

Introduction

This report constitutes the initial effort of a work team of senior administrators and researchers across the Regional University System of Oklahoma to provide a Dashboard of Benchmark metrics to be employed for accountability and advocacy efforts.

Data contained in this report is a reflection of the yeoman work provided by these professionals in following the direction of the RUSO Board of Regents at its October meeting to present the first set of metrics at the November Board meeting.

This has been an important and useful exercise in numerous ways. A primary benefit is the opening a dialogue between the campuses to agree on those data sets that reflect the distinct mission of our institutions to teaching and learning. Further, the information exchanges have highlighted the challenging task of arriving at common definitions and data sources that can compare performance in a similar way across all institutions.

A review began this fall of potential metrics common to RUSO institutions that could provide a useful dashboard for the Board of Regents of the Regional University System of Oklahoma and campus leaders to assess the efficiency and effectiveness of our six institutions. Further, these metrics can prove to be useful tools to the Board and the institutions to tell a positive story of successful mission fulfilment to Oklahoma's decision-makers, influencers, and our own internal constituencies.

Metrics for this dashboard are drawn from numerous sources. A primary source is the Bill and Melinda Gates Foundation study, *Answering the Call: Institutions and States Lead the Way Toward Better Measures of Postsecondary Performance*, (Engle, J., 2016). However, this report is supplemented by other data sources based on the expertise of those institutional leaders who continue to contribute to this conversation. Additional sources include:

- The *Student Achievement Measure* (SAM) dashboard established as a national collaborative project between the American Association of State Colleges & Universities (AASCU) and the Association of Public Land-grant Universities (APLU). SAM provides the most authentic data set on student progress as it tracks all students, regardless of their enrollment circumstances. Through the National Clearinghouse, it also tracks the progress of students who begin at a RUSO institution and are attending or have graduated from another institution.
- The *Integrated Postsecondary Education Data System* (IPEDS) from the U.S. Department of Education. This is a common data set for all 4,000 U.S. higher education institutions. Definitions for various metrics can be problematic in providing a true picture of RUSO institutions.
- The Unitary Data System (UDS) of the Oklahoma State Regents for Higher Education that tracks 75 data elements for each enrolled student in Oklahoma.
- Customized institutional data sources provided by campus senior administrators. Some benchmarks include comparing institutional data to best practices recommended by The National Association of College & University Business Officers (NACUBO).

Future areas to be explored as Benchmarks will analyze these data sources to measure equity, efficiency, and effectiveness in admissions, progress toward degree, graduation, and student satisfaction. The philosophical purpose will be to determine their usefulness in contributing to upward social mobility for our students. These future exploration areas will be discussed later in this report.

A consideration for relying on the Gates Foundation metrics as a foundation to establishing a RUSO Dashboard is that it constitutes a conceptual framework for measuring student success. Other national data sources primarily rely on the value of a degree as a commodity to be purchased solely that emphasizes its return on investment through income earnings. The Gates report recommends 35 metrics whose definitions have partially been provided by the Institute for Higher Education Policy. Of these, only six were offered as being “easily” acquired. Therefore, many of the metrics to be adopted by RUSO institutions have and continue to require collaboration among our Provosts, student affairs officers, chief financial officers, and IRB staff to achieve uniformity in measuring progress.

The recommendations for the initial benchmarks offered in this RUSO Dashboard are the consequence of extensive collaborations across the campuses. Those directly involved in these recommendations are:

- Dr. Bo Hannaford, Vice President for Academic Affairs, NWOSU.
- Dr. David Pecha, Vice President for Administration, NWOSU.
- Dr. James South, Provost and Vice President for Academic Affairs, SWOSU.
- Ms. Brenda Burgess, Vice President for Administration & Finance, SWOSU.
- Dr. Debby Landry, Interim Provost and Vice President of Academic Affairs, NSU.
- Ms. Christy Landsaw, Vice President for Administration & Finance, NSU.
- Dr. Adrianna Lancaster, Acting Provost & Vice President for Academic Affairs, ECU.
- Mr. Dennis Westman, Vice President for Business Affairs & Chief Financial Officer, SEOSU.
- Dr. Myron Pope, Vice President for Academic Affairs, UCO.
- Ms. Patti Neuhold, Vice President for Budget & Finance, UCO.
- Dr. Gary Steward, Associate Vice President for Institutional Effectiveness, UCO.
- Dr. Mark Kinders, Vice President for Public Affairs, UCO (Convener).

Providing special leadership throughout the project have been Doctors South, Hannaford, Steward, Pope, and Ms. Neuhold.

Also providing guidance to our conversations have been Board Chair Mark Stansberry, Vision and Planning Committee Chair Jeff Dunn, and RUSO Executive Director Sheridan McCaffree.

Dashboard Principles

Early in the process the work group arrived at principles for selecting and assessing the recommended benchmarks. These principles remain unchanged from the time of their initial presentation to the Board of Regents and their value has been proven as data-gathering continues.

1. The benchmarks should accurately reflect the mission of RUSO institutions as teaching enterprises whose primary role is to provide opportunities for upward social mobility for their students, many of whom are non-traditional, first-generation, part-time, or financially at risk.
2. RUSO institutions are attuned to and responsive to the national and state discussion of the past seven years that addresses the major Gates areas of Performance, Efficiency, and Equity. Previous groundwork embraced by RUSO institutions include: *Time is the Enemy*, (2011, Complete College America); *Remediation: Higher Education's Bridge to Nowhere*, (2012, Complete College America); *America Works: Education and Training for Tomorrow's Jobs*, (2013; National Governors Association); *Oklahoma Works*, (Oklahoma Office of Workforce Development, 2014); and *15 to Finish Oklahoma* (Oklahoma State Regents for Higher Education, 2017).
3. Benchmarks should emphasize the outcomes of the educational experience more so than outputs. There should be a demonstration that learning has occurred that will enable graduates to live happy professional and personal lives. Although outputs—such as graduation rates and cost measures—are important considerations, an overemphasis on these indicators results in commoditizing a college degree as a product to be purchased. This infers that the mere awarding of a degree is a proxy for an educated person who will be successful in life. Further, this mindset inordinately emphasizes whether the graduate had timely access to a program, and not whether they received an educational value from the experience.
4. Benchmarks should be drawn from available data that is collected annually by RUSO institutions. Many RUSO institutions are understaffed in meeting existing Institutional Research obligations. No additional data-gathering burdens should be placed on them by creating new metrics.
5. To ensure the definitions and formulas of the recommended benchmarks and dashboard are consistent between institutions, the discussion group recommends using those prepared in a supplemental report to *Answering the Call*. The supplemental report, issued by the Institute for Higher Education Policy, is *Toward Convergence: A Technical Guide for the Postsecondary Metrics Framework*, (Janice, A. & Voight, M., 2016).

6. A Dashboard should be employed as a measurement of progress that is institution-specific. Some benchmarks may be aggregated for RUSO overall System performance. Due to the differences between institutional profiles, it would be problematic to draw comparisons between institutions for most benchmarks.
7. To be reliable as a measurement tool, the Dashboard should include metrics charted over a 5-year period.
8. Because of the typical RUSO student profile, meaningful improvement in the categories of Performance, Efficiency, and Equity will require additional financial investment if there is to be significant improvement in retention and graduation rates, and student learning outcomes. Student success requires continuous interventions in advising, counseling, and tutoring. These interventions are costly Best Practices that cannot be achieved exclusively by the base reallocation of current limited resources to fund these intervention strategies.
9. RUSO should host an annual, one-day meeting of Institutional Research directors and a designee of the Provost/Vice President for Academic Affairs offices for each institution. The meeting should be held six months prior to the installations of the metrics. The meeting will focus on common definitions and data collection strategies. It also will be reflective to review if the definitions produced a metric that is meaningful and useful.
10. The Dashboard should be rolled out over a two- to three-year time period. This will enable the Institutional Research staff to integrate the new metrics into their existing workload.

Recommended Benchmarks

Based on the principles cited above, the discussion group's recommendations draw extensively, but not exclusively, from the Gates Foundation Framework.

Gates recommends tracking across three broad categories: Performance, Efficiency and Equity. Measurements are assessed based on Student Access, Progression, and Completion. Gates recommends 35 metrics.

In this report, the RUSO work group recommends an initial Dashboard of 14 benchmarks to be submitted to Regents on an annual or quarterly basis, drawing both upon *Answering the Call* and new metrics recommended to the Board by campus student affairs officers and business officers.

An additional 13 benchmarks are to be explored. The timeline for sifting through the viability of these metrics and reporting the work group's conclusions is at the discretion of the Board.

The benchmarks are listed below in two categories: 1) those attached to this report as appendices either as summary documents or as institutional collections; 2) those that must be explored further to establish data definitions, investigate the usefulness of the acquired data, and differentiating between those benchmarks that should be reported on an academic or fiscal calendar year basis. Data sources are listed in italics.

Benchmarks contained in this report are:

Enrollment: *SAM, IPEDS, UDS*

Retention: *SAM, IPEDS, UDS*

Credit Accumulation: *IPEDS, UDS*

Gateway Course Completion: *IPEDS, UDS*

Education Programs Offered: *Institutions*

Transfer Rate: *SAM*

Graduation Rate: *SAM*

Per-Issuance Debt Coverage Ratio: *RUSO Business Officers, new capital construction*

Composite Financial Index: *RUSO Business Officers*

Days of Cash on Hand: *RUSO Business Officers, Quarterly basis*

Restricted to unrestricted net assets ratio: *RUSO Business Officers*

Gross tuition contribution ratio and state appropriations contribution ratio:
RUSO Business Officers

Budget impact of credit hour production: *RUSO Business Officers*

Current ratio: *RUSO Business Officers*

Potential Benchmarks requiring further investigation for utility are:

Net price: *Institutions*

Student Share of Cost: *Institutions*

Expenditures Per Completion: *Institutions*

Program of Study: *Institutions*

Enrollment by Preparation, Economic Status, Age, Race/Ethnicity: *Complete College America*

Progression Performance by Preparation, Economic Status, Age, Race/Ethnicity:
Complete College America

Completion Performance by Preparation, Economic Status, Age, Race/Ethnicity:
Complete College America

Cumulative Debt: *Institutions*

Loan Repayment Rate: *Institutions*

Cohort Default Rate: *Institutions*

Student satisfaction, freshmen and graduating seniors: *National Survey of Student Experiences*

Student Learning Outcomes: *Individual Institutional Testing Sources*

Upward Social Mobility: *Criteria established in Washington Monthly Magazine*

The Field-Driven Benchmarks Framework chart below indicates the Benchmarks by categories of Access, Progression, and Completion. Those metrics provided in this initial report are highlighted in green.

FIELD-DRIVEN BENCHMARKS FRAMEWORK

PERFORMANCE	ACCESS	PROGRESSION	COMPLETION
	Enrollment Education Programs Offered	Retention Credit Accumulation Gateway Course Completion Program of Study Selection	Transfer Rate Graduation Rate Student Satisfaction Student Learning Outcomes
EFFICIENCY		Per-Issuance Debt Coverage Ratio Composite Financial Index Days of Cash on Hand Restricted to unrestricted net assets ratio Gross tuition contribution ratio and state appropriations contribution ratio Budget impact of credit hour production: Current ratio:	Expenditures Per Completion Net Price Student Share of Cost Cumulative Debt Loan Repayment Rate Cohort Default Rate

EQUITY	Enrollment by Preparation, Economic Status, Age, Race/Ethnicity	Progression Performance by Preparation, Economic Status, Age, Race/Ethnicity	Completion Performance by Preparation, Economic Status, Age, Race/Ethnicity Social Mobility
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Business Officer Benchmark Recommendations

RUSO Business Officers conducted substantial conversations on benchmarks that they thought would be most useful to Regents as a means of assessing institutional fiscal health. All but two benchmarks will be reported each November. One will be reported on a Quarterly basis. One will be reported as construction projects occur. As recommended in the Principles, these Benchmarks will be continuously reviewed by the Business Officers for validity, and may be modified in future reports.

The per-issuance debt coverage ratio is suggested to provide insight into resource management as an institution enters into new debt. This ratio illustrates an institution's ability to pay the debt service on the new issuance from the identified funding source. Each time an institution requests approval to enter additional debt it will provide the regents with this ratio in addition to the standard information such as purpose, description, amount and sources of debt service payment.

The debt burden ratio provides insight into the cost of borrowing funds. The National Association of College & University Business Officers (NACUBO) suggests the threshold for this ratio is at or below 7 percent. This means that current principal and interest expense should not represent more than 7 percent of total expenditures. It is important to note that many institutions can operate effectively at a higher ratio while others may not. This measure, like several others, is relative to each institution's plans and budget.

The **Composite Financial Index (CFI)** is a tool that provides a picture of an institution's overall financial health. The four ratios within this index are reported annually and each ratio has been identified as a relevant measure of financial health. These ratios are:

- Primary reserve
- Viability
- Return on net assets
- Net operating revenue

Days of Cash On Hand is a recommended measure of liquidity that illustrates the number of days an institution is able to operate from unrestricted and short-term investment sources. A higher ratio is typically better, however a balance must be managed to ensure institutions are appropriately investing resources in long-term investments and avoiding holding large amounts of cash. Demonstrating the trend throughout the year for this ratio would allow for expected shifts in expenditures and revenues. This metric could be provided quarterly.

Restricted to unrestricted net assets ratio is suggested to provide insight into an institution's resource flexibility. This measure will inform the regents of the portion of the institution's assets that are eligible to be used to cover all types of expenditures and those assets that can only be used to cover a designated purpose. Limitations on the use of assets can impede an institution's ability to react quickly to changes in environment. Some flexibility across institutions in this ratio is expected as each will invest and spend according to its own strategic and campus master plans.

Gross tuition contribution ratio and state appropriations contribution ratio are recommended measures that provide insight into an institution's two main sources of revenue. These measures are significant factors in influencing impact on tuition rates, program expansion or contraction, tuition waiver need, and market competitiveness. As an institution becomes more dependent on tuition revenue for operations fluctuations in enrollment will have greater impact on its financial stability.

Budget impact of credit hour production is recommended as a measure of actual performance against projected performance. Institutional budgets are built on the projected revenue that comes from tuition and fees charged on each credit hour. This metric demonstrates an institution's budget planning using trend analysis and other factors. Uncontrollable external factors such as global international relations and natural disasters can have significant unplanned impact on an institution's budget.

Current ratio provides insight into an institution's short-term assets with current liabilities. Best practices suggest a 2:1 ratio to ensure that for every dollar of liability there are at least two dollars of assets to cover it. A higher ratio is typically better, however a balance must be managed to ensure institutions are appropriately investing resources in long-term investments rather than holding a significant amount of short-term assets.

Insights gained as additional Benchmarks are explored

Due to the quick turnaround time to submit this report, campus senior leaders focused primarily on those benchmarks that were deemed to be "easy" to acquire, that on their face would be easily understood.

However, this initial exercise provided three "lessons learned":

1. "Easy" data acquisition is not as easy as it would seem. Campuses are required to report data on an annual basis to multiple agencies. The way this data is collected is not always

based on the same definitions. Further, some data sets do not have a stated definition, and so institutional policies and practices dictate how data is captured and analyzed.

2. Institutional researchers engaged in data gathering worked tirelessly to capture this initial data for this report, but were challenged due to existing workloads.
3. As noted in the Principles earlier in the report, establishing Benchmarks and a Dashboard will require close coordination between the campuses, sufficient lead time to fully explore the metrics, and a year or more of refinement before each Benchmark is considered to be useful and reliable both by the Board and the campuses.

APPENDIX A
RUSO ACCESS, PROGRESS, GRADUATION SUMMARY

RUSO Dashboard			
Name of School: RUSO Schools Combined			
Enrollment Information (total)	14-15	15-16	16-17
FTE	33,435	33,759	32,654
Total Headcount	48,632	48,505	47,496
Student Credit Hours	979,631	988,714	956,208
First Time Freshmen	5,555	5,886	5,831
First Time Full-time Freshmen	5,295	5,600	5,584
Retention Rates (average)	14-15	15-16	16-17
First Time Freshmen	61%	59%	55%
First Time Full-time Freshmen	63%	61%	60%
Graduation Rate/Degrees Granted	14-15	15-16	16-17
Graduation Rates (average)	30%	30%	32%
Certificates (total)	51	114	160
Associates (total)	220	215	214
Bachelors (total)	6,271	6,231	6,266
Master (total)	1,461	1,579	1,682
Doctoral (total)	104	110	102
Education Programs (Average)	14-15	15-16	16-17
Number of Degree Programs	67	68	70
Number of Accredited Programs	24	23	19
Gained or Lost Accreditation?			
Gateway Courses (Average)	14-15	15-16	16-17
Gateway Course Enrollment-MATH	847	843	899
Gateway Completion % - MATH	76%	72%	75%
Gateway Course Enrollment-ENGL	1,051	1,095	1,061
Gateway Completion % - ENGL	82%	82%	84%

APPENDIX B
FY17 BUSINESS METRICS SUMMARY FOR RUSO

		Metric	NACUBO Target	ECU	NSU	NWOSU	SEOSU	SWOSU	UCO	SYSTEM
Data Date	Report Date	Measures of Resource Sufficiency and Flexibility								
June 30	November	Primary reserve (Unrestricted + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Expenses)	0.40	0.37	0.28	0.68	0.40	0.34	0.39	0.41
June 30	November	Days of cash on hand (Total cash+cash equivalents+short term investments/Daily Op Expense Avg (365 days))	> 80	220.17	101.31	120.82	82.84	125.22	104.20	125.76
June 30	November	Current ratio (Total Current Assets/Total Current Liabilities)	> 2	5.57	4.00	2.91	1.76	5.22	5.24	4.12
June 30	November	Unrestricted funds ratio (Unrestricted net assets/Total net assets)	none	23.27%	16%	19.18%	20.21%	21.13%	27.61%	21.23%
Measures of Resource Management, including debt										
June 30	November	CFI	> 2	2.5	1.1	2.84	3.2	2.66	2.53	2.47
June 30	November	Viability (Unrestricted + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Long-term Debt (Bonds, Notes & Capital Leases)	none	0.58	0.59	0.90	0.30	0.78	0.49	0.61
June 30	November	Debt burden (Annual Principal and Interest Payments (debt service)/(Operating expenses + Non-Operating expenses) –	< 7 %	4.93%	4.92%	4.33%	6.14%	6.10%	6.22%	5.44%

		Depreciation expense + Principal payments made on Capital Debt and Leases								
Measures of Asset Performance and Management										
		Return on total net assets (Change in Total Net Assets + Net Pension Liability & Related Deferrals (CY – PY)/Total Net Assets + Net Pension Liability & Related Deferrals (beginning of year)								
June 30	November		3% to 4%	5.93%	-0.60%	1.03%	1.70%	8.21%	7.82%	4.02%
Measures of Operating Performance										
		Net operating revenues (Operating income (loss) + net Nonoperating revenues (expenses)/Operating revenues + Nonoperating revenues)								
June 30	November		2% to 4%	6.42%	-0.84%	0.23%	0.80%	3.80%	4.01%	2.40%
June 30	November	Gross tuition contribution ratio (LY)	< 60%	67.09%	55%	62.64%	64.1%	65.55%	62.13%	62.76%
June 30	November	State appropriations contribution ratio (LY)	none	32.86%	35%	32.72%	34.56%	29.09%	23.50%	31.29%
June 30	November	Budget impact of credit hour production	over (under)	\$(1,192,008)	\$(1,361,568)	\$254,305	\$(3,494.89)	\$454,675	\$(3,724,025)	\$(5,572,115.89)

APPENDIX C

EAST CENTRAL UNIVERSITY

Student Achievement Measure: **East Central University**

<http://studentachievementmeasure.org/participants/207041>

East Central University

At East Central University (ECU), we are committed to student success in an academic environment that encourages lifelong development as learners, scholars, teachers, and mentors. Our excitement and successes are based upon the hallmarks of ECU academics, meeting and maintaining high standards, providing quality instruction, outstanding facilities, and a wide range of co-curricular and extracurricular activities and organizations.



Website:
www.ecok.edu

Email:
scooper@ecok.edu

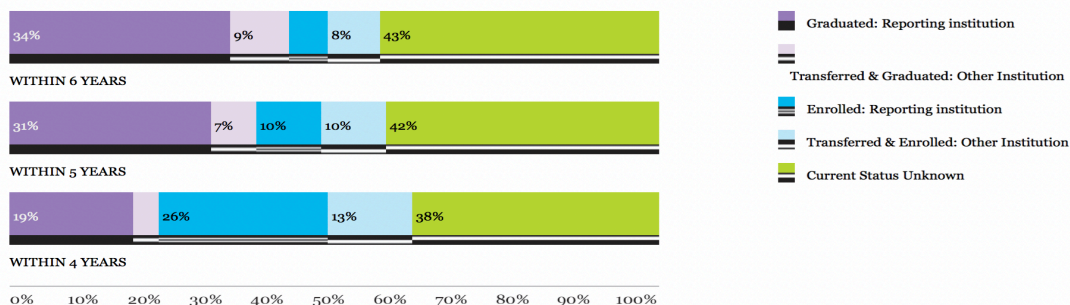
BACHELOR'S MODEL

First-Time Full-Time

First-Time Full-Time Students Starting Fall 2010

Number of students: 598

roll over each bar for detail data

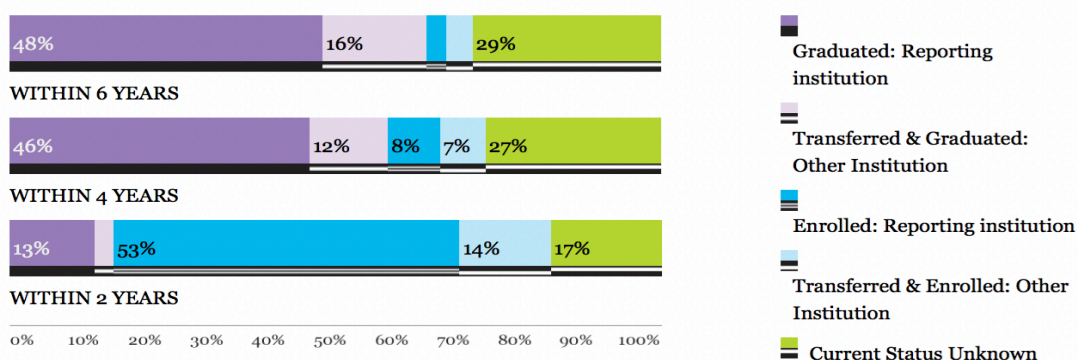


Full-Time Transfer

Full-Time Transfer Students Starting Fall 2010

Number of students: 330

roll over each bar for detail data



APPENDIX C
EAST CENTRAL UNIVERSITY
ACCESS, PROGRESS, GRADUATION METRICS

Enrollment Information	14-15	15-16	16-17	
FTE	3827	4346	3511	<i>OSRHE Headcount and Full-Time Equivalent for Class Divisions for ALL Semesters for Academic Year 2015-16 (www.okeys.org) or IPEDS</i>
Total Headcount (Academic Year)	5458	5450	4962	<i>OSRHE Headcount and Full-Time Equivalent for Class Divisions for ALL Semesters for Academic Year 2015-16 (www.okeys.org) or IPEDS</i>
Total Headcount (Fall)	4428	4444	4160	<i>UDS Record S Fall Semester</i>
Student Credit Hours	111421	126916	102228	<i>OSRHE Headcount and Full-Time Equivalent for Class Divisions for ALL Semesters for Academic Year 2015-16 (www.okeys.org)</i>
First Time Freshmen (Fall)	605	748	596	<i>IPEDS Fall Enrollment</i>
First Time Full-time Freshmen (Fall)	581	741	586	<i>IPEDS Fall Enrollment</i>
Retention Rates	14-15	15-16	16-17	
First Time Freshmen	64%	54%	47%	<i>OIE Calculations</i>
First Time Full-time Freshmen	64%	52%	*	<i>IPEDS Fall Enrollment</i>
<i>*won't have official IPEDS number until April 18</i>				
Graduation Rate/Degrees Granted	14-15	15-16	16-17	
Graduation Rates %	34%	36%	34%	<i>IPEDS GRS</i>
Certificates # (Undg & Grad)	41	51	83	<i>IPEDS Completions</i>
Associates	--	--	--	
Bachelors #	724	683	688	<i>IPEDS Completions</i>
Master #	256	274	261	<i>IPEDS Completions</i>
Doctoral	--	--	--	
Education Programs	14-15	15-16	16-17	
Number of Degree Programs	54	52	57	<i>OSRHE Degree Programs Inventory</i>
Number of Accredited Programs	16	13	13	<i>OSRHE Degree Program Review</i>
Gained or Lost Accreditation?	0	3	0	<i>OSRHE Degree Program Review</i>
Gateway Courses (SU, FA, SP)	14-15	15-16	16-17	
Gateway Course Enrollment-MATH	204	204	138	<i>MATH 1413 Survey of Math</i>
Gateway Completion % - MATH	78%	67%	70%	
Gateway Course Enrollment-ENGL	680	832	604	<i>ENG 1113 Freshman Comp</i>
Gateway Completion % - ENGL	79%	76%	82%	
<i>UDS Record E Unsuccessful Grade (5, 6, 7, 8, 9, W, N)</i>				

APPENDIX C
FY17 BUSINESS METRICS: EAST CENTRAL UNIVERSITY

		Metric	NACUBO Target	ECU
Data Date	Report Date	Measures of Resource Sufficiency and Flexibility		
June 30	November	Primary reserve (Unrestricted + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Expenses)	0.40	0.37
June 30	November	Days of cash on hand (Total cash+cash equivalents+short term investments/Daily Op Expense Avg (365 days))	> 80	220.17
June 30	November	Current ratio (Total Current Assets/Total Current Liabilities)	> 2	5.57
June 30	November	Unrestricted funds ratio (Unrestricted net assets/Total net assets)	none	23.27%
Measures of Resource Management, including debt				
June 30	November	CFI	> 2	2.5
June 30	November	Viability (Unrestricted + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Long-term Debt (Bonds, Notes & Capital Leases)	none	0.58
June 30	November	Debt burden (Annual Principal and Interest Payments (debt service)/(Operating expenses + Non-Operating expenses) – Depreciation expense + Principal payments made on Capital Debt and Leases	< 7 %	4.93%
Measures of Asset Performance and Management				
June 30	November	Return on total net assets (Change in Total Net Assets + Net Pension Liability & Related Deferrals (CY – PY)/Total Net Assets + Net Pension Liability & Related Deferrals (beginning of year)	3% to 4%	5.93%
Measures of Operating Performance				
June 30	November	Net operating revenues (Operating income (loss) + net Nonoperating revenues (expenses)/Operating revenues + Nonoperating revenues)	2% to 4%	6.42%
June 30	November	Gross tuition contribution ratio (LY)	< 60%	67.09%
June 30	November	State appropriations contribution ratio (LY)	none	32.86%
June 30	November	Budget impact of credit hour production	over (under)	\$(1,192,008.00)

APPENDIX D

NORTHEASTERN STATE UNIVERSITY

Student Achievement Measure: **Northeastern State University**
<http://studentachievementmeasure.org/participants/207041>

Northeastern State University

With three scenic campuses in Tahlequah, Muskogee, and Broken Arrow, Northeastern State University is Oklahoma's fourth largest public four-year institution of higher learning. NSU was founded in 1846 as the Cherokee National Female Seminary, opening its doors in 1851 as the first institution of higher learning in Indian Territory. On March 6, 1909, the Oklahoma legislature purchased the Seminary from the Cherokee Nation and on September 14, classes began at the newly formed Northeastern State Normal School in Tahlequah. Through the decades, NSU has played a key role in the area's history and development. Today, NSU offers a comprehensive education with academic emphases in business, technology, social sciences, mathematics, health professions, sciences, optometry, education, language and the arts. We empower students, faculty, staff and the community to reach their full intellectual and human potential by creating and expanding a culture of learning, discovery, and diversity.

Website:

www.nsuok.edu

Email:

nsuinfo@nsuok.edu

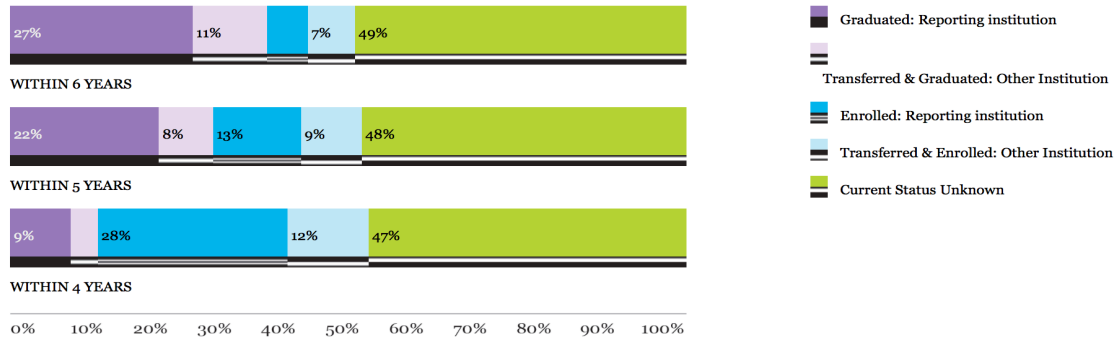
BACHELOR'S MODEL

First-Time Full-Time

First-Time Full-Time Students Starting Fall 2010

Number of students: 1,143

roll over each bar for detail data

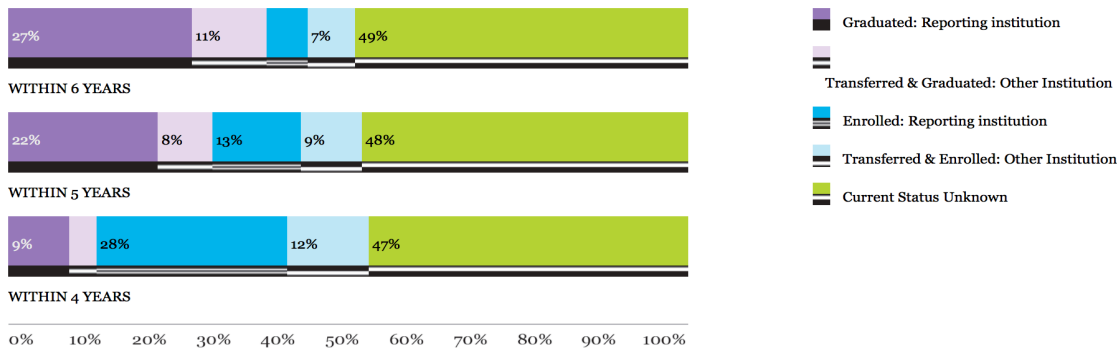


First-Time Full-Time

First-Time Full-Time Students Starting Fall 2010

Number of students: 1,143

roll over each bar for detail data



APPENDIX D
NORTHEASTERN STATE UNIVERSITY
ACCESS, PROGRESS, GRADUATION METRICS

Enrollment Information	14-15	15-16	16-17	NOTES
FTE	6722	6663	6494	From IPEDS 12-month Enrollment
Total Headcount	9882	9734	9556	From IPEDS 12-month Enrollment
Student Credit Hours	196001	194074	189317	From UDS ViStat Course Enrollment reports
First Time Freshmen	935	821	907	From IPEDS Fall Enrollment - Fall cohorts (includes summer starters)
First Time Full-time Freshmen	906	806	879	From IPEDS Fall Enrollment - Fall cohorts (includes summer starters)
Retention Rates	14-15	15-16	16-17	
First Time Freshmen	61%	65%	62%	Fall 2014 cohort returning Fall 2015 and Fall 2015 cohort returning Fall 2016 from IPEDS Fall Enrollment; Fall 2016 cohort returning Fall 2017 from internal data as of census data of 9/1/17
First Time Full-time Freshmen	62%	65%	63%	Fall 2014 cohort returning Fall 2015 and Fall 2015 cohort returning Fall 2016 from IPEDS Fall Enrollment; Fall 2016 cohort returning Fall 2017 from internal data as of census data of 9/1/17
Graduation Rate/Degrees Granted	14-15	15-16	16-17	
Graduation Rates	26%	27%	32%	From IPEDS Graduate Rate Survey for Fall 2009 and Fall 2010 first-time full-time cohorts; calculated from UDS Record D and internal data for Fall 2011 first-time full-time cohort
Certificates	10	10	17	From IPEDS Completions
Associates	0	0	0	From IPEDS Completions
Bachelors	1378	1372	1370	From IPEDS Completions
Master	319	331	416	From IPEDS Completions
Doctoral	28	28	29	From IPEDS Completions
Education Programs	14-15	15-16	16-17	
Number of Degree Programs	79	82	83	Suspended programs removed from total
Number of Accredited Programs	42	43	43	
Gained or Lost Accreditation?	1	1	0	CACREP gained SP15; ACOTE

gained SP16

Gateway Courses	14-15	15-16	16-17	
Gateway Course Enrollment-MATH	1074	1089	1350	From UDS Record E – Includes College Algebra & Applied Mathematics
Gateway Completion % - MATH	73%	65%	69%	From UDS Record E - Includes College Algebra & Applied Mathematics
Gateway Course Enrollment-ENGL	1872	1742	1754	From UDS Record E - Includes Freshman Composition I & Freshman Composition II
Gateway Completion % - ENGL	80%	79%	81%	From UDS Record E – Includes Freshman Composition I & Freshman Composition II

		Metric	NACUBO Target	NSU
Data Date	Report Date	Measures of Resource Sufficiency and Flexibility		
June 30	November	Primary reserve (Unrestricted + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Expenses)	0.40	0.28
June 30	November	Days of cash on hand (Total cash+cash equivalents+short term investments/Daily Op Expense Avg (365 days))	> 80	101.31
June 30	November	Current ratio (Total Current Assets/Total Current Liabilities)	> 2	4.00
June 30	November	Unrestricted funds ratio (Unrestricted net assets/Total net assets)	none	16%
Measures of Resource Management, including debt				
June 30	November	CFI	> 2	1.1
June 30	November	Viability (Unrestricted + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Long-term Debt (Bonds, Notes & Capital Leases)	none	0.59
June 30	November	Debt burden (Annual Principal and Interest Payments (debt service)/(Operating expenses + Non-Operating expenses) – Depreciation expense + Principal payments made on Capital Debt and Leases	< 7 %	4.92%
Measures of Asset Performance and Management				
June 30	November	Return on total net assets (Change in Total Net Assets + Net Pension Liability & Related Deferrals (CY – PY)/Total Net Assets + Net Pension Liability & Related Deferrals (beginning of year)	3% to 4%	-0.60%
Measures of Operating Performance				
June 30	November	Net operating revenues (Operating income (loss) + net Nonoperating revenues (expenses)/Operating revenues + Nonoperating revenues)	2% to 4%	-0.84%
June 30	November	Gross tuition contribution ratio (LY)	< 60%	55%
June 30	November	State appropriations contribution ratio (LY)	none	35%
June 30	November	Budget impact of credit hour production	over (under)	\$(1,361,568)

APPENDIX E NORTHWESTERN OKLAHOMA STATE UNIVERSITY

Student Achievement Measure: **Northwestern Oklahoma State University**
<http://studentachievementmeasure.org/participants/207306>

Northwestern Oklahoma State University

Northwestern Oklahoma State University is a three-campus, public regional university serving approximately 2,200 students. The main campus is located in Alva, with branch campuses located in Enid and Woodward. Northwestern features approximately 40 undergraduate degree programs and offers graduate degrees in education, counseling psychology and American studies. A doctoral program in advanced nursing practice is scheduled to begin in the fall semester of 2017. The University has received national recognition from U.S. News and World Report and other publication for affordability and low student debt of graduates. Academic programs in nursing, business, accounting, education and social work have received national accolades for their quality.

Website:

www.nwosu.edu

Email:

bmfuller@nwosu.edu

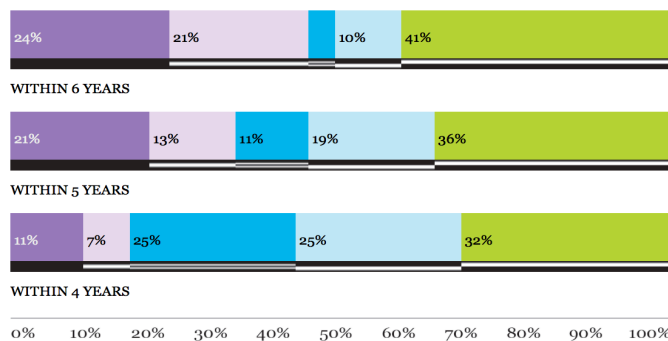
BACHELOR'S MODEL

First-Time Full-Time

First-Time Full-Time Students Starting Fall 2010

Number of students: 370

roll over each bar for detail data



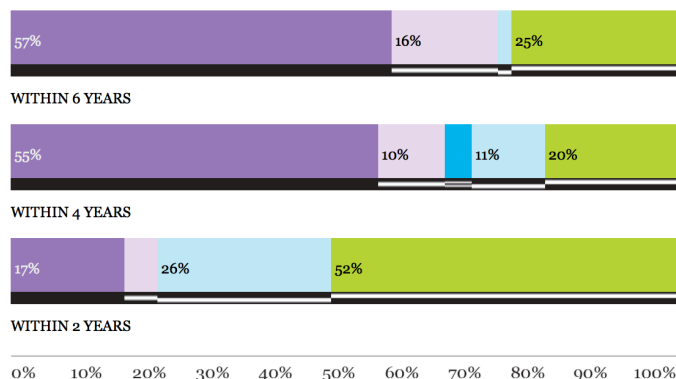
- Graduated: Reporting institution
- Transferred & Graduated: Other Institution
- Enrolled: Reporting institution
- Transferred & Enrolled: Other Institution
- Current Status Unknown

Full-Time Transfer

Full-Time Transfer Students Starting Fall 2010

Number of students: 153

roll over each bar for detail data



- Graduated: Reporting institution
- Transferred & Graduated: Other Institution
- Enrolled: Reporting institution
- Transferred & Enrolled: Other Institution
- Current Status Unknown

APPENDIX E
NORTHWESTERN OKLAHOMA STATE UNIVERSITY
ACCESS, PROGRESS, GRADUATION METRICS

Enrollment: Summer - Fall - Spring (UDS Reporting Method)	14-15	15-16	16-17
FTE	1831	1788	1799
Total Headcount	2602	2590	2621
Student Credit Hours	54301	52968	53257
First Time Freshmen	452	422	465
First Time Full-time Freshmen	420	374	417
Retention Rates - Fall to Fall	14-15	15-16	16-17
First Time Freshmen	52.6%	52.2%	51.4%
First Time Full-time Freshmen	53.5%	54.3%	53.7%
Graduation Rate/Degrees Granted - full-time fall status	14-15	15-16	16-17
Graduation Rates	23.3%	26.4%	27.4%
Certificates	0	33	32
Associates	0	0	0
Bachelors	310	315	350
Master	46	44	53
Doctoral	0	0	0
Education Programs	14-15	15-16	16-17
Number of Degree Programs	41	41	41
Number of Accredited Programs	4	4	4
Gained or Lost Accreditation?	no	no	no
Gateway Courses	14-15	15-16	16-17
Gateway Course Enrollment-MATH	271	244	261
Gateway Completion % - MATH	90.8%	87.10%	91.70%
Gateway Course Enrollment-ENGL	341	344	372
Gateway Completion % - ENGL	93.3%	92.9%	95.0%

FY17 Business Metrics

		Metric	NACUBO Target	NWOSU
Data Date	Report Date	Measures of Resource Sufficiency and Flexibility		
June 30	November	Primary reserve (Unrestricted + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Expenses)	0.40	0.68
June 30	November	Days of cash on hand (Total cash+cash equivalents+short term investments/Daily Op Expense Avg (365 days))	> 80	120.82
June 30	November	Current ratio (Total Current Assets/Total Current Liabilities)	> 2	2.91
June 30	November	Unrestricted funds ratio (Unrestricted net assets/Total net assets)	none	19.18%
Measures of Resource Management, including debt				
June 30	November	CFI	> 2	2.84
June 30	November	Viability (Unrestricted + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Long-term Debt (Bonds, Notes & Capital Leases)	none	0.90
June 30	November	Debt burden (Annual Principal and Interest Payments (debt service)/(Operating expenses + Non-Operating expenses) – Depreciation expense + Principal payments made on Capital Debt and Leases	< 7 %	4.33%
Measures of Asset Performance and Management				
June 30	November	Return on total net assets (Change in Total Net Assets + Net Pension Liability & Related Deferrals (CY – PY)/Total Net Assets + Net Pension Liability & Related Deferrals (beginning of year)	3% to 4%	1.03%
Measures of Operating Performance				
June 30	November	Net operating revenues (Operating income (loss) + net Nonoperating revenues (expenses)/Operating revenues + Nonoperating revenues)	2% to 4%	0.23%
June 30	November	Gross tuition contribution ratio (LY)	< 60%	62.64%
June 30	November	State appropriations contribution ratio (LY)	none	32.72%
June 30	November	Budget impact of credit hour production	over (under)	\$ 254,305

APPENDIX F
SOUTHEASTERN OKLAHOMA STATE UNIVERSITY
 Student Achievement Measure: **Southeastern Oklahoma State University**
<http://studentachievementmeasure.org/participants/207847>

Southeastern Oklahoma State University

Southeastern Oklahoma State University provides an environment of academic excellence that enables students to reach their highest potential. By having personal access to excellent teaching, challenging academic programs, and extracurricular experiences, students will develop skills and habits that promote values for career preparation, responsible citizenship, and lifelong learning.

Website:

www.se.edu

Email:

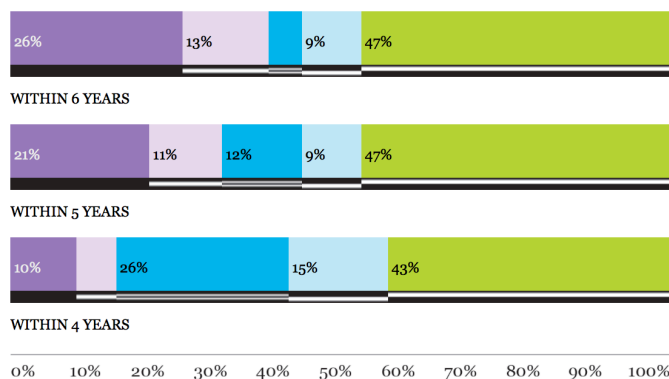
BACHELOR'S MODEL

First-Time Full-Time

First-Time Full-Time Students Starting Fall 2010

Number of students: 643

roll over each bar for detail data



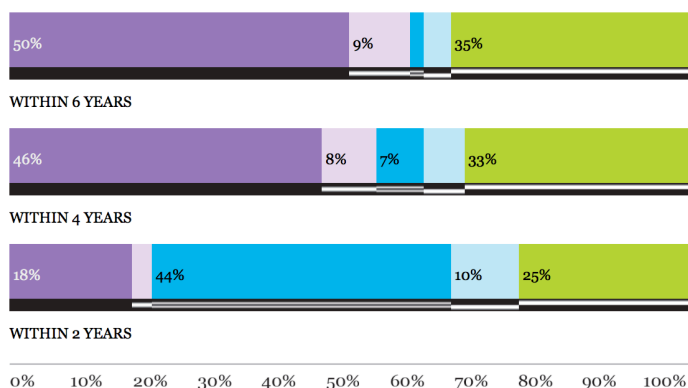
Graduated: Reporting institution
 Transferred & Graduated: Other Institution
 Enrolled: Reporting institution
 Transferred & Enrolled: Other Institution
 Current Status Unknown

Full-Time Transfer

Full-Time Transfer Students Starting Fall 2010

Number of students: 292

roll over each bar for detail data



Graduated: Reporting institution
 Transferred & Graduated: Other Institution
 Enrolled: Reporting institution
 Transferred & Enrolled: Other Institution
 Current Status Unknown

APPENDIX F
SOUTHEASTERN OKLAHOMA STATE UNIVERSITY
ACCESS, PROGRESS, GRADUATION METRICS

Enrollment Information	14-15	15-16	16-17
FTE	3196	3076	3055
Total Headcount	4701	4589	4631
Total Headcount (Fall)	3878	3754	3725
Student Credit Hours	94251	90148	89261
First Time Freshmen (Fall)	500	470	516
First Time Full-time Freshmen	486	442	501
Retention Rates	14-15	15-16	16-17
First Time Freshmen	63%	60%	53%
First Time Full-time Freshmen	64%	61%	55%
	<i>F13 to F14</i>	<i>F14 to F15</i>	<i>F15 to F16</i>
Graduation Rate/Degrees Granted	14-15	15-16	16-17
Graduation Rates	29%	29%	25%
Certificates	--	--	--
Associates	--	--	--
Bachelors	655	664	638
Master	139	178	206
Doctoral	--	--	--
Education Programs	14-15	15-16	16-17
Number of Degree Programs	54	52	52
Number of Accredited Programs	28	27	26
Gained or Lost Accreditation?	No	No	No
Gateway Courses	14-15	15-16	16-17
Gateway Course Enrollment-MATH	669	597	624
Gateway Completion % - MATH	73%	73%	78%
Gateway Course Enrollment-ENGL	539	502	541
Gateway Completion % - ENGL	80%	80%	82%

FY17 Business Metrics

Data Date	Report Date	Metric	NACUBO Target	SEOSU
Measures of Resource Sufficiency and Flexibility				
June 30	November	Primary reserve (Unrestricted + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Expenses)	0.40	0.40
June 30	November	Days of cash on hand (Total cash+cash equivalents+short term investments/Daily Op Expense Avg (365 days))	> 80	82.84
June 30	November	Current ratio (Total Current Assets/Total Current Liabilities)	> 2	1.76
June 30	November	Unrestricted funds ratio (Unrestricted net assets/Total net assets)	none	20.21%
Measures of Resource Management, including debt				
June 30	November	CFI	> 2	3.2
June 30	November	Viability (Unrestricted + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Long-term Debt (Bonds, Notes & Capital Leases)	none	0.30
June 30	November	Debt burden (Annual Principal and Interest Payments (debt service)/(Operating expenses + Non-Operating expenses) – Depreciation expense + Principal payments made on Capital Debt and Leases	< 7 %	6.14%
Measures of Asset Performance and Management				
June 30	November	Return on total net assets (Change in Total Net Assets + Net Pension Liability & Related Deferrals (CY – PY)/Total Net Assets + Net Pension Liability & Related Deferrals (beginning of year)	3% to 4%	1.70%
Measures of Operating Performance				
June 30	November	Net operating revenues (Operating income (loss) + net Nonoperating revenues (expenses)/Operating revenues + Nonoperating revenues)	2% to 4%	0.80%
June 30	November	Gross tuition contribution ratio (LY)	< 60%	64.1%
June 30	November	State appropriations contribution ratio (LY)	none	34.56%
June 30	November	Budget impact of credit hour production	over (under)	\$ (3,494.89)

APPENDIX G

SOUTHWESTERN OKLAHOMA STATE UNIVERSITY

Student Achievement Measure: **Southwestern Oklahoma State University**
<http://studentachievementmeasure.org/participants/207865>

Southwestern Oklahoma State University

The mission of Southwestern Oklahoma State University, a member of the Regional University System of Oklahoma, is to provide educational opportunities, research, scholarly and creative activities, and service in a safe, accessible, nurturing learning environment that meets the needs of the state and region and contributes to the educational, economic, and cultural environment. SWOSU provides traditionally strong programs of study leading to a variety of degrees, from associate to doctoral degrees. The University's areas of study, nationally accredited programs, general education curriculum, service and experiential learning activities, and participation in student activities and organizations provide students with opportunities to obtain skills, knowledge, and cultural appreciation that promote achievement by students and alumni.

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Email:

diane.fitzsimmons@swosu.edu

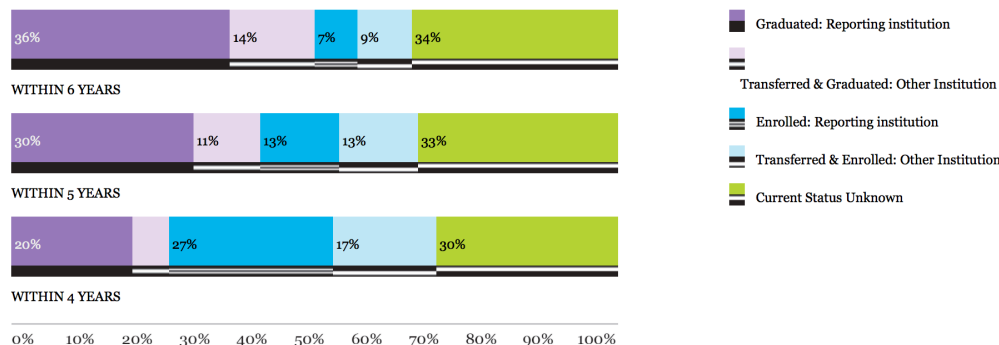
BACHELOR'S MODEL

First-Time Full-Time

First-Time Full-Time Students Starting Fall 2010

Number of students: 718

roll over each bar for detail data

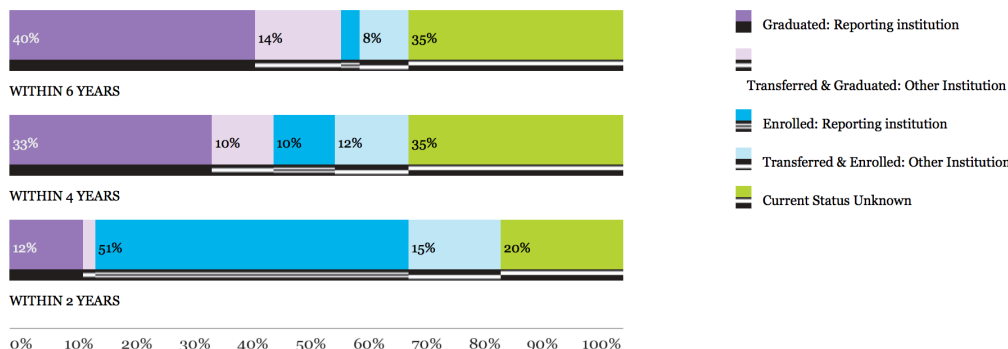


Full-Time Transfer

Full-Time Transfer Students Starting Fall 2010

Number of students: 306

roll over each bar for detail data



APPENDIX G
SOUTHWESTERN OKLAHOMA STATE UNIVERSITY
ACCESS, PROGRESS, GRADUATION METRICS

Enrollment Information	14-15	15-16	16-17	
FTE (Academic Year)	4,492	4,609	4,810	OSRHE Headcount and Full-Time Equivalent for Class Divisions for ALL Semesters for Academic Year 2015-16 (www.okeis.org) or IPEDS
Total Headcount (Academic Year)	5,907	6,074	6,274	OSRHE Headcount and Full-Time Equivalent for Class Divisions for ALL Semesters for Academic Year 2015-16 (www.okeis.org) or IPEDS
Total Headcount (Fall)	4,994	5,113	5,320	UDS Record S Fall Semester
Student Credit Hours (Academic Year)	130,057	133,585	139,312	OSRHE Headcount and Full-Time Equivalent for Class Divisions for ALL Semesters for Academic Year 2015-16 (www.okeis.org)
First-Time Freshmen (Fall)	914	956	990	IPEDS Fall Enrollment
First-Time, Full-time Freshmen (Fall)	896	939	971	IPEDS Fall Enrollment

Retention Rates	14-15	15-16	16-17	
First-Time Freshmen	62%	65%	62%	OIE Calculations
First-Time, Full-time Freshmen	66%	69%	66%	IPEDS Fall Enrollment To calculate the 16-17 figures, 10th-day figures were used. Methodology is to use end-of-semester.

*won't have official IPEDS number until April 18

Graduation Rate/Degrees Granted	14-15	15-16	16-17	
Graduation Rates %	33%	33%	35%	IPEDS GRS These rates are based on FTF cohorts from FA08, FA09, and FA10, bachelor-degree-seeking only. Other IPEDS graduation rates are available.
Certificates # (Undg & Grad)	0	1	4	IPEDS Completions These numbers are based on completers from SU14 through SP17.
Associates	162	169	156	IPEDS Completions
Bachelors #	626	697	745	IPEDS Completions
Master #	155	179	220	IPEDS Completions
Doctoral	76	82	73	IPEDS Completions

Education Programs	14-15	15-16	16-17	
Number of Degree Programs	71	71	71	OSRHE Degree Programs Inventory

Number of Accredited Programs	30	30	30	OSRHE Degree Program Review
Gained or Lost Accreditation?	0	0	0	OSRHE Degree Program Review

Gateway Courses (SU, FA, SP)	14-15	15-16	16-17	
Gateway Course Enrollment-MATH	1,108	1,128	1,180	MATH 1143 MATH CONCEPTS, MATH 1153 MATH APPLICATIONS, MATH 1513 COLLEGE ALGEBRA
Gateway Completion % - MATH	67%	69%	69%	
Gateway Course Enrollment-ENGL	823	932	903	ENGL 1113 Freshman Comp
Gateway Completion % - ENGL	79%	82%	82%	

UDS Record E Unsucessful Grade (5, 6, 7, 8, 9, W, N)

TRANSLATIONS FROM UDS

HANDBOOK:

5	F
6	W
7	AU
8	I
9	S
W	AW
N	No Grade

FY17 Business Metrics

Data Date	Report Date	Metric	NACUBO Target	SWOSU
Measures of Resource Sufficiency and Flexibility				
June 30	November	Primary reserve (Unrestricted) + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Expenses)	0.40	0.34
June 30	November	Days of cash on hand (Total cash+cash equivalents+short term investments/Daily Op Expense Avg (365 days))	> 80	125.22
June 30	November	Current ratio (Total Current Assets/Total Current Liabilities)	> 2	5.22
June 30	November	Unrestricted funds ratio (Unrestricted net assets/Total net assets)	none	21.13%
Measures of Resource Management, including debt				
June 30	November	CFI	> 2	2.66
June 30	November	Viability (Unrestricted) + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Long-term Debt (Bonds, Notes & Capital Leases)	none	0.78
June 30	November	Debt burden (Annual Principal and Interest Payments (debt service)/(Operating expenses + Non-Operating expenses) – Depreciation expense + Principal payments made on Capital Debt and Leases	< 7 %	6.10%
Measures of Asset Performance and Management				
June 30	November	Return on total net assets (Change in Total Net Assets + Net Pension Liability & Related Deferrals (CY – PY)/Total Net Assets + Net Pension Liability & Related Deferrals (beginning of year)	3% to 4%	8.21%
Measures of Operating Performance				
June 30	November	Net operating revenues (Operating income (loss) + net Nonoperating revenues (expenses)/Operating revenues + Nonoperating revenues)	2% to 4%	3.80%
June 30	November	Gross tuition contribution ratio (LY)	< 60%	65.55%
June 30	November	State appropriations contribution ratio (LY)	none	29.09%
June 30	November	Budget impact of credit hour production	over (under)	\$ 454,675

APPENDIX H

UNIVERSITY OF CENTRAL OKLAHOMA

Student Achievement Measure: **University of Central Oklahoma**
<http://studentachievementmeasure.org/participants/206941>

University of Central Oklahoma

The University of Central Oklahoma (UCO) exists to help students learn by providing transformative education experiences to students so that they may become productive, creative, ethical and engaged citizens and leaders serving our global community. UCO contributes to the intellectual, cultural, economic and social advancement of the communities and individuals it serves.



Website:
www.uco.edu

Email:

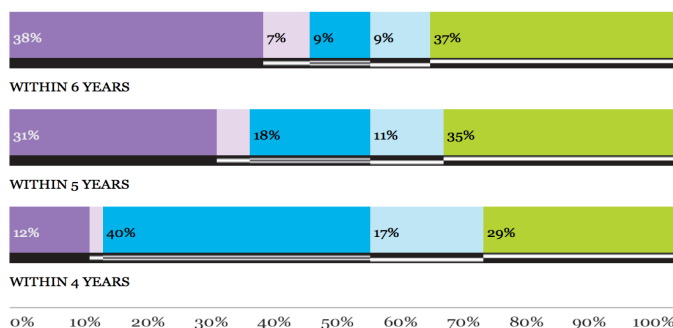
BACHELOR'S MODEL

First-Time Full-Time

First-Time Full-Time Students Starting Fall 2009

Number of students: 1,598

roll over each bar for detail data



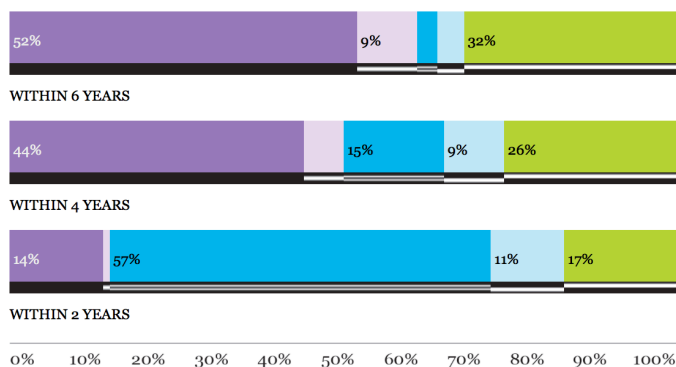
- Graduated: Reporting institution
- Transferred & Graduated: Other Institution
- Enrolled: Reporting institution
- Transferred & Enrolled: Other Institution
- Current Status Unknown

Full-Time Transfer

Full-Time Transfer Students Starting Fall 2009

Number of students: 1,072

roll over each bar for detail data



- Graduated: Reporting institution
- Transferred & Graduated: Other Institution
- Enrolled: Reporting institution
- Transferred & Enrolled: Other Institution
- Current Status Unknown

APPENDIX H
UNIVERSITY OF CENTRAL OKLAHOMA
ACCESS, PROGRESS, GRADUATION METRICS

FTE				
Total Headcount (Academic Year)				
Total Headcount (Fall)	16,869	16,918	16,437	IPEDS numbers are preferable
Student Credit Hours				
First Time Freshmen	2,049	2,371	2,222	
First Time Full-time Freshmen	1,959	2,239	2,152	
Retention Rates	14-15	15-16	16-17	this has to be calculated; not tracked elsewhere
First Time Freshmen				
First Time Full-time Freshmen	66%	62%	61%	
Graduation Rate/Degrees Granted	14-15	15-16	16-17	may want to specify which cohort year is needed IPEDS Completions has degrees awarded and the number of completers (headcount) so will need to specify which is needed
Graduation Rates	38%	39%	38%	
Certificates	0	0	22	
Associates	81	58	59	
Bachelors	2,498	2,608	2,626	
Master	547	540	526	
Doctoral	---	---	---	
Education Programs	14-15	15-16	16-17	
Number of Degree Programs	104	104	109	
Number of Accredited Programs				
Gained or Lost Accreditation?				
Gateway Courses	14-15	15-16	16-17	UDS Record S will take a little bit of time to consolidate
Gateway Course Enrollment-MATH	1,757	1,797	1,842	
Gateway Completion % - MATH	76%	71%	71%	
Gateway Course Enrollment-ENGL	2,051	2,215	2,191	
Gateway Completion % - ENGL	78%	82%	82%	

*Considers distinct student enrollment in Gateway course (Math 1513 & English 1113) during a given Academic Year (Summer, Fall & Spring terms combined) as of Official Census. Students earning a D or better grade were considered completions. Students making multiple attempts for the course during the Academic Year, but earning a D or better were counted as a completion.

FY17 Business Metrics

Data Date	Report Date	Metric	NACUBO Target	UCO
Measures of Resource Sufficiency and Flexibility				
June 30	November	Primary reserve (Unrestricted) + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Expenses)	0.40	0.39
June 30	November	Days of cash on hand (Total cash+cash equivalents+short term investments/Daily Op Expense Avg (365 days))	> 80	104.20
June 30	November	Current ratio (Total Current Assets/Total Current Liabilities)	> 2	5.24
June 30	November	Unrestricted funds ratio (Unrestricted net assets/Total net assets)	none	27.61%
Measures of Resource Management, including debt				
June 30	November	CFI	> 2	2.53
June 30	November	Viability (Unrestricted) + Expendable Net Assets + Net Pension Liability & Related Deferrals/Total Long-term Debt (Bonds, Notes & Capital Leases)	none	0.49
June 30	November	Debt burden (Annual Principal and Interest Payments (debt service)/(Operating expenses + Non-Operating expenses) – Depreciation expense + Principal payments made on Capital Debt and Leases	< 7 %	6.22%
Measures of Asset Performance and Management				
June 30	November	Return on total net assets (Change in Total Net Assets + Net Pension Liability & Related Deferrals (CY – PY)/Total Net Assets + Net Pension Liability & Related Deferrals (beginning of year)	3% to 4%	7.82%
Measures of Operating Performance				
June 30	November	Net operating revenues (Operating income (loss) + net Nonoperating revenues (expenses)/Operating revenues + Nonoperating revenues)	2% to 4%	4.01%
June 30	November	Gross tuition contribution ratio (LY)	< 60%	62.13%
June 30	November	State appropriations contribution ratio (LY)	none	23.50%
June 30	November	Budget impact of credit hour production	over (under)	\$ (3,724,025.00)

APPENDIX I MEASURING UPWARD SOCIAL MOBILITY

RUSO institutions have always been focused on a primary mission of teaching. This heritage extends back to our roots as State Normal Schools for the education of teachers. Throughout our curricular evolutions into the liberal arts, sciences, the humanities, and professional disciplines, our primary mission has remained unchanged: teaching and learning. Our emphasis has been to ensure that our graduates achieve their dreams by living fulfilling professional lives and happy personal lives. This primary emphasis on classroom teaching is supplemented by two other components.

First, our institutional research that advances knowledge is connected to a framework of direct application to society. This can be transported into the classroom for learning purposes. This RUSO perspective differs from basic, or bench, research that is conducted at doctoral research institutions. Research institutions focus conducting research through experiments, with lesser emphasis on transportability into the classroom.

Second, RUSO institutions support a culture of community engagement as a key mission ingredient. Engagement within our service areas may take the form of for-credit service-learning projects in which students participate in experienced-based learning under the direction of a faculty member, or through volunteerism through campus organizations to civic, charitable, or educational partners. The overall purpose is to create a commitment to service within our graduates. As AASCU institutions, our RUSO universities are “of this place” so as to impact the communities within their service regions

For the past 12 years, *Washington Monthly Magazine* has conducted an annual ranking of 1,860 higher education institutions for their success in achieving RUSO mission objectives of teaching, research, and community engagement.

<https://washingtonmonthly.com/2017college-guide>

The magazine’s analysis of institutions emphasizes: “Social Mobility (recruiting and graduating low-income students), Research (producing cutting-edge scholarship and PhDs), and Service (encouraging students to give something back to their country).”

“It’s our answer to *U.S. News & World Report*, which relies on crude and easily manipulated measures of wealth, exclusivity, and prestige to evaluate schools.” The *U.S. News* rankings have been criticized for decades by higher education institutions for its survey methodology. Although few students enrolling in RUSO institutions may place an emphasis on this ranking to make an enrollment decision, its longevity and the positioning of Ivies at the top of the list gives the listing a halo effect that confers prestige for prominence in the listings.

In contrast, *Washington Monthly* in its methodology generally excludes many elite institutions from its Top 25 ranking as it places greater merit on admitting and graduating first-generation, financially at-risk students. That is not the population served by the vast majority of Ivies, but it is very much a reflection of the RUSO student body.

Important additional differences for *Washington Monthly* is that it:

- Evenly weights all categories through easily decipherable criteria.
- Does not conduct “reputation” polls of presidents and admissions directors. These carry substantial weight in the *U.S. News* survey. The academic reputation of RUSO institutions, for example, in the *U.S. News* survey are placed in the West are achieved by surveying presidents and admissions directors of 141 institutions in the states of Idaho, Montana, California, Oregon, Washington, Wyoming, Nevada, Colorado, Arizona, New Mexico, Texas, and Utah. RUSO institutions have no formal connection to most of these institutions through regional accrediting bodies, athletics, or any other relationship that would produce the familiarity with our institutions to accurately assess our reputation for excellence. <https://www.usnews.com/best-colleges/rankings/regional-universities>.
- Does not provide credit within the rankings for students who are turned away for admissions, with greater credit awarded for a greater rejection rate.
- Unlike *U.S. News*, it does not reward alumni donations and the size of the foundation corpus. Doctoral institutions with programs in law, medicine, and dentistry generate significant donations. RUSO does not produce these categories of graduates who can provide substantial largesse.

Instead, *Washington Monthly* relies on traditional data sets. This includes such areas as a college’s graduation rate (from IPEDS). It also compares the reported graduation rate to a predicted graduation rate for Pell grant recipients and first-generation students, the percentage of students with student loans, the admission rate, the racial, ethnic, and gender makeup of the student body, the number of full and part-time students, and whether a college is primarily residential or commuter.

In the “Research” category as it applies to RUSO-equivalent universities, the survey emphasizes graduates from these institutions who go on to pursue doctorates. It does not apply the same criteria that it utilizes for those institutions whose primary mission is research.

In the “Service” category it includes student participation in ROTC programs, and after graduation such as the Peace Corps, and the AmeriCorps Award for those completing national volunteer service to non-profits in such areas as public safety, education, health care, or the environment. Also considered is institutional data on community service reported to the Corporation for National and Community Service.

This survey relies on three-year data trends for posting its ranking.

Recommendation: the RUSO Dashboard Work Group review several years of institutional rankings and their consistency. This can help to determine whether the methodology employed for the rankings provides a useful social accountability tool to measure RUSO institutions’ fulfilment of their mission. The *Washington Monthly* Rankings can be evaluated to conclude if they should be used in their entirety, or if some metrics may be captured to successfully assess the upward social mobility of RUSO students that will improve the future of Oklahoma through an educated populace.

Here are the 2017 *Washington Monthly Magazine* RUSO standings for 632 National Masters' Universities

Rank	Name	Social mobility rank	Research rank	Service rank	Net price of attendance for families below \$75,000 income	6-year graduation rate	Predicted grad rate	% of students receiving Pell Grants	Predicted % Pell based on ACT/SAT and admit rates	% of student first-generation
165	Southeastern OK State Univ. (OK)*	86	408	222	7182	30	23	47	41	52
178	University of Central Oklahoma (OK)*	258	319	69	10185	37	40	35	37	39
182	Northeastern State University (OK)*	177	244	187	6785	29	29	50	38	43
230	East Central University (OK)*	89	350	491	6234	34	32	46	38	49
291	Northwestern OK State Univ. (OK)*	272	387	206	6051	29	36	37	48	47
432	Southwestern OK State Univ. (OK)*	405	207	496	9206	32	42	38	36	44

Best Bang for the Buck

In its 2017 rankings, *Washington Monthly* initiated a new component: Best Bang for the Buck. RUSO is ranked in the South region that includes 199 Regional Universities. *Washington Monthly* notes the ranking is based on “the extent to which they charge students who aren’t rich a reasonable price for quality education that will advance them in their careers.” This category generally assesses efforts to enroll low income students, help them to graduate, and assists students in finding good jobs. Best Bang relies heavily on data collected for the White House College Scorecard, and also on the social mobility component of the national listings cited above in this Appendix. Our assessment of this ranking will also be influenced by those components that *Washington Monthly* draws from these sources.

Rank	Name	Graduation rate rank	Pell performance rank	First-gen performance rank	Earnings performance rank	Net price of attendance for families below \$75,000 income	Predicted repayment rate rank
18	Southeastern OK State Univ. (OK)*	160	86	22	145	7182	13
19	East Central University (OK)*	134	65	25	38	6234	147
38	Northeastern State University (OK)*	165	41	78	59	6785	162
72	University of Central Oklahoma (OK)*	118	154	115	44	10185	101
79	Northwestern OK State Univ. (OK)*	166	193	87	84	6051	61
123	Southwestern OK State Univ. (OK)*	150	124	61	151	9206	118