

2/24/99 Distribution

**Staff Recommendations:
Performance Funding Revisions**

The following are recommendations for modifications to performance funding. These recommendations are presented under headings that correspond to the four topics for the breakout sessions at the Performance Funding Colloquium. They also respond directly to concerns and suggestions raised at the Colloquium, at more than twenty other meetings with institutional representatives and other interested parties, and at discussion sessions focused on the staff concept paper distributed on 1/6/99. The concepts and recommendations, though presented under separate headings, interrelate; suggested revisions under item II, for example, impact on items IIIA and IIIB.

I. Measures

Goal: Have measures that are valid and sensitive to differences among sectors and institutions while not being overly complex or time consuming to report on.

Considerations:

- 1) Measures should be reviewed on the basis of feedback from various meetings including the Colloquium to identify those in need of modification during the current year, those in need of review for possible future modification, and those that appear to be satisfactory as they currently are phrased.
- 2) Selected measures and indicators should be considered for possible combining to reduce overlap and increase internal consistency.
- 3) Some measures may need to be differentiated across sectors to better reflect the different missions of each sector.
- 4) Measures should reflect highly specialized missions of institutions, such as the medical mission of MUSC.
- 5) Measures should be reviewed to see if some should be expressed as three-year rolling averages rather than annual figures.
- 6) Measures should be reviewed to see if they need to be reported on annually, or if a different reporting cycle such as every three or five years might be more appropriate.

Recommendation I:

Modify existing measures, criteria, and schedules as reflected in Attachment I.

Discussion: The proposed changes address measures about which the most concerns have been expressed. The number of changes has been limited by the realization that too many alterations in measures and definitions at one time can create additional problems with data collection and with consistency across years. Specific changes recommended for implementation are discussed in Attachment I. Attachment II lists the indicators, notes whether each is criterion-referenced or is to be benchmarked by the institution, and provides a summary of information related to performance and evaluation. Attachment II also contains suggestions of measures that might be evaluated on a schedule other than annually. These suggestions are not part of the formal staff recommendations for consideration by the Commission on Higher Education at this time.

II. Institutional and Sector Benchmarks

Goal: Reduce the burden of annual benchmark setting and the pressure to propose low benchmarks, while allowing for normal fluctuations in data and for greater emphasis on achieving and maintaining overall quality, as opposed to showing annual improvement.

Considerations:

- 1) Institutional benchmarks should be proposed and approved in ranges determined statistically for each indicator by sector to allow for fluctuations in data.
- 2) Some institutional benchmarks should be set for longer periods than just a single year.
- 3) Substantially fewer indicators should be benchmarked each year.
- 4) Sector benchmarks for some indicators should be reconsidered to recognize maximum levels of performance beyond which an institution should not be encouraged to move.
- 5) Straight performance-to-score scales should be considered for some appropriate indicators.
- 6) Measures should be reviewed to see if on some a sufficient performance level should relieve the institution of reporting responsibility for a specified period of time.
- 7) Peer data should be used, when available, for the sector benchmarks.
- 8) Other ways to reduce the incentive for an institution to propose a benchmark lower than its anticipated performance should be explored.

Recommendation II:

Create two categories of indicators, as displayed in Attachment I – those for which the institution proposes benchmarks, subject to the approval of the Commission on Higher Education, and those for which criteria are established by the Commission on Higher Education. Benchmarks in the first category will be proposed by the institutions, subject to approval by the Commission on Higher Education. For indicators in this category, appropriate ranges will be determined within which performance will be scored as achieving the benchmark. Benchmarks in the second category will be stated as criteria required to be met for an institution to receive a certain score.

Discussion: The suggested change puts more emphasis on the attainment and maintenance of quality through those indicators which are criterion referenced, while still allowing for indicators which are based on institutionally proposed benchmarks, which generally reward progress more than attainment of quality. Using ranges for the institutionally proposed benchmarks takes into consideration normal data fluctuations from year to year. Some indicators do not need to be measured annually; these are indicated in Attachment I, Section 2. The total number of indicators that require annual benchmarking is substantially reduced.

III. Scoring

Goal: Simplify, more clearly define, and make less subjective the points on the rating scale while more clearly expressing the degree to which an institution has met benchmarks.

Considerations:

- 1) The scores of "6" and "0" should be deleted because of their subjectivity and the tendency to have scores of "6" inflate the total scores for institutions.
- 2) The rating scale should be redefined for greater clarity and simplicity.
- 3) Consideration should be given to using fewer points on the scoring scale.
- 4) The overall percentage score for an institution should be reassessed to see if there is a better way to express an institution's success in reaching goals.
- 5) Consideration should be given to grouping institutions in terms of overall level of performance rather than differentiating institutions in percentage point increments.
- 6) The overall score for the institution should reflect the extent to which it has met its goals.
- 7) The magnification of an institution's score, which occurs under the current system of converting scores on indicators to an overall percentage, should be eliminated.

Recommendation IIIA:

Modify the current five point rating scale used for scoring each indicator as displayed below, using three categories of performance.

- 3 **Exceeds** (performance exceeds institutional benchmark, meets or exceeds sector benchmark, or corresponds to appropriate criteria for "exceeds")
- 2 **Achieves** (performance meets institutional benchmark or corresponds to appropriate criteria for "achieves")
- 1 **Does Not Achieve** (performance does not meet institutional benchmark, corresponds to appropriate criteria for "Does Not Achieve," or represents a "No" on a "Yes/No" indicator)

Discussion: The suggested revision would offer the advantages of a more clearly defined scale, reflecting clearly whether or not the institution has met its goals. "Yes/No" indicators would be scored so that a "Yes" would be a check-off, while a "No" would be scored as "Does Not Achieve." This recommendation recognizes that by year four of performance funding a "Yes" would indicate expected compliance and should no longer be scored as though it represented achievement. Failure to be in compliance, on the other hand, ought to be reflected in the score.

Recommendation IIIB:

The method of determining and displaying the total score for an institution will be modified to reflect the extent to which an institution has met its goals on the indicators, as expressed in five overall categories:

Substantially Exceeds Standards	(2.85 – 3.00)
Exceeds Standards	(2.60 – 2.84)
Achieves Standards	(2.00 – 2.59)
Does Not Achieve Standards	(1.45 – 1.99)
Substantially Does Not Achieve Standards	(1.00 – 1.44)

Note:

The recommended scale for the total score for the institution will be revisited after the rating process for year three is completed, in case adjustments are needed for year four of performance funding.

Discussion: The recommended revision provides for the ratings on each indicator to be averaged to produce a total score in five categories. This revision addresses a problem in the current system, which magnifies a five-point rating scale for each indicator to a scale that could be, in theory, as much as 100 points for an institution's total score. In practice, the most recent scoring process produced a range of scores of twenty points. If these scores were applied to 100 % of the funding, one institution could be impacted by as much as 10 or 15 percent of its state appropriation, which is too great an impact in a single year. Applying the five-category system, rather than the percentage system, provides a way to keep the financial impact, whether it is positive or negative, within reasonable levels. At the same time, using five categories in the institution's total score has advantages over using only three categories. Five categories provide the potential for a greater degree of differentiation so that an institution that scores especially high on a number of indicators can be recognized for doing so. The rating scale reflects the fact that institutions' scores may tend to be higher than a normal distribution would yield. This is the case due to the number of scores of "3" an institution receives for compliance with best practices, as well as meeting sector benchmarks, and infrequency at which institutions score below "Achieves" on benchmarks which they propose. It is important that the performance scale used to produce an institution's overall rating recognize the existing bias toward high scores on individual indicators. Because there is not a normal distribution of scores on individual indicators, the scale used to produce the total score does not reflect a normal distribution.

These recommended revisions address several other difficulties caused by the current system of producing a total score for the institution. Under the current system one institution's allocation depends heavily on all the other institutions' scores within the sector. As a result, an institution may improve its score from one year to the next, yet receive less funding because of factors over which it has no control. For this reason, under the current system, an institution's allocation cannot be reasonably estimated before the rating process is completed, even though its performance level is known. Because the Commission on Higher Education does not complete the rating process until May, little time is allowed for institutions to adjust budgets to accommodate shifts in funding for the next fiscal year. The modification recommended here, in combination with other changes in scoring and measures, would allow institutions to be able to anticipate, with reasonable accuracy, a level of funding based on their performance well before the Commission finalizes ratings.

Finally, it should be noted that the recommended revisions clearly provide what the legislation calls for in Act 359 of 1996. The legislation calls for the allocating funds to the colleges and universities based on levels of performance that reflect "institutions meeting the standards of achievement, . . . institutions exceeding the standards of achievement, and . . . institutions which do not meet the standards of achievement."

IV. Allocation

Goal: Provide an allocation process that, whatever the means of determining financial need for institutions and whatever the level of funding from the General Assembly, would reward high performance and provide disincentives for poor performance while ensuring reasonable stability and predictability of budgets from year to year.

Considerations:

- 1) There should be differences in funding levels depending on performance so that there are clear incentives for strong performance and disincentives for performing poorly.
- 2) The pool of funding for performance improvement should be maintained as a way to assist institutions in improving their performance.
- 3) The allocation methodology should work regardless of the level of funding from the General Assembly in a given year, including years when there is an overall decrease in funding and years in which there is a large increase in funding.
- 4) The relative levels of funding for different levels of performance, subject to final determination of the higher education budget in the General Assembly, should be known by the institutions before the scoring takes place.
- 5) The "volatility" of allocations should be held within reasonable limits to avoid drastic swings in funding.
- 6) To the extent possible, it is desirable to have funds that institutions can earn, while minimizing the extent to which every dollar earned by one institution is another institution's loss.
- 7) The need for increased funding for higher education overall remains a dominant concern.

Recommendation IV:

Funds will be allocated to provide incentives for high performance and disincentives for low performance as described below:

Incentives. Institutions will receive incentive funding of up to 1%, 3%, and 5% above their allocation if their total score falls within the "Achieves," "Exceeds," or "Substantially Exceeds" category, respectively. (If there are residual dollars within the Performance Improvement Pool after high performing institutions have drawn their incentive funding, the remaining incentive funds will be distributed within the sector to the institutions that score in the "Achieves," "Exceeds," "Substantially Exceeds" categories, proportionally to their share of the MRR weighted by their performance.)

Disincentives. Institutions which score in the "Does Not Achieve" and "Substantially Does Not Achieve" categories will receive disincentives of 3% and 5% of their allocation, respectively.

Funding for incentives will be derived from the Performance Incentive Pool, maintained by sector as described below:

Performance Incentive Pool. Funds for performance incentives will be derived from three sources:

- 1) One-half of new funds (higher education appropriation for the new year in excess of the appropriation for the current year);
- 2) 1.75% of the allocation to the institutions (including current year plus one-half of new year appropriation distributed by the MRR); and
- 3) funds derived from institutions within the sector that score in the "Does Not Meet" or "Substantially Does Not Meet" categories.

Funds in the Performance Incentive Pool stay within sectors.

Funds will also be set aside for the Performance Improvement Pool as described below:

Performance Improvement Pool. This pool is derived from 0.25% of the allocation to the institutions and are available to be awarded, based on a review of proposals, to institutions in the "Achieves," "Does Not Achieve," and Substantially Does Not Achieve" categories.

It is further recommended that the allocation methodology outlined above be reviewed after the current year's rating process has been completed so that adjustments can be considered for the following year's rating process.

Discussion: These recommendations address the major areas of concern related to allocation of funding. With these modifications, unlike the current system, it is possible for an institution to project its budget assuming it will score in the "Achieved" category, subject to the extent of funding actually provided by the General Assembly for higher education. Since the disincentives are established as maximum percentage deductions, those possibilities can also be taken into account as institutions plan their budgets. Also, the approximate amount of incentive funding can be estimated, contingent on the number of other institutions within the sector that perform at a high level and the total amount of the higher education appropriation. At the same time, the allocation methodology has the advantage of reducing the extreme swings of funding that could occur if the current system were applied to all the funding. The methodology presented in the recommendation functions independently of possible modifications to the MRR and can be applied regardless of the amount of new funding provided for higher education in a given year. It accomplishes the major goal of performance funding: to provide clear incentives and disincentives for institutions based on performance. The awarding of disincentives is moderated by the fact that all institutions share proportionally in one-half of new money.

Attachment I: Measures and Criteria

1B. Curriculum Offered to Achieve Mission

Recommendation: Add sub-part 3, percentage receiving full "approval" in most recent Commission on Higher Education program review, and score based on criteria. Programs included are those reviewed in the 1995-96 academic year and subsequent to that year. This measure will be reviewed again next year. The measure and criteria are stated below:

Using the institution's most recently approved mission statement, curricula offered to achieve that mission will be measured as the percentage of degree programs which:

- 1) are appropriate to the degree-level authorized for the institution by the Commission on Higher Education and Act 359 of 1996, and
- 2) support the institution's goals, purpose, and objectives as defined in the approved mission statement.
- 3) have received full "approval" in the most recent Commission on Higher Education review of that program.

Criteria:

100%

95-99% or no more than one not approved

94% and below

Exceeds

Achieves

Does Not Achieve

Discussion: This change adds a quality factor to a measure that otherwise is a check-off of programs. The use of criteria for scoring relieves the burden on institutions and the Commission of going through an unnecessary process of proposing approving benchmarks. After discussions at the Planning and Assessment Committee meeting on February 17, 1999, the reference to "commendations" in program reviews has been deleted and can be considered further at a later date.

2A. Academic and Other Credentials of Professors and Instructors

Recommendation: Change Part 2 of this indicator so that it measures faculty who hold terminal degrees, as recognized by the Southern Association of Colleges and Schools (SACS), in their primary teaching area. The revised measure is shown below:

The quality of the faculty as represented by the academic and others credentials of professors and instructors is to be measured as:

- 1) the percent of all headcount faculty who teach undergraduate courses and who meet the criteria for faculty credentials of the Southern Association of Colleges and Schools (SACS);
- 2) the percent all headcount and the percent of all full time faculty teaching undergraduate courses who have terminal degrees as defined by SACS in their primary teaching area, or in the case of the technical college system, those who exceed minimum technical competence criteria.

Discussion: This revision corrects an unintended consequence of the phrasing of the current measure. The current measure excludes terminal degrees such as MFA and MSW because they do not "exceed," which is particularly disadvantageous for those institutions with strong programs in areas such as the fine arts and social work. Also, for this part of the measure, it is appropriate to look at both full-time faculty and headcount faculty. The provision for the technical college system for exceeding minimum technical competence criteria, as defined by the SBTCE, is retained.

2B. Performance Review System for Faculty to include Student and Peer Evaluations

Recommendation: Change the measure for indicator 2B from one that is benchmarked by institutions to one that is criterion-referenced, using the following criteria:

Criteria:

11/11

10/11

9 or fewer/11

Exceeds

Achieves

Does Not Achieve

Discussion: This change relieves the need to go through the institutional benchmarking and approval process. When the measure was first being implemented in 1997, institutional benchmarking was appropriate since institutions were at different points in their internal processes of approving performance review policies. Since institutions have had time to develop and approve policies, and since the measure is the same for all institutions, it should not be necessary to have different benchmarks for different institutions at this point.

2C Post Tenure Review for Tenured Faculty

Recommendation: Reduce from 12 to 9 the items in the best practices document, with the current items 1, 2, and 4 being stated as "Guiding Principles," and use criterion referenced scoring.

Criteria:

9/9

8/9

7 or fewer/9

Exceeds

Achieves

Does Not Achieve

Discussion: Since items numbered 1, 2, and 4 in the Best Practices document for this measure are not directly measurable and serve instead as general guidelines, these three items will be presented as "Guiding Principles." The remaining items in the Best Practices document, renumbered appropriately, would then follow. With the three "Guiding Principles" removed from the list of criteria, the number of criteria changes from 12 to 9. This modification does not change the substance of the measure, but will clarify it as the Commission staff works with institutions to verify reported data. The change to criterion for scoring is in line with the recommended changes in 2B, Performance Review System for Faculty, and has the same advantages in terms of reducing the need for institutional benchmarking and approval.

2D. Compensation of Faculty

Recommendation: Change this measure from one overall average for faculty salaries to averages displayed by the ranks of instructor, assistant professor, associate professor, and professor, with the sector benchmark being the national peer average by rank. The measure would be stated:

Average faculty salary by rank (instructor, assistant professor, associate professor, professor)

Discussion: The current measure, because it is an overall average dollar expenditure, is subject to fluctuations depending on which faculty leave the institution from year to year and whether or not they are replaced at lower ranks, and thus lower salaries. The use of average salaries by rank accommodates situations such as replacing a retiring full professor with an assistant professor at a lower salary level. This change has no impact on the technical colleges, which do not have a system of faculty rank.

2F. Community and Public Service Activities of the Faculty for which No Extra Compensation Is Paid

Recommendation: Combine this measure with the measure for Indicator 2B, Performance Review System for Faculty, to create a single measure and score for the combined indicators.

Discussion: This measure is incorporated in the Best Practices document for indicator 2B, Performance Review System for Faculty to Include Student and Peer Evaluations. The "Best Practices" document stipulates that an institution's annual performance review include evaluation of "service to the community." Thus, Indicator 2F can be addressed in combination with Indicator 2B, as part of the required best practices that the institution complies with, with the definition of community service refined by the institution and measured by the institution as part of the annual review of faculty.

3A. Class Size and Student/Teacher Ratios

Recommendation: Revise the ranges for class size and student faculty ratios and add measures for large class size, as indicated below, scored based on criteria as "meets" or "does not meet":

The extent to which the institution's class size and student/teacher ratio meet Commission on Higher Education approved ranges for the following three factors:

- 1A) the average class size for lower and upper division courses;
- 1B) the percentage of large classes;
- 2) the ratio of FTE students to FTE teaching faculty.

Criteria:

Within ranges on all three parts	Exceeds
Within ranges on two of three parts	Achieves
Within ranges on one of three parts	Does Not Achieve

Ranges for Part 1A, Average Class Size

Sector	Lower Division	Upper Division
Research Sector	25-35	20-30
Teaching University	20-30	15-25
Regional Campuses	15-25	"
Technical Colleges	15-25	N/A

*recommendation that upper division range for regional campuses be established, after data review, for scoring in 2000-2001.

Ranges for Part 1B, Large Classes

Undergraduate lecture sections of 50 or more*	0 - 20%
Lower division lecture sections of 100 or more*	0 - 5%

*Lecture sections without a required lab or discussion section that is within the upper limit of the range for class size for Part 1.

Ranges for Part 2, Ratio of FTE Students to FTE Faculty

Sector	Ratio to 1
Research Sector	14-19 (N/A for medical education)
Teaching University	14-19
Regional Campuses	14-19
Technical Colleges	14-19

Discussion: These recommended changes improve a measure that has generated considerable debate and been time consuming in the process of proposing and approving benchmarks. The existing ranges have been questioned since they are average figures that clearly should not apply to all disciplines. Because different institutions have different mixes of disciplines, average class sizes should be different for different institutions. The current scoring system when applied to the ranges has resulted in significant swings in score based on only a slight change in average class size. The recommended changes provide broader ranges of performance that are more inclusive of institutions and allow for more variation based on mix of programs than the current, narrower ranges. By basing the scoring on criteria, rather than benchmarking, the dramatic scoring changes based on small changes in data have been reduced. By adding a part to the measure related to large classes, the measure better addresses a major concern with class size.

3D. Accreditation of Degree-Granting Programs

Recommendation: Rather than continuing to have this measure benchmarked, a criteria referenced scoring scale would be used. For funding purposes only, a program would be understood as accredited if it is currently accredited or if the institution is on schedule for an accreditation visit such that accreditation is expected by April 2002, five years after the adoption of this measure by the Commission on Higher Education. The phrasing of the measure remains the same. The scoring scale would be as follows:

100%	Exceeds
90% - 99% (or all but one program)	Meets
89% or below (or all but two programs)	Does not meet

Discussion: This recommendation removes the burden of benchmarking and bases the scoring on the performance level. The provision allowing an institution three years to complete accreditation is consistent with past practices in performance funding and provides incentives for institutions to move expeditiously toward accreditation of all programs while recognizing that it takes time to go through the accreditation process. Allowing three years beyond 1999 provides a total of five years since the initial adoption of this measure by CHE in the fall of 1996.

5A. Percentage of Administrative Costs as Compared to Academic Costs

Recommendation: Rather than two ratios this measure will be expressed as a single ratio:

The ratio of administrative costs to the amount of academic costs expressed as a percentage

(Note: The sector benchmarks will be adjusted to reflect the most recent available national data. Definitions currently applicable to this measure will apply in the revised phrasing of the measure. "Administrative costs" is defined as institutional support; "academic costs" is defined as expenditures for instruction, research, academic support, and scholarships. Restricted funds are included for the research sector and excluded for other sectors. Fund transfers are excluded for all institutions.)

5D. Amount of General Overhead Costs

(Note: The sector benchmarks will be adjusted to reflect the most recent available national data.)

7A. Graduation Rates

Recommendation: For the technical college sector, include an additional part of the measure that shows the graduation rate excluding developmental students. This part of the measure would be:

Part 2: Rate 1, excluding students enrolled in two or more developmental courses during the first semester.

Discussion: The current definition includes all first time full time entering students regardless of whether or not they are enrolled in developmental courses that are required before the regular program courses begin. It is usually not possible for students taking developmental courses to graduate within two years at a technical college. Development course offerings are part of the mission of the technical colleges.

7B. Employment Rate for Graduates

7E. Number of Graduates that Continue their Education

Recommendation: Revise these two measures by combining them so that two otherwise contradictory measures can be reconciled:

- 1) Existence at the institution of a system for tracking graduates for employment and education information with a minimum response rate determined by the Commission on Higher Education. (For 1999-2000 and following, prerequisite to Part 2 and to a score of "Achieves" or "Exceeds")
- 2) Percent of graduates with AA/AS degrees or baccalaureate degrees who are either employed or enrolled at a more advanced educational level within a time frame determined by the Commission on Higher Education. (For 2000-2001 and following)
- 3) Percent of graduates employed within a time frame determined by the Commission on Higher Education.

Discussion: The proposed change would make these measures less contradictory than is currently the case. It also avoids some complications if continued use of the Employment Security Commission data becomes problematic. Parts 1 and 3 of the measure would be applicable in the 1999-2000 performance year. Part 2 would be applicable beginning in the 2000-2001 performance year. Part 3 would only be applicable when appropriate statewide survey information is available from the Employment Security Commission or other sources. By basing the rate graduates continue their education on data collected by the institutions through surveys, the problem of the limitations of existing CHE data is addressed. CHE data is limited to primarily to public South Carolina institutions, and for this reason the current measure reads "percentage of graduates who continue their education at a public in-state institution at a more advanced level." The current measure thus does not include students who continue their studies out of state, which affects some institutions more than others and does not provide an accurate picture of the extent to which students continue their education.

7C. Employer Feedback on Graduates Who Were Employed and not Employed

Recommendation: The current measure, like the measure on employment rates, depends on Employment Security Commission survey data and requires regular contracts with ESC and special legislative appropriations. The recommendation adds two parts to the measure that assures a source of data from the institutions and addresses employers' assessment of candidates for positions whom they did not hire:

- 1) The existence at the institution of a process for surveying employers who interview or hire prospective employees who are graduating or have graduated from the institution (applicable in 1999-2000, prerequisite to the second part and to a score of "Achieves" or "Exceeds");
- 2) Employers' level of satisfaction with graduates who are interviewed for jobs as reported on a standardized survey instrument in a common format as approved by the Commission on Higher Education or, in the case of the technical colleges, as approved by the SBTCE (applicable in 2000-2001);
- 3) The level of employers' satisfaction with employees as determined by a survey of employers.

Discussion: The recommended change provides a measure that addresses more fully what the legislation requires, which includes feedback on those who are not hired as well as those who are. Most institutions survey employers in some fashion. The revision of this measure provides for these institutional efforts to be coordinated with some common questions and procedures across institutions within a sector. The second part of the measure could be criteria referenced once the specific survey instruments have been

developed and baseline data has been collected. Details of Part 1 would be worked out with institutions in the spring of 1999 and this part of the measure would be applicable in the 1999-2000 performance year. Details of Part 2 would be worked out in 1999-2000, and the measure would be applicable in 2000-2001. Part 3 is applicable only when statewide survey information is available from the Employment Security Commission or other sources.

8C. Accessibility to the Institution of all Citizens of the State

Recommendation: One part of the current measure uses a comparison of other race retention to non-other race retention, expressed as a percentage of percentages. One recommended revision removes this element from the measure, although the data would be displayed, so that a decline in non-other race retention would not result in what would appear to be an increase in performance for the institution. Another recommended change is to base the measure on citizens of the state, as the phrasing of the indicator in Act 359 indicates. Two other changes include as part of the measure other race enrollment of students in graduate programs and the number of degrees awarded. Finally, it is recommended that the definition of "other-race" for federal reporting requirements be used. The revised measure, with these elements, would have four parts:

- 1) The percent of undergraduate headcount students who are citizens of South Carolina who are other race according to federal reporting definitions and are enrolled at an institution
- 2) The annual retention rate of other-race undergraduate students as defined in Part 1 of this measure
- 3) The percent of headcount graduate students enrolled at an institution who are other race according to federal reporting definitions
- 4) The percent of headcount teaching faculty who are other-race

Discussion: The recommended revisions remove one problem in the existing measure and add new parts to address areas of concern in terms of access: graduate enrollments and faculty. The suggested revision also focuses the measure on in-state residents in keeping with the phrasing in the legislation, which specifically refers to "citizens of the state," and revises the definition of other-race to include minorities other than African-American to be consistent with federal reporting requirements. All percentages are based on headcount.

9A. Financial Support for Reform in Teacher Education

Recommendation: The measure would stay the same, except that the three-year rolling average would not be weighted. Also, the institutions' cash matching contribution would be deleted from the measure. Rather than having this indicator benchmarked annually, it would be more effective and less time consuming to use a criteria referenced scale, as recommended below. The resulting measure would read as follows:

The amount of grants and awards expended to support teacher preparation or training, including applied research, professional development, and training grants, as compared to the average from the prior three years.

Criteria:

120% or more	Exceeds
80% - 119%	Achieves
79% or less	Does not achieve

Discussion: The recommended changes simplify the measure. Eliminating the weighted average reduces the tendency for receiving a large grant in one year to accelerate expectations beyond reasonable levels for the following year. The criteria referenced scale eliminates the process of institutions' proposing benchmarks and the Commission's approving them. Broad ranges are provided for the criteria because the dollar amount may fluctuate dramatically from year to year.

9B. Amount of Public and Private Sector Grants

Recommendation: The use of a weighted average for three years would be replaced by a simple three year rolling average and a criterion-referenced scoring scale will be used, as indicated below:

The current year's grants (i.e., the total dollars received from public and private sector grants expended in State fiscal year for research, including federal and state grants, private gifts and grants, and local support, and excluding monies for financial aid, student scholarships and loans) divided by the average of grant funding from the prior three years. This indicator would apply only to those institutions with \$1 million or more in annual research expenditures.

Criteria:

105% or more	Exceeds
95% - 104%	Meets
94% or less	Does not meet

Discussion: This recommended change would, as with the measure for 9A, reduce the negative impact in future years of receiving an especially large grant one year. With this change, a criteria referenced scoring scale could be used, which would eliminate the need for annual benchmarking.

Note: With the recommended change in the rating scale, the criteria for measures 2E1 and 2E2, Availability of Faculty to Students Outside the Classroom will be changed as follows:

90% - 100%	Exceeds
80% - 89%	Achieves
79% and below	Does Not Achieve

The following corrections are noted for the Planning and Assessment material included in Agenda Item 3.05(A) for the March 4 meeting of the Commission:

- 1.) page 5, Recommendation IV, Incentives: (line 4) "Performance Improvement Pool" should read "Performance Incentive Pool"
- 2.) page 6, Recommendation IV, Performance Incentive Pool: (item 3) "Does Not Meet" and "Substantially Does Not Meet" should read "Does Not Achieve" and "Substantially Does Not Achieve."
- 3.) Attachment I, page 4, Indicator 3D: "Meets" in the criterion-referenced scale should read "Achieves"
- 4.) Attachment I, page 7, Indicator 9B: "Meets" in the criterion-referenced scale should read "Achieves"

ATTACHMENT 2: SUMMARY OF RECOMMENDED REVISIONS TO INDICATORS

2/25/99

2/25/99

SECTOR BENCHMARKS, as defined currently

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ATTACHMENT 2: SUMMARY OF RECOMMENDED REVISIONS TO INDICATORS

2/25/99

UNIVERSITY OF CALIFORNIA, BERKELEY

2/25/99

Indicator Number	Indicator Title	Revision Suggested	Type Future Revision Suggested	To Be Evaluated for Revision for Performance Year 1999-00		Rating Measure Type: Yes/No (Y/N), Benchmark (B), Criterion-Ref. (CR)	SECTOR BENCHMARKS, as defined currently						
				Frequency	Beginning Performance Year		Current	Proposed	Changes in Data/Reporting Requirement With Proposed Change	Reach	Teach	Reg.	Tech
2-C	Post Tenure Review for Tenured Faculty	Technical Correction to Definition & scoring change	To be evaluated for frequency of measure across years	3	1998-99 (Performance Yr 3)	B	B	CR	No additional data/report required	100%	100%	100%	N/A
2-D	Compensation of Faculty	Change in measure to average salary by rank				B	B	B	Data revision and therefore change in current CHEMIS reporting may be needed	\$63,274	\$51,099	\$45,808	\$44,911
2-E	Availability of Faculty to Students Outside the Classroom	None	To be evaluated for frequency of measure across years	2	1998-99 (Perf Yr 3)	CR	CR	CR		CR Scale	CR Scale	CR Scale	CR Scale
2-E1	Percent of Faculty Receiving a Rating of Satisfied												
2-E2	Percent of Students Satisfied with Academic Advisors	Review survey process and standardize for all institutions	To be evaluated for frequency of measure across years	2	1998-99 (Perf Yr 3)	CR	CR	CR	Some institutions may have to change current survey process	CR Scale	CR Scale	CR Scale	CR Scale
2-F	Community and Public Service Activities of Faculty for Which No Additional Compensation is Paid	Measurement is included in requirements for 2B	across years			Y/N	Y/N	not applicable, see 2B	Proposed change reduces current institution reporting requirements	Yes	Yes	Yes	Yes
3-A	Class Size and Student/Teacher Ratios	Add subpart 3A3						CR	Institutions will have to report additional info on "large" classes				
3-A1a	Average Class Size - Lower Division Lecture Classes	Revises Sector Benchmark				B	B	CR		30-33	25-28	18-21	18-21
3-A1b	Average Class Size - Upper Division Lecture Classes	Revises Sector Benchmark				B	B	CR		25-27	18-20	N/A	N/A
3-A2	FTE Students per FTE Teaching Faculty (Instructional)	Revises Sector Benchmark				B	B	CR		14-16	14-16	18-18	16-18
3-B	Average Number of Credit Hours Taught by Full-time Teaching Faculty	None	Review for upper limit maximum level			B	B	B		None	None	None	None
3-C	Ratio of Full-time Faculty as Compared to Other Full-Time Employees	None				B	B	B		29.6%	29.6%	40.1%	40.1%
3-D	Accreditation of Degree-Granting Programs	Scoring Change				B	B	CR	No additional data/report required	100%	100%	100%	100%

REVISIONS TO TABLE 1

ATTACHMENT 2: SUMMARY OF RECOMMENDED REVISIONS TO INDICATORS

2/23/99

Indicator Number	Indicator Title	Revision Suggested	To Be Evaluated for Revision for Performance Year 1999-00		Rating Measure Type: Yes/No (Y/N), Benchmark (B), Criterion-Ref. (CR)	Changes in Data/Reporting Requirement With Proposed Change	SECTOR BENCHMARKS, as defined currently			
			Type Future Revision Suggested	Frequency	Beginning Performance Year	Proposed	Resch	Teach	Reg.	Techns
3-E	Institutional Emphasis on Quality Teacher Education and Reform	None								
3-E1	Program Quality - NCATE Accreditation	None								
3-E2a	Student Performance: Percentage of Students Passing NTE - Professional Knowledge	None								
3-E2b	Student Performance: Percentage of Students Passing NTE - Specialty Area	None								
3-E3a	Critical Needs: Percentage of Graduates in Critical Shortage Areas	None								
3-E3b	Critical Needs: Percentage of Teacher Education Graduates who are Minority	None								
4-A	Technology, Programs, Equipment, Supplies, and Source Matter Experts within the Institution and with Other Institutions and with the Business Community	None								
4-B	Cooperation and Collaboration with Private Industry	None								
5-A	Administrative Efficiency: Percentage of Administrative Costs as Compared to Academic Costs	SA1 and SA2 combine to form a single measure; Sector benchmark to be reviewed and adjusted								

ATTACHMENT 2: SUMMARY OF RECOMMENDED REVISIONS TO INDICATORS

2/25/99

2/25/99

RECOMMENDED REVISIONS TO INDICATORS

Indicator Number	Indicator Title	Revision Suggested	To Be Evaluated for Revision for Performance Year 1999-00			Rating Measure Type: Yes/No (Y/N), Benchmark (B), Criterion-Rel. (CR)		SECTOR BENCHMARKS, as defined currently				
			Type Future Revision Suggested	Frequency	Beginning Performance Year	Current	Proposed	Changes in Data/Reporting Requirement With Proposed Change	Reach	Teach	Reg.	Techs
Summary of Suggested Schedule. ...See p. 1 for explanation												
5-A1	Administrative costs (institutional support) as a percentage of total E&G expenditures	combine with SA1 to form one ratio				B	not applicable		7.6%	12.8%	14.4%	14.4%
5-A2	Academic Costs as a percentage of total E&G expenditures	combine with SA2 to form one ratio				B	not applicable		80.0%	65.0%	65.0%	65.0%
5-B	Use of Best Management Practices	None	Review elements for consistency across institutions. To be evaluated for frequency of measure across years	2	1998-99 (Part Yr 3)	B	B		100%	100%	100%	100%
5-C	Elimination of Unjustified Duplication of and Waste in Administrative and Academic Programs	None	Review elements for consistency across institutions. To be evaluated for frequency of measure across years	3	2000-2001	Y/N	Y/N		Yes	Yes	Yes	Yes
5-D	General Overhead Costs Per FTE Student	Sector benchmark to be reviewed and adjusted	Review benchmarks			B	B	No additional data/report required	2,831	2,742	869	869
5-E	Student Retention											
6-A	Percent of first-time entering freshmen who take the SAT or ACT who meet or exceed Commission approved SAT or ACT target score	None	Review measure			B	B		75.0%	60.0%	33.3%	N/A
6-B	High School Class Standing, Grade Point Averages, and Activities of the Student Body (1% first time freshmen who rank in top 30% of senior class or have GPA of 3.0 or higher)	None	Review consistency across institutions			B	B		None	None	None	N/A

REVISION TO TABLE

ATTACHMENT 2: SUMMARY OF RECOMMENDED REVISIONS TO INDICATORS

2/25/99

Indicator Number	Indicator Title	Revision Suggested	To Be Evaluated for Revision for Performance Year 1999-00			Rating Measure Type: Yes/No (Y/N), Benchmark (B), Criterion-Ref. (CR)		Changes in Data/Reporting Requirement With Proposed Change	SECTOR BENCHMARKS, as defined currently			
			Type Future Revision Suggested	Frequency	Beginning Performance Year	Current	Proposed		Reach	Teach	Reg.	Tech.
6-C	Post-Secondary Non-Academic Achievements of Student Body	None					Y/N		Yes	Yes	Yes	Yes
6-D	Priority on Enrolling In-State Students	None				B	B		70%	80%	N/A	N/A
7-A	Graduation Rate	Additional subject to the measure for the Technical Colleges only.				B	B	Additional reporting requirement for technical colleges regarding developmental students.	None	None	None	None
7-B	Employment Rate for Graduates	Revise measure to consolidate 7B and 7E, measure proposed to have 3 subparts.	To be evaluated for frequency of measure across years.	2	1998-2000	Y/N	part 1: Y/N part 2 & 3: CR and CR dependent on part 1	Changes in Data/Reporting Requirement With Proposed Change	Yes	Yes	Yes	Yes
7-C	Employer Feedback on Graduates	Revise measure to include 3 subparts.	To be evaluated for frequency of measure across years.	2	1999-2000	Y/N	part 1: Y/N part 2 & 3: CR and CR dependent on part 1	Changes in Data/Reporting Requirement With Proposed Change	Yes	Yes	Yes	Yes
7-D	Scores of Graduates on Post-graduate, professional, graduate, or employment-related examinations and certification tests	None				B	B		None	None	None	None
7-E	Number of Graduates who Continue Their Education at SC Public Institutions Within One Year of Graduation	Measure is consolidated with 7B above	Review AA/AS graduates continuing at the same institution			B	not applicable		None	None	None	None
7-F	Credit Hours Earned of Graduates	None	Review for upper limit max out level			B	B		110%	110%	N/A	N/A
8-A	Transferability of Credits to and from the Institution	None				B	B		100%	100%	100%	100%
8-B	Continuing Education Programs for Graduates and Others	None				B	B		None	None	None	None

ATTACHMENT 2: SUMMARY OF RECOMMENDED REVISIONS TO INDICATORS

2/25/99

Indicator Number	Indicator Title	Revision Suggested	To Be Evaluated for Revision for Performance Year 1999-00			Rating Measure Type: Yes/No (Y/N), Benchmark (B), Criterion-Ref. (CR)		SECTOR BENCHMARKS, as defined currently			
			Type Future Revision Suggested	Frequency	Beginning Performance Year	Current	Proposed	Changes in Data/Reporting Requirement With Proposed Change	Resch	Teach	Techs
B-C	Accessibility to the Institution of All Citizens of the State	Measure Revision to include changes to current subparts and addition of new subparts; resulting in four subparts (BC1 - BC4)						Data collected by CHE, should be no additional reporting requirement for institutions			
B-C1a	Percentage of Other Race Students Enrolled	Revision of definition to limit measure to citizens of SC and to change other race definition to include all other race federal categories (BC1)				B	B	Data collected by CHE, should be no additional reporting requirement for institutions	None	None	None
B-C1b	Retention Ratio of Other Race Students	Revision to refile, definition for other race as with BC1, and revision applicability of measure to citizens as in BC1				B	B	Data collected by CHE, should be no additional reporting requirement for institutions	None	None	None
		BC21 added to measure, % other race graduate students				not applicable	B	Data collected by CHE, should be no additional reporting requirement for institutions	None	None	None
		BC4 added to measure, % other race faculty				not applicable	B	May require revision to CHEMIS faculty title institution report	None	None	None
B-A	Financial Support for Reform in Teacher Education	Revision to definition and scoring change				B	CR	Change in reporting requirement	105%	105%	N/A
B-B	Amount of Public and Private Sector Grants	Revision to definition and scoring change				B	CR	No additional data/report required	105%	105%	N/A