



Overview of the Annual Institutional Update (AIU)

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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 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.)

How it will work:

➤ April

➤ Login to Portal and review the data



CHE MSA | Dashboard | Institution Profile | Key Contacts | Locations | **Annual Update** | Reviews | Evidence | Welcome: Test CEO Exceptionally

Annual Update
Annual Update Collection Year: 2017 | Data for Academic Year 2015-2016

IPEDS ID: 131801 | IPEDS ID: 131802 | IPEDS ID: 131803 | IPEDS ID: 131804 | [Export to .CSV](#)

General Information | IN PROGRESS ⌚

IPEDS ID: 131801	Student Right to Know Website: test.right.com	Religious Affiliation: Some Religious Affiliation
Website: www.strayer.edu/district-columbia/washingtonTEST	Control: Private (for-profit)	Open admission policy: No
Carnegie Class: Doctoral Universities	Calendar: Semester	Catalog:
Carnegie Size: Four-year, large, primarily nonresidential		
Highest Degree: Doctor's degree		

In Development

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

The screenshot displays the MSCHE Institution Portal interface. At the top, there is a navigation bar with the following tabs: Dashboard, Institution Profile (highlighted in red), Key Contacts, Locations, Annual Update, Reviews, and Evidence. The user is logged in as 'Test CEO Ex'. Below the navigation bar, the 'Annual Update' section is active, showing a dropdown menu for 'Annual Update Collection Year' set to '2017' and 'Data for Academic Year 2015-2016'. There are four buttons for IPEDS IDs: 131801, 131802, 131803, and 131804. An 'Export to .CSV' button is located on the right. The main content area is titled 'General Information' and contains a table with the following data:

General Information		IN PROGRESS
IPEDS ID: 131801		
Website: www.strayer.edu/district-columbia/washingtonTEST	?	
Carnegie Class: Doctoral Universities	?	
Carnegie Size: Four-year, large, primarily nonresidential	?	
Highest Degree: Doctor's degree	?	
Student Right to Know Website: test.right.com	?	
Control: Private (Non-Profit)	?	
Calendar: Semester	?	
Religious Affiliation: Some Religious Affiliation	?	
Open admission policy: No	?	
Catalog:	?	

A large 'In Development' watermark is overlaid diagonally across the table.

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



The screenshot shows a web interface for an 'Annual Update' form. At the top, it says 'Annual Update'. Below that, there is a label 'Annual Update Collection Year:' followed by a dropdown menu showing '2017'. To the right of the dropdown is the text 'Data for Academic Year 2015-2016'. Below this, there are four yellow buttons with black text: 'IPEDS ID: 131801', 'IPEDS ID: 131802', 'IPEDS ID: 131803', and 'IPEDS ID: 131804'. An orange arrow points down to the '2017' dropdown, and another orange arrow points up to the 'IPEDS ID: 131801' button. A large, semi-transparent watermark 'In Development' is overlaid on the bottom right of the form area.

How it will work:

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

The screenshot shows an Excel spreadsheet with the following data:

Row	Institutional Context	Value
16	Institutional Context: Fall Enrollment Headcounts: Part-Time	416
17	Institutional Context: Fall Enrollment Headcounts: FTE	443
18	Institutional Context: Fall Enrollment Race-Ethnicity Percentages: Alaskan Native	50
19	Institutional Context: Fall Enrollment Race-Ethnicity Percentages: Asian	48
20	Institutional Context: Fall Enrollment Race-Ethnicity Percentages: Asian-Native Hawaiian-Pacific Islander	47
21	Institutional Context: Fall Enrollment Race-Ethnicity Percentages: Black / African-American	44
22	Institutional Context: Fall Enrollment Race-Ethnicity Percentages: Hispanic-Latino	42
23	Institutional Context: Fall Enrollment Race-Ethnicity Percentages: Native Hawaiian or Pacific Islander	40
24	Institutional Context: Fall Enrollment Race-Ethnicity Percentages: White	32
25	Institutional Context: Fall Enrollment Race-Ethnicity Percentages: Two or more races	34
26	Institutional Context: Fall Enrollment Race-Ethnicity Percentages: Non-resident alien	38
27	Institutional Context: Fall Enrollment Age Percentages: 18-24	38
28	Institutional Context: Fall Enrollment Age Percentages: 25-64	36
29	Institutional Context: Fall Enrollment Age Percentages: 65+	34
30	Institutional Context: 12-Month Enrollment: Unduplicated Headcount	468
31	Institutional Context: 12-Month Enrollment: Unduplicated Undergraduate Headcount	466
32	Institutional Context: 12-Month Enrollment: 12-month FTE	470
33	Institutional Context: Distance Education Headcounts: Programs Offered via distance	418

Fall Enrollment Race-Ethnicity Percentages

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

Fall Enrollment Age Percentages

Age	Current Year	Prior Year
18-24	38%	28%
25-64	36%	26%
65+	34%	24%

12-Month Enrollment

In Development

How it will work:

- What if my institution doesn't complete IPEDS?
 - Blocks will be empty and you will enter the data.

Fall Enrollment Race-Ethnicity Percentages		
Race-Ethnicity	Current Year	Prior Year
Alaskan Native	<input type="text"/>	
Asian	<input type="text"/>	
Asian-Native Hawaiian-Pacific Islander	<input type="text"/>	
Black / African-American	<input type="text"/>	
Hispanic-Latino	<input type="text"/>	
Native Hawaiian or Pacific Islander	<input type="text"/>	
White	<input type="text"/>	
Two or more races	<input type="text"/>	
Non-resident alien	<input type="text"/>	

In Development

Fall Enrollment Age Percentages		
Age	Current Year	Prior Year
18-24	<input type="text"/>	
25-64	<input type="text"/>	

How it will work:

- Variances on certain measures will trigger a required response to explain the change in the data over the years

Institutional Context			COMPLETE ✓
Fall Enrollment Headcounts			
Type	Current Year	Prior Year	Reason For Variance
Total	408	308	treqdsfa
Full-Time	445	315	
Part-Time	416	316	
FTE	443	343	test

In Development

How it will work:

- Every variable will have
 - a brief explanation

Distance Education Headcounts

Type	Current Year	Prior Year	Reason For Variance	
Programs Offered via distance education	418	318	test	?
Total Headcount Distance Ed	404	304	test	?
Exclusively Distance Ed	439			?
Percent Exclusively Distance Ed	45.00%	35.00%		?
Some Distance Ed	435	335		?
Percent Some Distance Ed	40.00%	30.00%		?
No Distance Ed	437	337		?
Percent No Distance Ed	42.00%	32.00%		?
Correspondence Education Headcount	1			?
Number of Correspondence Education Programs	1			?

In Development

Number of programs offered via distance education

MORE



How it will work:

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

The screenshot shows a software interface with a list of variables on the left and a detailed definition window on the right. The list includes '12-Month Enrollment' and 'Distance Education Headcount'. The definition window is titled 'Number of programs offered via distance education' and contains the following information:

- **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 all the required coursework for program completion is able to be completed via distance education courses.

A large, semi-transparent watermark 'In Development' is overlaid diagonally across the definition window.

How it will work:

- Additional Support
 - Online Chat help with Research Unit staff
 - Email support system: research@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.*

Select Variables for Peer Reviewers to see

Percent First Generation:

Include in Peer Review

Dual Enrollment Headcount:

Include in Peer Review

Percent Developmental:

Include in Peer Review

Percent of all undergrads receiving Pell:

Include in Peer Review

Has Dual Enrollment

Include in Peer Review

Percent FT-FT receiving Pell:

Include in Peer Review

In Development



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 Documents to Upload

Audited Financials:

No file chosen

Management Letter:

No file chosen

Financial audits from parent corporations:

No file chosen

Bond Rating for new debt issues:

No file chosen

Title IV Compliance Audits:

No file chosen

USDE composite score letters:

No file chosen

In Development

- 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.

Context of Performance

If you believe that the data provided in the Student Achievement section does not appropriately represent the overall performance of your institution you may upload up to three additional artifacts, each no longer than thirty pages in length. These artifacts should provide data not prose (e.g., VFA, NESSE, Licensure exam pass rate, graduate surveys, career placement rates etc.).

Context of Performance 1:

No file chosen

Description of Contents (250 words max):

Context of Performance 2:

No file chosen

Description of Contents (250 words max):

Context of Performance 3:

No file chosen

Description of Contents (250 words max):

In Development

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.
 - 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.

Context of Performance

If you believe that the data provided in the Student Achievement section does not appropriately represent the overall performance of your institution you may upload up to three additional artifacts, each no longer than thirty pages in length. These artifacts should provide data not prose (e.g., VFA, NESSE, Licensure exam pass rate, graduate surveys, career placement rates etc.).

Context of Performance 1: <input type="button" value="Choose File"/> No file chosen	Description of Contents (250 words max): <input type="text"/>
Context of Performance 2: <input type="button" value="Choose File"/> No file chosen	Description of Contents (250 words max): <input type="text"/>
Context of Performance 3: <input type="button" value="Choose File"/> No file chosen	Description of Contents (250 words max): <input type="text"/>



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



Available Resources

- ▶ <http://www.msche.org/?Nav1=INSTITUTIONS&Nav2=IP>
- ▶ <http://www.msche.org/Documents/link%20from%20Home%20page%20April%201.pdf>



Questions?