

Oregon **TECH**

2016 Oregon Tech Board of Trustees

University Strategic Dashboard

Oregon Tech
February 22, 2016
Laura McKinney ₁

Outcomes

Assessment of approach and organizational engagement in the dashboard,
by showing how this dashboard was defined and developed.

Assessment of the current dashboard, by reviewing indicators and measures.

Outline of where we are going next in using the dashboard,
by identifying data and process next steps.

How did we define a dashboard? What approach did we take?

DASHBOARD BACKGROUND

- Highlight issues ahead of time.



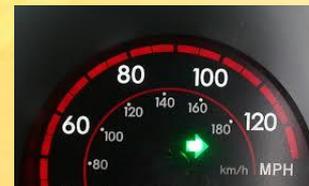
- Unify action around strategies.



- Help motivate decisions and action.



- Communicate with stakeholders.



Effective dashboards...

Property	Standard
Simple and clear.	One page.
Forward looking.	Leading measures, not coincident or lagging.
Visual and builds insights.	Graphical.
Meaningful and relevant. Answers key questions.	Stakeholders say yes.
Balanced.	Measures from all perspectives.
Reflects organization strategy.	Measures reflect differentiation.

Assessing a dashboard...

- Would this data cause me to change action or approach?
- Does the data give me an idea about what to do next?
- Are there things that I watch now that aren't on this dashboard?
- Does this dashboard reflect what is most important to Oregon Tech?

Good dashboards are not...

- Measuring every detail
- Report cards
- Necessarily rolled up from lower levels
- Static
- Adopted from other institutions
- Based on what is easy to count
- Targeted at “controlling, justifying, auditing or determining *who* went wrong”*

**Transforming Performance Measurement:*

Rethinking the Way We Measure and Drive Organizational Success

Dean R. Spitzer

Performance measurement cycle



*Transforming Performance Measurement:
Rethinking the Way We Measure and Drive Organizational Success*

Dean R. Spitzer

Indicators and measures

Indicator: an area that can predict the future.

Measure: what we select to assess the indicator.

Guidance heeded...

- **“Too many executives and other managers think it is sufficient just to track generic or standard *industry approved* measures.**
These are what I call “routine measures,” and they are satisfactory for maintaining the status quo, but not for taking the organization to the next level. They are like your body’s “vital signs”—important, but they won’t get you to the pinnacle of health; they are not differentiators. Similarly, an organizations routine measures are not differentiators.
- **How can any organization differentiate itself from the competition while measuring exactly the same things as the competition?**
There is nothing wrong with routine measures—every organization needs them to survive—but that’s not what we are concerned with here.
- **Management needs to focus its attention on the measures that really drive the performance of their particular organization.**
When “everything” is important, there is nothing that is *most important*. According to Bob Phelps, “Most managers are in fact overwhelmed by measures and data—but these have not improved their performance. Why? Because companies have taken the easy option and selected lots of poor measures instead of a few good ones.”

Transforming Performance Measurement:

Rethinking the Way We Measure and Drive Organizational Success

Dean R. Spitzer

How did we define a dashboard? What approach did we take?

CANDIDATE DASHBOARD

How did we inform our dashboard work?

- Used our strategies as a framework for identifying the most significant areas to measure.
- Examined what we already measure and use to guide decisions.
 - Inventory of initiatives and related measures
 - Existing reports
- Researched approaches used to build effective dashboards.
 - Existing university dashboards
 - Balanced scorecard
- Acknowledged that this would be a work in progress and that it will undergo successive refinement as we learn.

From where did we draw strategic guidance?

- **Strategic Action Plan 2020**
 - **#1 Student Success:** Deliver applied, hands-on educational experiences that provide students with the technical, critical thinking, and communication skills needed to succeed in and contribute to their chosen fields.
 - **#2 Faculty and Staff Success:** Attract and retain first-rate faculty and staff who are passionate about teaching and the student-focused educational mission of the university to graduate globally competitive professionals, as well as engage in industry outreach, scholarship and service to the university.
 - **#3 Economic Development and Workforce:** Contribute in significant ways to Oregon’s competitive strength, global-market advantage, and diverse industries by preparing new generations of engineering, technology, allied-health, management and applied arts and sciences professionals through Oregon Tech’s applied degree programs.
 - **#4 Access and Diversity:** Improve student educational access, the university environment and employment opportunities for diverse and historically underserved populations in Oregon, in order to ensure equity in our provision and delivery of education, and to lead and serve as a community example and resource for an inclusive, diverse campus environment in all respects.
 - **#5 Financial Success:** Manage university fiscal, capital and physical resources to sustain and enhance financial viability, and allow Oregon Tech to invest in new opportunities that serve our students and mission, prepare us for unanticipated events, and maintain and improve the quality of our programs, human resources, and public mission.
- **Academic Strategic Master Plan**
- **Strategic themes from the Board**
 - **Relevant, hands-on, real-world and accessible** education opportunities for students.
 - **Business-savvy** university: “outside in”, not “inside out.” Understand and build to business value.
 - **Brand match: We are known for what we truly are. Differentiate based on strengths.** Strong congruence between brand, actions and results. Be the best us we can be. Don’t chase the crowd.
 - **Stand strong with the reality of declining state support.** Build resilience beyond state funding sources.
 - **Build a culture of collaboration,** excitement, brand identity and pride with students, faculty, staff, alumni, and community stakeholders.

What are the key questions?

- ***Are we providing a relevant, valuable, and accessible education*** for our diverse students?
- ***Are we responding effectively*** to the needs of Oregon's industry?
- ***Are we thriving***, so that we may continue on our mission for years to come?
- ***Are we producing maximum value*** by ensuring our limited resources going as directly as possible towards the student mission?
- ***Are we nurturing the people and investing in the resources*** to ensure capability to deliver on our mission?

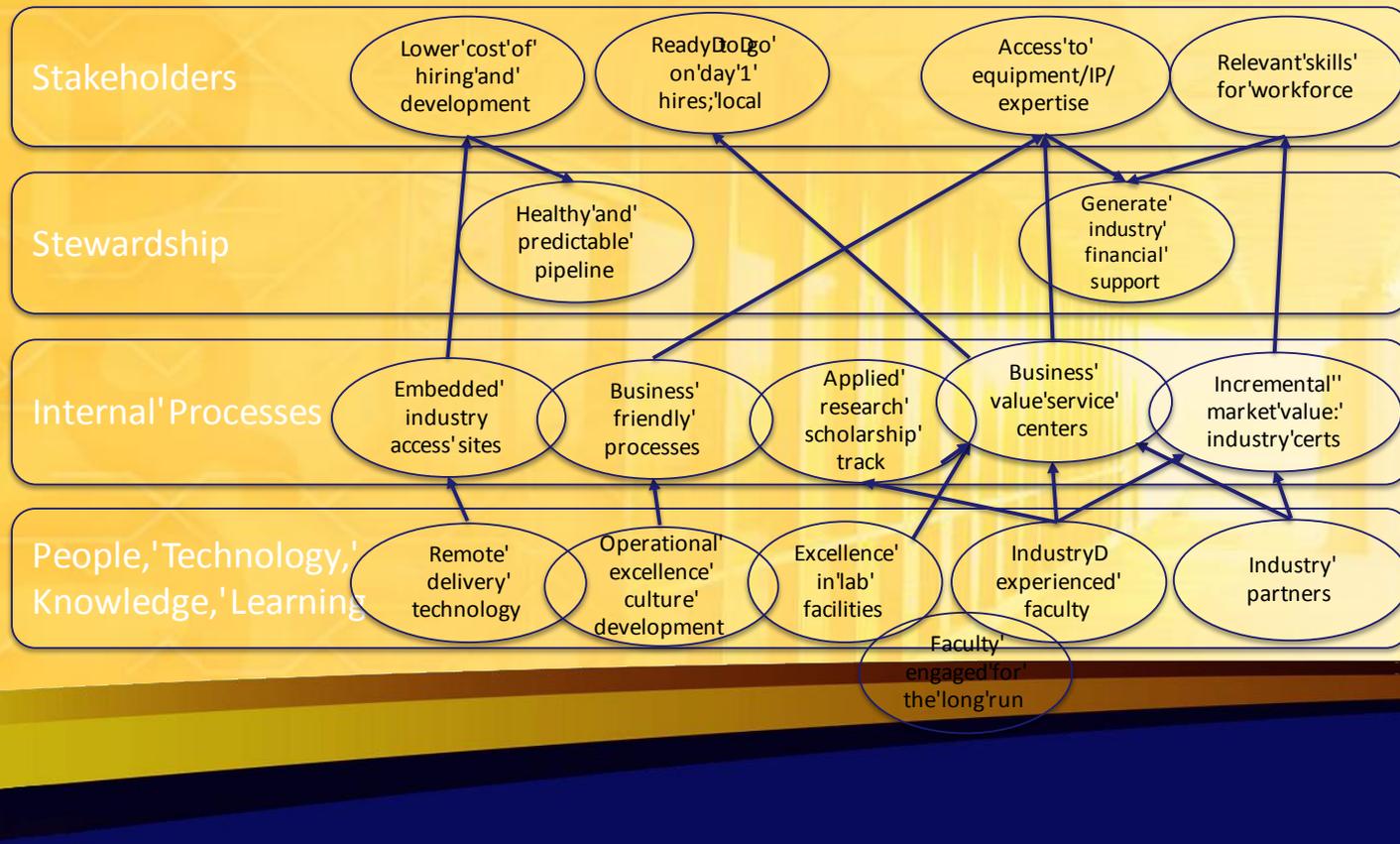
How did we select indicators and measures?

1. Ensured coverage of indicators through current indicator inventory and crosswalks with strategy documents.
2. Highlighted key indicators using strategy maps.
3. Identified possible measures for indicators by examining current measures and postulating new measures.
4. Engaged the entire executive staff to review and cull candidate strategic indicators and measures.
5. Retained the indicators/measures for possible use in operational dashboards.

Finding indicators through strategy maps

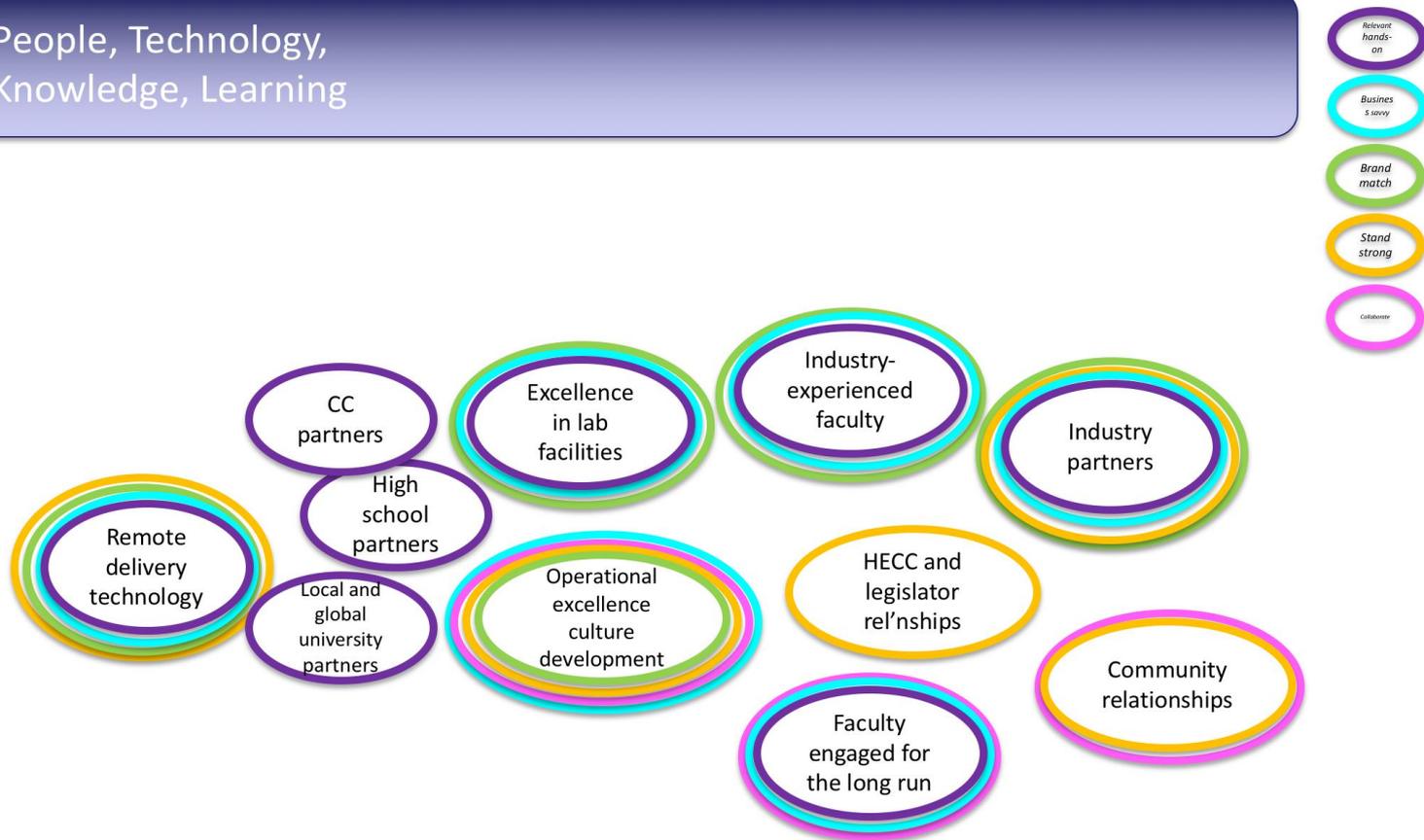
Business'savvy university:'

"outside'in", 'not' "inside'out.'"Understand' and'build'to'business' value.



Overlaying multiple strategy maps highlights key indicators

People, Technology,
Knowledge, Learning



#1 Student Success: *Inventory of possible indicators and measures*

Indicator	Candidate measures
Academic progress	
	Variety of efficient pathways to completion
	Student/faculty class ratio
	Credit counting oppys
	Student support
	Retention year over year
	Student survey: how well is OIT helping with your barriers to education?
	Student survey: what is your confidence in on-time completion?
	Student engagement: NSSE (freshman/senior)
	Degrees awarded (by campus)
	Who completes by area (on/off campus; by campus...)
Graduate success	
	Job/continuing ed % after grad
Job readiness	
	Industry certificates earned during education
	% students who have had internships/externships or other experiential learning
Enrollment pipeline	
	Funnel size/conversion, yield or transfer rates
	Pre-college program participation
	HS relationship depth/breadth
	# of articulation agreements
	Community college relationship depth/breadth
Academic quality—degree value	
	Student net promoter score (would you recommend to family or close friend?)
	Student survey: assessment of education value
	Median starting salary
	Mid-career salary
	Pass rate for credentials/licensure
	% accredited programs or % of accreditation reviews with no findings

Selected candidate indicators

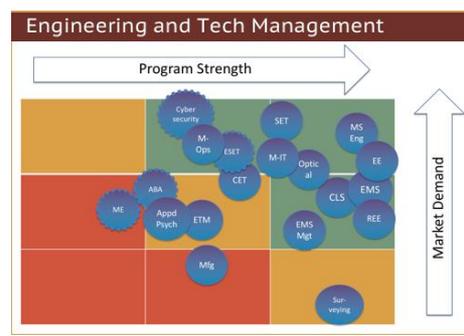
Goal	Indicator	Candidate measures
1 Student Success		
	Academic progress	Retention year over year
	Graduate success	Job/continuing ed % after grad
	Job readiness	% students who have had internships/externships or other experiential learning
	Enrollment pipeline	Funnel size/conversion, yield or transfer rates
2 Faculty Staff Success		
	Satisfaction	Faculty/Staff: Engagement survey
	Growth and development	Prof development funding
	Welcoming work environment	Faculty and staff assessment (survey)
3 Econ Workforce		
	Workforce	Labor market relevance of programs
4 Access Diversity		
	Reflects Oregon population	Funnel size/conversion or transfer rates
	Reflects Oregon population	Student enrollment by outcomes funding groups: first gen, Pell, STEM etc.
	Financial access	% debt to projected income ratio
5 Financial Success		
	Operational efficiency	Revision of obsolete, redundant... operations (\$ savings)
	Institutional stability	Positive operating budget
	Program efficiency	Program "net" or marginal value/break-even or better
	Appropriate facilities	% space utilization
	Enrollment pipeline	Funnel size/conversion, yield or transfer rates
	Foundation	Endowment growth rate/new money

Workforce(#1,#3(Stakeholder(
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- ! Are we providing education that meets employer needs?
- ! How strong are our programs relative to the market demand?
- ! Are we competitive in specific markets?

Labor(market(relevance(of(programs(Yearly(Leading(
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Watching labor market forecasts specific to career fields helps direct internal investments to grow programs providing for future needs and reduce or eliminate those where the market is poor.



!
!
!
!
This data is being gathered.!
!
Evaluation is clear based on placement... closer to upper right the better.!

Other measures considered:!

- Inone

Labor(projections(by(carrier(against(program(strength(Current(Absent(OED/OTC(Survey(
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Labor market forecasts by specific career fields is readily available from the Oregon Employment Department and the Oregon Talent Council. Determining program strength should be an internal measure based on self-assessment in key areas: number/strength of faculty, currency of equipment/facilities, reputation.

Assessment of currently available data!



- ! Include on quadrant dashboards (WVL, K Falls, Online, Extension).
- ! Include on program-level dashboards.

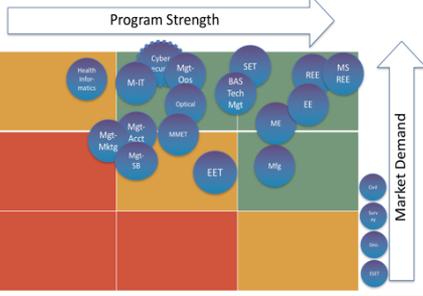
Evaluation of indicator and measure

Assessing a dashboard...

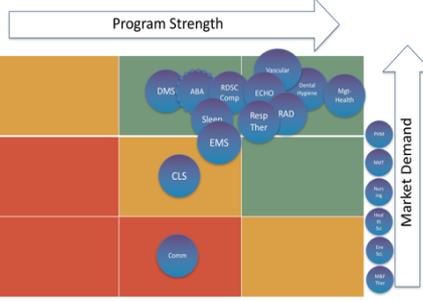
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Market

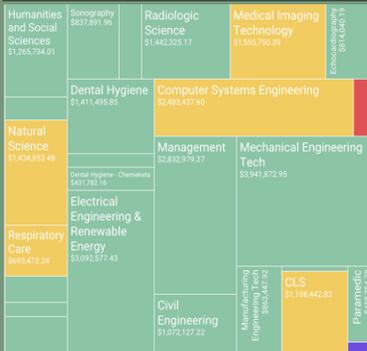
Engineering and Tech Management



Allied Health and Arts/Sciences



Program margins



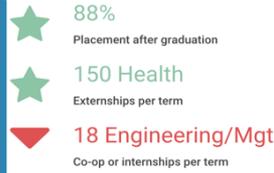
Endowment Growth



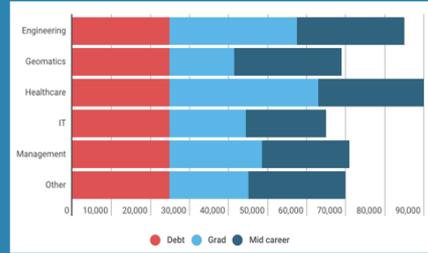
Financial

Students

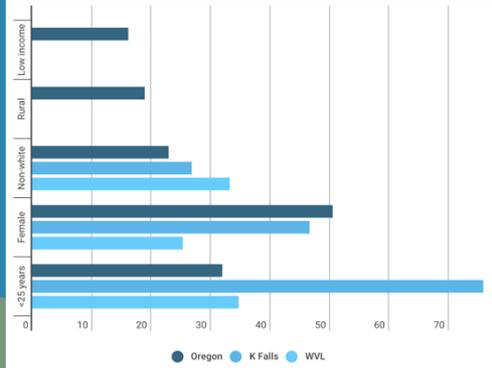
Job Ready



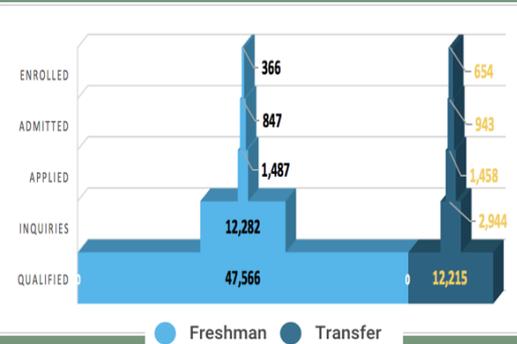
Student Debt to Projected Income Ratios



Students Reflect Oregon

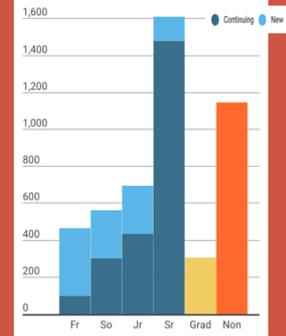


Enrollment Pipeline



Internal

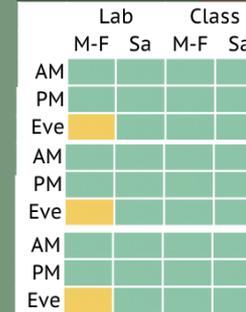
Student Retention



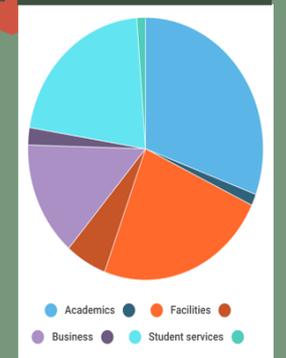
Job Satisfaction



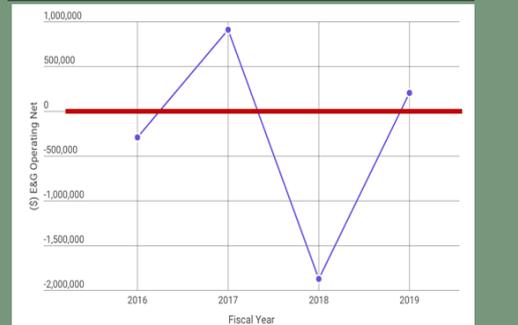
Facility Utilization



Ops Efficiency

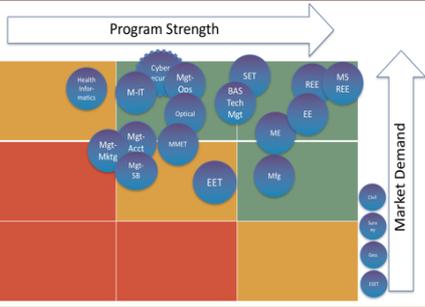


(\$) E&G Operating Net

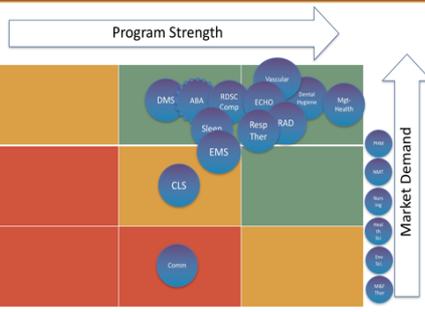


Market

Engineering and Tech Management



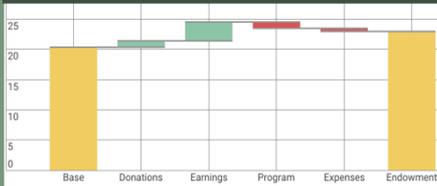
Allied Health and Arts/Sciences



Program margins



Endowment Growth



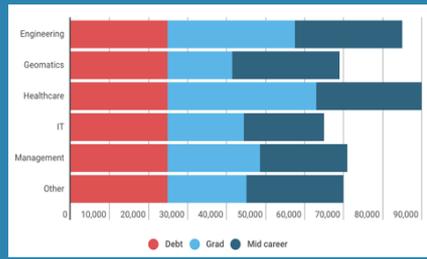
Financial

Students

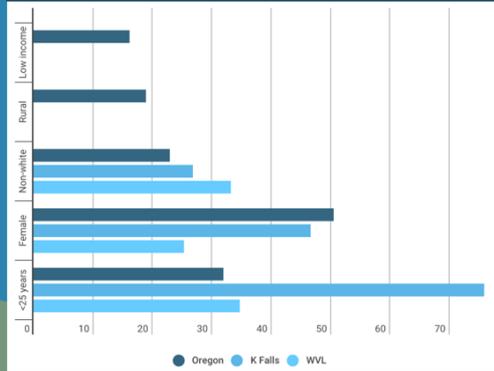
Job Ready

- ★ 88% Placement after graduation
- ★ 150 Health Externships per term
- ▼ 18 Engineering/Mgt Co-op or internships per term

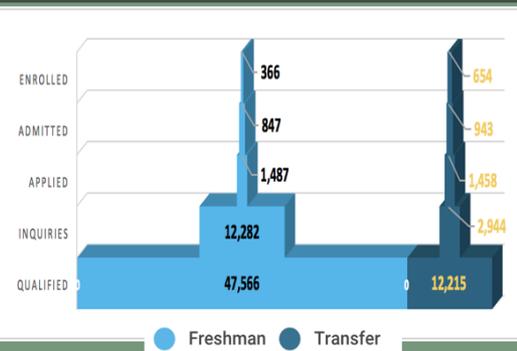
Student Debt to Projected Income Ratios



Students Reflect Oregon

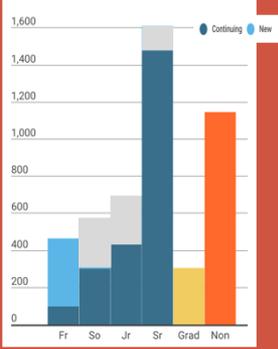


Enrollment Pipeline



Internal

Student Retention



Job Satisfaction



★ \$89,000 Professional Development for ?? people

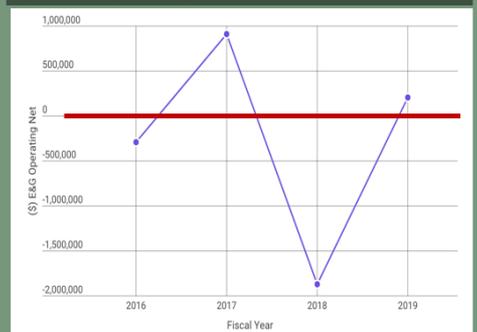
Facility Utilization

	Lab		Class	
	M-F	Sa	M-F	Sa
AM				
PM				
Eve				
AM	32%	0%	31%	0%
PM	37%	0%	31%	0%
Eve	74%	0%	23%	0%
	M-F	Sa	M-F	Sa
AM	32%	0%	31%	0%
PM	37%	0%	31%	0%
Eve	74%	0%	23%	0%

Ops Efficiency



(\$) E&G Operating Net



Next steps...

- **Make it automatic, reliable and accurate.** Improve the data for the projected dashboard and populate.
- **Make it relevant in action.** Include lifecycle performance management processes to use the dashboard in practice. Evolve the culture of measurement internally.
- **Build operational dashboards.** Inform the strategic dashboard by functional area:
 - Academic area is moving through the same process to identify operational dashboard.
 - Faculty and staff development in the creation and use of dashboards.

Did we achieve outcomes?

Assessment of approach and organizational engagement in the dashboard,
by showing how this dashboard was defined and developed.

Assessment of the current dashboard, by reviewing indicators and measures.

Outline of where we are going next in using the dashboard,
by identifying data and process next steps.