Overview of the Annual Institutional Update (AIU)

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Sr. Dir. for Research
How did we get here?

- Standards for Accreditation and Requirements of Affiliation (Fall 2014)

- New process (Fall 2016)
  - AIU
    - Data
    - Update on recommendations from the commission
  - MPPR
    - Peer review of AIU data and recommendation updates

- Use existing data
Defining “here”

- MSCHE rolling out new process
- New Research Unit within MSCHE
- Data is out there (IPEDS, Score Card, Student Financial Aid, etc.)
- Plan to integrate data into accreditation processes
Defining “here” and looking forward

- **The Goal:**
  - An accurate measurement of Institutional health (focused on Student Achievement and Financial Health)

- **Here now:**
  - Available metrics used to measure Student Achievement and Financial Health.

- **Looking Forward** development of improved metrics to achieve the goal
  - Part-time student graduation rates (IPEDS)
  - Transfer rates (NSC)
  - Completion after transfer rates (NSC)
AIU (Annual Institutional Update)

- **IP**
  - Large set of metrics
  - Definitions shifted over the years
  - Organically grown
  - Primary focus was to monitor institutions
  - Comparisons: current year to previous year

- **AIU**
  - Only metrics that show promise in achieving the goal
  - Standardized definitions
  - Clear goal to use the data (MPPR)
  - Always examine 5-year trend
  - Includes update reports on recommendations
MPPR (Mid-Point Peer Review)

- Occurs 4 years before the next Self-Study Review
- Review of 4 years of AIU collections
  - All mandatory data
  - Only those “additional MPPR metrics” the institution has chosen
- Both “parts” (data report and updates) reviewed by peers
- Institutions receive feedback from peer reviewers
AIU Data Report

- **Context**
  - Data to provide MPPR peer-reviewers with context of the institution

- **Student Achievement**
  - Graduation rates
  - Loan repayment
  - Loan default

- **Financial Health**
  - Financial Ratios
  - Components of Ratios
  - Financial Uploads

- **Optional Uploads**
  - (e.g., Licensure Exam Pass Rates, Career placement data, NSC student tracker data, etc.)
AIU: Context

- To provide context for MPPR peer reviewers the AIU will include:
  - Location (longitude and latitude)
  - Carnegie Classification
  - Link to website
  - Catalog
  - Enrollment (headcounts)
    - Graduate / Undergraduate
    - Full- and Part-time
    - Fall / 12-month
    - Race / Ethnicity
    - Age of students (18-24, 25-64, 65+)
    - Pell recipients
    - Distance Ed (none, some, all)
AIU: Context cont.

- To provide context the AIU will include:
  - FTE
  - %FTFT
  - Programs Offered
    - Distance
## AIU: Context

### Website
- yeshivaofnitra.org

### Carnegie Classification
- Associate's - Private For-profit

### Control
- Private for-profit

### Assoc. System or Company

### Religious Affiliation
- African Methodist Episcopal

### Degree Offerings

<table>
<thead>
<tr>
<th>Collection Year</th>
<th>Less than 1-year certificate</th>
<th>Associates Degree</th>
<th>Two but less than 4-year certificate</th>
<th>Bachelor's degree</th>
<th>Post-bac. Certificate</th>
<th>Masters degree</th>
<th>Post-masters certificate</th>
<th>Doctor's degree - research/scholarship</th>
<th>Doctor's degree - professional practice</th>
<th>Doctor's degree - other</th>
<th>Other degree</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>2012</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>2013</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>2014</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>2015</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Collection Year
- Continuing professional, Educational or Ancillaries, High School courses
In Development
AIU: Student Achievement

- Graduation Rates 150%
  - Race/Ethnicity
  - Gender

- GR200
  - 200% graduation rate
  - Transfer rate
AIU: Student Achievement cont.

Retention Rate

Graduation Rate 200% and 150%

150% Graduation Rate by Race/Ethnicity

Graduation and Transfer Rate (2-year ONLY)
AIU: Financial Health

- Primary Reserve Ratio
- Viability Ratio
- Return on Net Assets Ratio
- Operating Revenues Ratio
- Net Income Ratio
- Debt Burden Ratio
- Tuition Discount Ratio
- Tuition Dependency Ratio
AIU Annual process:

- *Spring
  - IPEDS preliminary data and other data sources uploaded by MSCHE staff to populate the institution’s portal early April
  - AIU open for data collection April/May

*Member institutions were informed February 2018 that the development of a new online portal system has pushed the AIU collection back for the 2018 year only. This presentation provides the regular cycle of the AIU as it will be in 2019 onward. The last slide of this presentation provides an overview of the modified 2018 year collection.
How it will work:

- April
- Login to Portal and review the data
How it will work:

- **Institution Portal**
  - New MSCHE system which will be the primary conduit for engaging MSCHE for:
    - Self Study
    - Sub-Change
    - Completion of the AIU
    - And more
How it will work:

- April
  - Current and historical AIU data will be available in the portal year round
    - AIU will only be editable for a few weeks each year
  - AIU Data will be entered for each unique IPEDS ID
How it will work:

- Review the pre-populated data
- Either on the screen
- Or in the download

### Fall Enrollment Race-Ethnicity Percentages

<table>
<thead>
<tr>
<th>Race-Ethnicity</th>
<th>Current Year</th>
<th>Prior Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaskan Native</td>
<td>50%</td>
<td>40%</td>
</tr>
<tr>
<td>Asian</td>
<td>48%</td>
<td>38%</td>
</tr>
<tr>
<td>Asian-Native Hawaiian-Pacific Island</td>
<td>47%</td>
<td>37%</td>
</tr>
<tr>
<td>Black / African-American</td>
<td>44%</td>
<td>34%</td>
</tr>
<tr>
<td>Hispanic-Latino</td>
<td>42%</td>
<td>32%</td>
</tr>
<tr>
<td>Native Hawaiian or Pacific Island</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>White</td>
<td>32%</td>
<td>22%</td>
</tr>
<tr>
<td>Two or more races</td>
<td>34%</td>
<td>24%</td>
</tr>
<tr>
<td>Non-resident alien</td>
<td>38%</td>
<td>28%</td>
</tr>
</tbody>
</table>

### Fall Enrollment Age Percentages

<table>
<thead>
<tr>
<th>Age</th>
<th>Current Year</th>
<th>Prior Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>25-64</td>
<td>36%</td>
<td>26%</td>
</tr>
<tr>
<td>65+</td>
<td>34%</td>
<td>24%</td>
</tr>
</tbody>
</table>

12-Month Enrollment
How it will work:

- What if my institution doesn’t complete IPEDS?
  - Blocks will be empty and you will enter the data.
How it will work:

- Variances on certain measures will trigger a required response to explain the change in the data over the years.
How it will work:

- Every variable will have a brief explanation.
How it will work:

- Every variable will have
  - a brief explanation
  - a complete definition

Number of programs offered via distance education

- **Source:** IPEDS Completions, CIP Data
- **Variable/Calculation:** SUM(PTOTALDE)

**Definition:** Number of programs offered via distance education is the sum of all programs offered via distance education.
- Distance education program - a program for which any required coursework for program completion is able to be completed via distance education courses.
How it will work:

- Additional Support
  - Online Chat help with Research Unit staff
- Email support system: support@msche.org
How it will work:

- Errors in pre-populated data mean one of two possibilities:
  - 1. Erroneous data was uploaded to IPEDS
     - First check IPEDS to see if values are identical
     - If IPEDS is the same as MSCHE portal then the change needs to be made with IPEDS
  - 2. There was an error with the upload process:
     - If the IPEDS data and the MSCHE data do not match, contact the MSCHE research unit
How it will work:

- All metrics are required during the AIU
- Not all AIU metrics will be part of the MPPR
How it will work:

- For a group of metrics, it is up to the institution if they are included in the Mid-Point Peer Review, and thus visible to peer reviewers during that process.
- Including metrics in the MPPR will be made on the first AIU following Self-Study.
- For 2018 all institutions will select which metrics to include for their next MPPR.
Metrics institutions can choose to be part of peer review

- Context
  - % Developmental
  - % First Generation
  - % Minority
  - % Non-traditional
  - % Part-time
  - % Pell
How it will work:

- Even if your institution completes IPEDS there are some additional data that will be required.
  - Fall IPEDS cohort
    1. % Developmental
    2. % First-generation
  3. Catalog
  4. Fall Dual Enrollment headcount
  5. Student Achievement webpage
  - IPEDS Fiscal Year
    6. Depreciation Expense
  - Most Recent Audit
    7. Net Assets Start of Year
    8. Adjustment to Start
    9. Net Assets End of Year
How it will work:

- Beyond the numbers the AIU also requires some uploads:
  - The exact uploads required from your institution will depend on the Control, and other characteristics.

- Audited Financials
- Title IV Compliance Audits
- USDE Composite Score letter
- Bond rating for New Debt issued
- Financial audit from parent corporation(s)
How it will work:

- In addition to all of the metrics already discussed, an institution can upload, up to 3, additional documents concerning Student Achievement.
How it will work:

- In addition to all of the metrics already discussed, an institution can upload, up to 3, additional document concerning Student Achievement.
  - The format of these documents should be data reports, graphs, or tables with minimal narrative.
  - Each document less than 30 pages

- These additional data files will be available to peer reviewers during the MPPR

Some possible examples of reports an institution might want to consider uploading:

- Voluntary Framework of Accountability (VFA) Annual Reports
- Student Achievement Measure (SAM)
- National Student Clearinghouse reports
- Licensure Exam Pass Rates
- Graduate Survey Results
- Career placement
- Etc.
Timeline for 2018 **ONLY**

- March/April
  - AIU Data Dictionary available on MSCHE website

- May-July we suggest institutions
  - Determine what metrics to include in the MPPR?
  - Use the data dictionary to gather/calculate AIU metrics
  - Collect necessary uploads

- August institutions gain access to MSCHE Portal system
  - Engage training videos

- End of August
  - AIU opens for data entry