POTENTIAL CRITICAL MEASURES AND RELATIONS TO STRATEGIC DIRECTIONS IN UNIVERSITY 2000

	Undergraduate	Graduate & Professional	Research & Scholarship	Outreach & Access	User Friendly Community
Potential Critical Measures					
[teaching/learning]					
1. Characteristics of entering students (readiness, diversity)	X	X			

2. Student experience
   - student satisfaction
   - faculty involvement in undergraduate teaching
	X	X			X

3. Uniqueness of baccalaureate experience	X				
4. Graduation rate (full time, part time, diversity/underrepresented minorities)	X	?			
5. Credits to degree (required, actual)	X				
6. Post-graduation experience (further education, employment)	X	X			
7. Reputation of graduate and professional programs		X			
[research/discovery]					
8. Sponsored funding (research, scholarship, artistic activity, development, training)			X		
9. Scholarly, research, and artistic accomplishments (honors, awards, offices, patents, books, articles, performances, exhibits)			X		
[outreach/public service]					
10. Outreach contacts (visits, phone calls, meetings)				X	
11. Response to compelling state needs				X	
12. Continuing education				X	X
[overarching areas]					
13. Interdisciplinary/applied programs and activities	X	X	X	X	X

POTENTIAL CRITICAL MEASURES AND RELATIONS TO STRATEGIC DIRECTIONS IN UNIVERSITY 2000

Potential Critical Measures	Undergraduate	Graduate & Professional	Research & Scholarship	Outreach & Access	User Friendly Community
14. Responsiveness to "market" (instruction, research, services) - demand - user satisfaction	X	X	X	X	X
15. Overall satisfaction of Minnesota citizens with the University	X	X	X	X	X
[diversity] 16. Underrepresented minority groups, women (students, faculty, staff) - K-12 graduation - retention through University graduation - graduate/professional students	X	X	X	X	X
[management effectivenes] 17. Faculty and staff - development - satisfaction - retention	X	X	X	X	X
18. Facilities - deferred maintenance - physical accessibility - safety	X	X	X	X	X
19. Resource development - fundraising - investment performance	X	X	X	X	X
20. Cost/student	X	X			
21. Bureaucracy	X	X	X	X	X

Note: "X" means we intend a direct relation of measure to strategic direction; "?" means we are not sure we should focus on the relation. Direct comments and questions to one of the following: Or you may send comments to any of these individuals at:

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UNIVERSITY OF MINNESOTA

U 2000

DISCUSSION OUTLINE:

Institutional-Level Critical Measures and Performance Goals

Second Phase

Please direct any questions or comments to one of the following:

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Context and Overview: On January 14, 1994, the Board of Regents approved a University 2000 Mission, Vision, Strategic Directions, and Performance statement. The resolution also called for the development of "critical measures" for assessing institutional, campus, and unit performance in realizing the goals of U2000. The six major areas identified for emphasis in University 2000 are: research; graduate and professional education; undergraduate education; access and outreach; user-friendliness; and diversity.

In the spring of 1994, principles were articulated to guide the development and use of critical measures, which are intended to achieve the following purposes: publicly confirm the University's success in reaching its stated goals and objectives; guide and facilitate institutional, collegiate, and support unit self improvement; serve as an important link between planning, performance, evaluation, and resource allocation; and provide a means for comparison with other similar institutions, in search of best practices for the accomplishment of institutional goals.

Development of Eighteen Measures: Previous recommendations, existing management reports, planning documents, and external reporting requirements were reviewed to identify potential measurement areas, and a series of meetings was held inside and outside the University to listen to suggestions and reactions to a proposed list of measures. This process resulted in a list of eighteen critical measurement areas, divided into three groups:

First Phase (1994)	Second Phase (1995)	Third Phase (1995-96)
• characteristics of entering students	• student experience	• reputation of undergraduate, graduate, and professional programs
• graduation rate	• post-graduation experience	
• underrepresented groups/diversity	• scholarship, research, artistic accomplishments	
• sponsored funding		• interdisciplinary/applied programs
• investment per student	• responsiveness to compelling state needs	• outreach, public service
	• overall satisfaction of Minnesota citizens	• responsiveness to market demand
	• faculty and staff recruitment, satisfaction, retention	• customer service/streamlining
	• facilities	
	• resource development	

Approval of First Phase Measures: The first five critical measures were reviewed by the Board of Regents at their September and November 1994 meetings and approved on December 8, 1994.

Consultation Process and Timing for Second Phase: The second group of eight measures will be developed during the 1994-95 academic year, using a discussion process involving campuses, colleges and administrative units, University Senate and Senate committees; staff committees; student organizations/groups; President Hasselmo's minority advisory committees; and other external groups:

   • Part one will focus on a discussion outline covering all eight measurement areas, to identify the most important aspects of each broad area to measure (January, February 1995).
   • Part two will focus on a relatively complete set of narrative drafts, to get reactions to operational definitions, baseline information, and tentative goals (February, March, April 1995).

Other 1995 Critical Measures Work: During the winter and spring of 1995, additional work will include definition of the "fit" between institutional and unit level measures; determination of the appropriate levels for collection, analysis, and reporting of the institutional critical measures; and preparation of instructions to colleges and administrative units for the performance reporting segment of the planning/budgeting/evaluation cycle.

Student Experience

Relation to U2000:

U2000 addresses the quality of the student experience in the mission statement and in all six of the strategic areas. Undergraduate education should provide: a high quality undergraduate education in a <u>nurturing environment</u> that fosters student success in an <u>intense intellectual milieu</u>; <u>congenial support systems</u> (including advising, special programming, student development, and out-of-classroom experiences) that help students move through their academic programs; a <u>liberal education</u> that introduces all students to modes of inquiry and the subject matter of the major branches of knowledge; and an <u>in-depth study of a discipline or interdisciplinary field</u> grounded in the research, scholarly, and artistic achievements of the faculty. Graduate and professional education should be based on <u>participation in the creation of knowledge</u> and include improved <u>access to interdisciplinary programs</u> and quality practioner-oriented/applied professional programs. Outreach and access should include <u>new arrangements for</u> more effectively <u>serving part-time students.</u> The "underrepresented groups/diversity" strategic area emphasizes the importance of enrolling and graduating students from <u>underrepresented groups.</u>

Relation to other measures:

Other related critical measures include *characteristics of entering students, graduation rate, post-graduation experience,* and *underrepresented groups/diversity.*

Possible focus of this measure:

This critical measure focuses on the experience that students have on each of our campuses. At one level, it would take a very complicated measure to address all of the factors that contribute to a student's educational experience. In thinking about each of the critical measure areas, it is necessary to focus on a small number of core elements that are central to the area being addressed. Three important areas seem to be:

1) <u>Student Satisfaction:</u> This category refers to how students evaluate their experiences on each of our campuses and is a "process" measure that relates directly to the student experience. The following are two approaches that might be used to define the student satisfaction category:

a) student evaluation of teaching

b) annual campus survey (e.g., overall satisfaction; relationships with faculty/peers/staff; experiences with advising, special programming, out-of-classroom learning, interdisciplinary work)

2) <u>Student Learning and Performance:</u> This category focuses on student learning, and has one component that is based on the existing grade reporting process, and another that would need to be developed:

a) quarterly grades received

b) "end of major" assessment

3) <u>Other Measures of the Student Experience:</u> This third category would focus on other aspects of the student experience, such as:

a) quarterly credits completed

b) participation in special programming (e.g., UROP, internships, study abroad, career counseling)

Results for this measure should be broken out for all underrepresented groups, as well as for different types of students (undergraduate, graduate, and professional students).

Issues/Considerations in Measurement:

<u>Questions include:</u>

1) are there other important aspects of the student experience that should be considered for measurement;

2) are there unique measures for undergraduate, graduate, and professional students, or can they be measured in more or less the same ways;

3) at what intervals/how often should data be collected;

4) if only one or two measures can be used, what should they be, and;

5) at what levels should the results of this kind of measure be reported?

Post-Graduation Experience

Relation to U2000:

In U2000, the mission statement talks about preparing graduate, professional, and undergraduate students, as well as non-degree seeking students interested in lifelong learning, for active roles in a multiracial and multicultural world. The "graduate and professional education" strategic area talks about support, graduation, and placement of the best students, targeting members of traditionally underrepresented populations. The "undergraduate education" strategic area talks about the need for career counseling and job placement services to help students make the transition from education to employment, as well as for activities designed to promote cooperation, leadership, and personal development.

Relation to other measures:

Other related critical measures include *student experience, graduation rate,* and *underrepresented groups/diversity.*

Possible focus of this measure:

1) Employment success of students: To what extent are graduates of the University's undergraduate, graduate, and professional programs assisted with career development and job placement, and employed in satisfying careers that are in some way related to their University education? To what extent have professional degree recipients been licensed or otherwise credentialled within their fields?

2) Student success in further education: To what extent are graduates of the University's undergraduate, graduate, and professional programs pursuing further education in high quality programs at the University or at other institutions. Are our graduates getting into their programs and institutions of choice? Do our graduates value, and are they taking advantage of, lifelong learning opportunities?

3) Contributions in civic and community life/experience of quality of life: To what extent are University graduates using the knowledge and skills acquired during their University experience to contribute to their communities or otherwise enhance the quality of life for themselves and those around them?

Data for this measure could be collected in several ways: through regular surveys of graduates, to ascertain their post-graduation experience and to understand their perceptions of the effect of their University experience (as well as a retrospective evaluation of their student experience); through periodic surveys of employers, to obtain an outside perspective on the success of our graduates and the effectivenss of their University preparation (e.g., similar to a state-wide survey conducted in the summer of 1993); and through monitoring of the media and other sources for evidence of graduates' contributions to civic life and quality of life issues.

Results for this measure should be broken out for graduates of undergraduate programs, graduate programs, and professional programs, as well as for non-degree seeking students; results should also be broken out for all underrepresented groups.

Issues/Considerations in Measurement:

Questions include:

1) are there other important elements of the post-graduation experience that should be considered for measurement;

2) are there unique measures for undergraduate, graduate, and professional students, or can they be measured in more or less the same ways;

3) at what intervals/how often should data be collected;

4) if only one or two measures can be used, what should they be, and;

5) at what levels should the results of this kind of measure be reported?

Scholarship, Research, Artistic Accomplishments

Relation to U2000:

U2000's research strategic direction states that a primary mission of the University of Minnesota is research, scholarship, and artistic activity— the <u>discovery of new knowledge and its dissemination</u> to the state, the nation, and the world, with a major goal of sustaining and improving the University's position as one of the premier research universities in the country and the world. Accomplishments in the areas of scholarship, research, and artistic activity also have important <u>impacts on undergraduate and graduate and professional education</u>, continuing education, <u>and outreach</u> programs.

Relation to other measures:

Other related critical measures include *faculty and staff experience; sponsored funding; reputation of programs* (undergraduate, graduate, and professional education); *student experience; underrepresented groups/diversity;* and *interdisciplinary/applied programs.*

Possible focus of this measure:

Measures for research and creative activities are typically classified under four broad headings, although they are not mutually exclusive categories: quantity; impact or influence; importance; and quality. Bibliometric methods have focused on the first two areas, whereas peer review studies or weighting schemes have attempted to measure the last two areas. Four kinds of measures, all of which could viewed in comparison with peer institutions as well as within units in the University over time, are outlined below:

1) <u>Quantity of publications/products/activities</u> can be classified as follows:

   a) <u>books</u> (including textbooks, edited books, monographs);

   b) refereed journal <u>articles</u> (including book chapters); and

   c) <u>exhibits, exhibitions, patents and licenses, software, designs</u> and other scholarly and artistic work.

2) <u>Scholarly influence</u>: <u>Citation counts</u> refer to the number of occasions on which the work of a faculty member is cited or referred to in journal articles and have become a standard way (since the early 1960s) to assess the scholarly influence of research publications.

Citation data from more than 7,000 journals are collected by the Institute for Scientific Information and published annually in the Science Citation Index, the Social Science Citation Index, and the Arts and Humanities Citation Index. Information is provided on name of author, number and source of each citation, name of journal, number of times journal is cited, and average number of citations an article in a particular journal might receive (the journal's "impact" factor).

3) <u>Scholarly recognition</u>, reflecting the relative standing of faculty in their fields, includes:

    a) <u>awards</u>, including national and international recognition of the work of faculty through awards, prizes, and honors by professional organizations; and

    b) <u>elected memberships in national/international organizations, editorial boards</u> (refereed journals).

4) <u>Impact on professional practice, societal issues, quality of life</u>: not a count of activity so much as a focus on significant, exemplary, beyond-the-norm accomplishments that would be generally recognized as having an impact on people, the field, and/or the profession. Examples might include successful collaborative and/or interdisiciplinary approaches to both theoretical and applied problems.

Issues/Considerations in Measurement

<u>Questions related to publications</u> include which types of publications to count and how to weigh quality.

<u>Questions related to citation counts</u> include problems related to the citation practices of authors; citation indexes, e.g., the time period reported; differential quality of publications; and variable applicability across academic units.

<u>Other questions:</u>

1) are there other important elements of scholarship, research, and artistic accomplishment that should be considered for measurement;

2) what are the most important aspects of this measure;

3) if only one or two measures can be used, what should they be; and

4) at what levels should the data be collected and reported?

Responsiveness to Compelling State Needs

Relation to U2000:

The resolution establishing U2000 talks about the University's need to respond to the needs of the many communities it serves, and to assist individuals, institutions, and communities in responding to a continuously changing world. The "outreach and public service" mission statement talks about applying scholarly expertise to community problems, helping organizations and individuals respond to their changing environments, and making the knowledge and resources created and preserved at the University accessible. In addition, the "outreach and access" strategic area talks about addressing societal issues where the University's expertise can be brought to bear, by employing a comprehensive perspective through cross-disciplinary efforts and partnerships with public and private organizations.

Relation to other measures:

Other related critical measures include *interdisciplinary/applied programs, outreach and public service, responsiveness to market demand,* and *underrepresented groups/diversity.*

Possible focus of this measure:

Two possible approaches are described below, both of which assume that this measure may be more qualitative than quantitative; also that the timeframe for goal setting and measurement might vary depending on the complexity of the needs/issues selected:

1) Based on and integrated with the internal planning/budgeting/ evaluation process: From institutional, campus, and collegiate external environmental scanning and planning documents, a list of state needs that are and/or could be addressed by University expertise could be compiled. This list could then be used in at least two ways:

   a) to provide an overall picture of the number and type of issues being addressed at an inter-collegiate, collegiate, or departmental level, as well as the number of faculty and staff engaged in this work; and

   b) as a basis for the selection of one or two issues as institutional priorities for a comprehensive, interdisciplinary University-wide

response, which could, for example, be announced in the State of the University address and become part of the instructions to campuses and units in the next planning/budgeting/evaluation cycle. A complex example might be expanding the K12 initiative to address issues affecting children, youth and families in both urban and rural environments.

2) Based on an externally focused process: A process of external consultation with state leaders and key constituency groups could be the starting point for identifying important state needs where the University's expertise could be applied. The list of critical state needs resulting from this process could be used to track (in the planning process) and report on (in the evaluation process) activities within the University that address these issues, similar to #1a above. Institutional level priorities could also be identified, similar to #1b above.

Whichever approach is used, this measure might include both an activity count and at least a qualitative description of any measurable results achieved. Results for this measure could be broken out to show how well issues affecting underrepresented groups are represented in the University's response.

Issues/Considerations in Measurement:

Questions include:

1) are there other approaches to the selection and measurement of issues that should be considered for measurement;

2) if only one or two measures can be used, what should they be; and

3) at what levels should the results of this kind of measure be reported?

- 8 -

Overall Satisfaction of Minnesota Citizens with the University

Relation to U2000:

U2000 states the University's commitment to enhancing the social, cultural, economic, and intellectual health of Minnesota and the Upper Midwest and reiterates the three elements of its missions as a land-grant, research university: research and discovery, teaching and learning, and outreach and public service. The University's vision for the 21st century is elaborated in the six strategic areas of research, graduate and professional education, undergraduate education, outreach and access, user-friendly University community, and diversity. The understanding and support of the citizens of the state are critical to the University's success in achieving the goals of U2000.

Relation to other measures:

To the extent that public perceptions of the University relate to all of its functions and activities, this measure might provide additional information related to any/*all of the other critical measures.*

Possible focus of this measure:

In some way, this measure should tap public perceptions related to the University's three part mission, its vision for the future, and all six of its strategic directions. Two approaches are outlined below:

1) **View of general public on institution as a whole:** Public opinion polling can provide a general picture of public perceptions of the University, assuming that the important areas are included and a representative sample is drawn. The University has participated in an annual statewide survey for the past several years and could continue to do so, focused on U2000 goals, at either the same or an expanded level in future years. The survey conducted in 1994 asked for several general awareness and favorableness/satisfaction ratings of the University, as well as about the quality of its undergraduate instruction, graduate and professional programs, and faculty; the contributions of its research to the quality of life in Minnesota; its attention to diversity; its public service and outreach activities; and its attention to customer service. An expanded survey might include additional areas (e.g., attitudes concerning access, readiness goals for students, compelling state needs, University outreach), or probe for underlying attitudes about the University.

2) <u>View of selected aspects of the institution or by selected stakeholder groups:</u> Polling or other methods can be used for more in-depth exploration of the basis for general perceptions, as well as for the more specific views of selected target groups (e.g., local communities, businesses, elected officials, communities of color, non-profit organizations, etc.). The "Conversations with Minnesota" process used in an earlier stage of U2000 planning is an example of this approach, as is a "Listening to Minnesota" process recently undertaken by the Minnesota Extension Service.

Results for this measure could be broken out for all underrepresented groups, as well as for other targeted groups.

Issues/Considerations in Measurement:

<u>Questions include:</u>

1) what are the most important aspects of the University's performance that should be measured;

2) are there some stakeholder groups that should be given priority attention in this measure;

3) are there other methods of measurement that should be considered;

4) at what intervals/how often should public perceptions of the University be measured;

5) if only one or two aspects can be used as the focus for this measure, what should they be; and

6) at what levels should the data be collected and the results reported (e.g., institution overall, by campus, etc.)?

Faculty/Staff Recruitment, Development, Satisfaction, Retention

Relation to U2000:

U2000 talks about recruiting faculty who are <u>world-class</u> researchers, scholars, and artists; <u>effective teachers;</u> reflect the <u>diversity</u> of society; <u>free to look at the world as they see it</u> and to express what they see in their <u>work;</u> and have the <u>support</u> they need for creation of new knowledge in <u>basic, interdisciplinary, and applied</u> areas and for effective teaching. Staff should be enabled to design and provide services that are <u>needed and valued</u> by all members of the University community and should be given <u>time and support</u> to accomplish their work in a consistently <u>high quality</u> manner.

Relation to other measures:

Other related critical measures include *scholarship, research, artistic accomplishments; sponsored funding; reputation of programs* for undergraduate, graduate, and professional education; *student experience; underrepresented groups/diversity;* and *interdisciplinary/applied programs*.

Possible focus of this measure:

1) <u>Recruitment of top quality faculty and staff:</u> The University's ability to <u>attract</u> top quality faculty and staff may be measured by examining:

   a) <u>reputation of institutions</u> from which new faculty (and at least high level administrative staff) are sucessfully recruited;

   b) <u>awards and recognition they have received</u> for excellence in scholarship, teaching, outreach, or administrative leadership in their prior work; and/or

   c) <u>their records in attracting</u> good students and sponsored funding, and performing outreach/service.

2) <u>Satisfaction with faculty/staff experience:</u> One approach to measurement of the faculty and staff experience is to ask, through regular surveys, to what degree faculty and staff feel they have:

   a) the <u>freedom,</u> the <u>respect,</u> and the <u>support</u> to pursue their chosen areas of inquiry and/or assigned areas of responsibility;

   b) whether they feel that there is <u>institutional recognition</u> of their work (salary, rank, other);

c) how they view <u>workload issues</u>, i.e., expectations concerning teaching, research, outreach, committee work, etc.; and

d) their rate of promotion/time in rank.

3) <u>Development of faculty/staff:</u>

a) what human and financial resources are devoted to different types of support, including development programs for faculty and staff, mentoring of junior faculty and new staff, provision of equipment and space needed for research/scholarship/artistic activity, teaching, outreach, and administrative and support services;

b) how widely are these resources available and <u>how broadly and/ or frequently are they used</u>?

4) <u>Retention:</u> The University's ability to <u>keep</u> top quality faculty and staff might be measured by looking, for example, at who leaves, the reasons top quality faculty and staff leave, and where they go.

Results for this measure should be broken out for all underrepresented groups, as well as for different faculty and staff groups.

Issues/Considerations in Measurement:

<u>Questions include:</u>

1) are there other important elements of the faculty and staff experience that should be considered for measurement;

2) to what extent are there unique measures for faculty and staff experiences;

3) how could the quality of staff recruited to the University be measured;

4) at what intervals/how often should satisfaction be measured;

5) if only one or two measures can be used, what should they be; and

6) at what levels should the results of this kind of measure be collected and reported?

Facilities

Relation to U2000:

The University will continue to demonstrate that it is an active and responsible steward of its resources, including its physical environment. In the strategic areas of research, undergraduate education, and user-friendliness, U2000 stresses the importance of an appropriate physical environment where all members of the academic community can work to their fullest potentials. On the broadest level, the University must exercise stewardship for its physical (as well as financial) resources. This means building a campus environment that is <u>physically appropri-ate—physically accessible, environmentally sound, attractive, safe, secure</u>, and <u>useful for research and for modern educational techniques</u>; an environment that <u>encourages students to remain on campus, facili-tates interaction</u> among students, faculty, and staff, and is <u>responsive to needs</u> of a changing population. More specifically, U2000 stresses the importance of <u>enhancing the research environment</u> and increasing substantially the University's investment in the research infrastructure, including libraries, laboratory space, instrumentation, computers, and information-transfer technologies; and showing <u>institutional support for teaching</u> by providing high-quality classroom facilities, libraries, informal discussion spaces, study facilities and appropriate technology.

Relation to other measures:

Other related critical measures include *student experience, faculty and staff experience,* and *underrepresented groups/diversity.*

Possible focus of this measure:*

This measure is intended to focus broadly on the facilities and infra-structure needed to support the University's research and discovery, teaching and learning, and outreach and service missions. Two impor-tant aspects that should be addressed are:

1) <u>Preservation/Renovation and Renewal:</u> Important elements include;

    a) <u>renewal and adaptation</u>, including deferred renewal and invest-ment in physical plant;

    b) <u>operating (industry) standards</u>; and

    c) <u>adherence to Master Plan</u>.

2) <u>Functionality:</u> Important elements include:

    a) <u>access</u>, including both transit and parking, and disability access;

    b) <u>safety</u>—personal, environmental, and occupational;

    c) <u>utilization</u>—use of space for instruction, research, and support, and;

    d) <u>technology</u> for enhancing productivity and effectiveness in learning, research, and teaching, including <u>access</u> to technology and information (infrastructure) in classrooms, libraries, labs, and offices; and <u>hardware & software</u> needs.

Issues/Considerations in Measurement:

<u>Questions include:</u>

1) what are the most important aspects of the "facilities" measure;

2) are there other important areas not listed in the outline above;

3) should the name of the measure be expanded to "Facilities/Infrastructure" or "Facilities/Technology;"

4) if only one or two measures can be used, what should they be;

5) at what levels should the results of this kind of measure be reported, and;

6) to what extent should the impact of facilities/infrastructure on people be measured as part of this measure, vs being included in other critical measures that address the experience of students, faculty, staff, and other users of University services?

* The general areas suggested were developed through consultation with staff from Facilities Management, Health and Safety, and Academic Computing Services.

Resource Development

Relation to U2000:

U2000 recognizes that acquiring the necessary resources to achieve plan goals will be critical to the success of the plan and will depend on a balanced strategy incorporating new sources of revenue, including private support, and more efficient use of existing resources.

Relation to other measures:

Other directly related critical measures are *sponsored funding* and *investment per student;* indirectly, resource development is related all of the fifteeen other measures.

Possible focus of this measure:

Two areas seem important to focus on in this measure:

1) Development/Fund Raising: Measures currently used by the University of Minnesota Foundation for measuring performance include:

   a) new gifts and pledges ("gift production");
   b) total gift dollars received;
   c) gifts by type of donor;
   d) purpose of gifts;
   e) ability to exceed goals set for specific campaigns or colleges;
   f) successes in "courting" major donors; and
   g) alumni giving

Other possible measures not currently used by the Foundation:

   a) voluntary support/FTE student (standardizes amounts across units/institutions);

   b) gift utility, defined as flexible (unrestricted) gifts;

   c) dollars expended per dollars raised (cost/benefit ratio that measures the effectiveness and performance of the fund raising function of an institution); and

   d) percentage of education and general revenue from gifts (support leverage, measuring the importance of voluntary support in comparison to other sources of income).

2) <u>Investment Performance:</u> Four specific measures have been suggested for investment performance; they are currently monitored by the University Treasurer's office:

   a) growth of the Consolidated Endowment Fund (CEF);

   b) performance of CEF in comparison to market indexes;

   c) performance of other University funds (TIP and GIP) in comparison to market indexes; and

   d) debt management.

The general goal for these investment measures is to maintain the growth of funds for the future; to maintain the purchasing power of funds for operating revenue; and to reduce the cost of debt and borrowing.

Issues/Considerations in Measurement:

<u>Questions include:</u>

1) are there other important elements of "resource development" that should be included in this measure, such as revenue from the state, from user fees, etc.;

2) is it important to measure the extent to which private gifts and/or funds contribute to the primary mission and strategic directions of University 2000 (i.e., are we effectively targeting both sources and beneficiaries);

3) what are the most important aspects of this measure;

4) if only one or two measures can be used, what should they be; and

5) at what level (institutional, campus, college, department) should the results of this measure be reported?