

### Performance Funding Ratings for 2001-2002 affecting FY 2002-2003

The Planning and Assessment Committee's recommendations for institutional ratings for the 2001-02 year, impacting FY 2002-03 allocations, are attached. The Committee considered recommended ratings at its May 21, 2002 meeting. The Committee approved staff's recommendations for ratings and appeals and also considered and approved an additional exception for MUSC for Indicator 5A, Administrative to Academic Costs, to recognize the impact of the creation of the hospital authority. The recommendations reflect an average score for all institutions of 84% (2.51 of 3). In all, 18 of 33 institutions were rated as performing in the "Achieves" category and 14 institutions in the "Exceeds" category, and 1 institution rated in the "Substantially Exceeds" category.

In comparison with past years, the 2001-02 recommended scores overall are similar to past years: in 2000-01 scores impacting FY 2001-02, the average score was 82% (2.47 of 3) with 16 performing in the "Exceeds" category and 17 in the "Achieves" category; in 1999-2000 scores impacting FY 2000-01, the average score was 84% (2.53 of 3) with 11 performing in the "Exceeds" category and 22 performing in the "Achieves" category; and for 1998-99 scores impacting FY 1999-00, the average score was 86% (2.57 of 3), with 18 performing in the "Exceeds" category and 15 institutions performing in the "Achieves" category. As was the case last year, common standards for institutions within sectors based on national, state or peer data, as available, remained in effect. An additional change this past year limited the number of indicators to 13 or 14, depending on the sector, that contribute to each institution's overall score. Indicators contributing to the score were identified as those best reflective of sector missions and those that reduced redundancy.

**Process:** CHE staff distributed preliminary recommendations to the state's public colleges and universities on April 10, 2002. Institutions were asked to respond in writing, with adequate supporting documentation, by April 24 if they wished to appeal a score for special consideration and be heard at the Planning and Assessment Committee meeting on May 21. This year, 7 institutions submitted written concerns, with one later withdrawing its appeal, for consideration, compared to 4 in 2000-01, 8 in 1999-00 and 26 in 1998-99. The institutions that submitted appeals raised 7 issues across 5 indicators. For comparison, a total of 7 issues related to performance scores were raised last year, 18 1999-2000, and 85 in 1998-99, the first year written appeals were requested. Staff also addressed needed data corrections as questions were raised and issues resolved after the release of preliminary recommendations. Staff responded to several issues raised either internally or externally from institutions as scores and data were reviewed that resulted in data corrections across 6 institutions and 7 data points. Of these revisions, only 2 resulted in a revised overall score. The Committee considered and approved for consideration of the Commission the ratings as attached at its meeting on May 21, 2002.

***Recommendation: The Planning and Assessment Committee recommends for approval of the Commission the attached ratings for the 2001-02 performance year to impact FY 2002-03 allocations.***

#### **ATTACHMENTS:**

**Format of Attached Ratings:** Recommendations are presented in the "report card" format and updated to reflect the Committee's action at its May 21 meeting. Each institution report is 1 to 4 pages in length. The format is similar to that of last year's reports, updated to reflect changes implemented this year. For each institution, the first page presents a summary of the institution's overall performance and provides institutional information and "facts at-a-glance" institutional data. Following page one, a detailed report of performance and scores by "Critical Success Factor" by indicator is presented. Like last year's reports, only indicators yielding numeric data and scores are displayed in detail. Information displayed for these indicators includes: the indicator reference number and title, the timeframe for the current year data, three

years of historical data, current year performance data, the standard applied to derive the score, information regarding the improvement factor, and the staff recommended score for each subpart measure and for each indicator. Applicable notes regarding scored indicators and notes as to the status of indicators that are not scored numerically are found after the listing of numerically scored indicators for each "Critical Success Factor." Displayed on the last page of the detailed indicator display is a summary of the institution's overall performance.

**A Note on the Electronic Files Containing the Recommendations:** The ratings are in attached excel files, one file containing a general cover sheet for the recommendations and four files, one for each sector, containing the ratings. There are multiple worksheets within each file. The worksheets include a cover sheet for the sector and two worksheets for each institution. In order print the reports and have the page numbers print correctly for each institution, go to each worksheet and print it separately. For the detailed pages, the worksheet is set to print 4 pages, the first is blank and the rest include the detailed information. For this latter worksheet, print just pages 2-4 if you want to skip the blank page. The purpose of the blank page is to create the correct page numbers for the detailed pages. The files will be posted on the web at <http://www.che400.state.sc.us/web/PF%20in%20SC.htm>.