

### 5-Yr Proposals by Faculty as PI & Co-PI

#### Number of Proposals

- 0 Proposals: 10
- 1-4 Proposals: 16
- 5-8 Proposals: 12
- 9-12 Proposals: 7
- 13-16 Proposals: 2
- 17+ Proposals: 0

#### Number of Faculty Members

- 0 Proposals: 4
- 1-4 Proposals: 16/17
- 5-8 Proposals: 12/10
- 9-12 Proposals: 7/1
- 13-16 Proposals: 2/1
- 17+ Proposals: 0/4

### 5-Yr C&G PI expenditures

#### Number of Proposals

- $0: 10
- <.1M: 5
- .1M-.5M: 8
- .5M-1M: 8
- 1M-5M: 7
- >5M: 3

#### Number of Faculty Members

- $0: 10
- <.1M: 5
- .1M-.5M: 8
- .5M-1M: 8
- 1M-5M: 7
- >5M: 3
The Use of Scorecards at FSU

• Data-based conversation starter for deans
• Common format versus cherry-picking
• Scorecards as referent for SWOT analysis
• Sharing data directly with departments
• Scorecards showed relative contributions to various metrics
• Reactions from deans, chairs and faculty
• Other metric-driven initiatives followed
Questions on use of Scorecards

We will entertain questions and comments about the FSU Case Study

Best-practice activity to follow
Scorecard Activity

• Identify uniquely different scorecards
  – College, Department, Academic Program
  – Research Centers
• Separate into Groups of 4 – 6 people
• What data and sources would you add?
• Identify concerns by data type/source
• Identify your experiences with similar
• What suggestions do you have for others?
Thank You!

The half of knowledge is to know where to find knowledge.
Presenter Information

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