

UNC System 2022-2027 Strategic Plan Metric Definitions and Change Log

This document contains definitions for the metrics that are used in the UNC System 2022 – 2027 Strategic Plan. Also included is Appendix A (List of Underserved Counties) and Appendix B (Change Log for System Strategic Plan Goals). Detailed technical definitions and code for replication have been provided to all institutions. For questions about these metrics, please contact Mark Umbricht (mrumbricht@northcarolina.edu)

List of Metrics

Adult Learner Enrollment
Military Enrollment
Underserved County Enrollment
4-Year Graduation Rate
Undergraduate Degree Efficiency
4-Year Graduation Rates for Students of Color and Pell Grant Status
Master's Degree Efficiency
Research and Scholarship Doctorate Degree Efficiency
Student Mental Health (Healthy Minds Survey)
Debt at Graduation for First-Time Students
Debt at Graduation for Transfer Students
Education and Related Spending Per Degree
Health Science & STEM Credentials
Graduates Working in NC Public Schools
Sponsored Research and Licensing
Military Partnerships
Employee Experience
Voluntary Turnover

Metric Definitions

Adult Learner Enrollment

Adult learner is defined as in-state and out-of-state, degree-seeking, certificate-seeking and non-degree, non-certificate seeking, undergraduate students that are age 25 or older at the start of the fall term at each institution.

Military Affiliated Enrollment

Military affiliated is defined as students that are 1) active-duty military or National Guard, 2) veterans of the armed forces or National Guard, or 3) Spouses or dependents of active duty or veterans. This count includes in-state and out of state, degree-seeking,

certificate-seeking and non-degree, non-certificate-seeking, and undergraduate and graduate students.

Underserved County Enrollment

This measure counts the number of degree-seeking undergraduate students and high school students at NCSSM and UNCSA enrolled from North Carolina counties that are a part of the “underserved counties” list. Underserved counties are defined as the 80 counties that are below the statewide college-going rate. College-going rates for each county were calculated using matched data from the National Student Clearinghouse that was provided by the Department of Public Instruction (DPI). College-going includes any postsecondary enrollment within one calendar year of high school graduation. Students who withdrew without completing a full term were not counted as attending that term. See Appendix A for a list of counties. More information on county level postsecondary enrollment rates can be found on My Future NC’s 2022 County Attainment Profiles. High school counts include students that are in-state residents and also reside in an underserved county.

4-Year Graduation Rate

This metric calculates four-year graduation rates for first-time, full-time, bachelor’s degree-seeking students starting in fall terms. The numerator includes those students who earned a baccalaureate degree from any accredited institution of higher education within four years. This includes the summer term of the fourth academic year. For example, a first-time, full-time student who begins in fall 2016 and earns a degree at any point up through August 31, 2020 will be counted as a “graduate” in the numerator.

The denominator is the number of first-time, full-time, bachelor’s degree-seeking students in a given fall cohort. This metric uses the adjusted IPEDS cohort and removes exclusions from the cohort if the exclusion occurred prior to the fourth fall term after the cohort’s initial term. National Student Clearinghouse data is used to identify graduation data from institutions outside of the UNC System.

Undergraduate Degree Efficiency

The number of undergraduate degrees awarded by an institution per 100 Full-Time Equivalent (FTE) undergraduates. “Degrees” includes associate and baccalaureate degrees as reported in an IPEDS completion year, which runs between July 1 of the start year through June 30 of the following year, consistent with the IPEDS Completions Survey. Dual degree recipients are counted twice and double major students are counted once, consistent with federal completions reporting. “FTE” is calculated as the sum of all student credit hours taken by degree-seeking undergraduate students in the current academic year (Summer II, Fall, Spring, Summer I) and then averaged across

the preceding 3 academic years. That average is then divided by 30, consistent with IPEDS reporting. Credit hours are only counted if they are reportable to IPEDS and the student is in a degree-seeking undergraduate career (not certificate-seeking). The FTE calculation uses a 4-year average to smooth enrollment fluctuations and the degree calculation uses 2-year average to smooth degree fluctuations.

4-Year Graduation Rates for Students of Color and Pell Grant Status

Graduation rates are calculated in the same manner as the overall 4-year graduation rate. This metric is disaggregated by race and ethnicity for students of color based on standard IPEDS definitions and Pell Grant status. Students of color include Black or African American, Hispanic or Latino, Native American, and Two or More Races. Pell recipient is defined as students who received Pell in their first financial aid year.

Master's Degree Efficiency

The number of master's degrees awarded by an institution per 100 Full-Time Equivalent (FTE) master's degree students. "Degrees" includes master's degrees as reported to IPEDS in a given academic year. Dual degree recipients are counted twice, consistent with federal completions reporting and only the first major per degree is counted. "FTE" is calculated as the sum of all student credit hours taken by degree-seeking master's degree students in the current academic year (Summer II, Fall, Spring, Summer I) and then averaged across the preceding academic year. That average is then divided by 24, consistent with IPEDS reporting for graduate students. The FTE calculation uses a 2-year average to smooth enrollment fluctuations and the degree calculation uses 2-year average to smooth degree fluctuations. Only two years of enrollments are used to reflect the shorter length of master's programs.

Research and Scholarship Doctorate Degree Efficiency

The number of doctoral research and scholarship degrees awarded by an institution per 100 Full-Time Equivalent (FTE) doctoral research students. "Degrees" includes doctoral research degrees as reported to IPEDS in a given academic year. This measure does not include professional doctorate degrees. Dual degree recipients are counted twice, consistent with federal completions reporting and only the first major per degree is counted. "FTE" is calculated as the sum of all student credit hours taken by degree-seeking doctoral research degree students in the current academic year (Summer II, Fall, Spring, Summer I) and then averaged across the preceding three academic years. That average is then divided by 24, consistent with IPEDS reporting for graduate students. The FTE calculation uses a 4-year average to smooth enrollment fluctuations and the degree calculation uses 2-year average to smooth degree fluctuations.

Student Mental Health (Healthy Minds Survey)

All institutions are expected by Spring 2027 to participate in the Healthy Minds survey, an annual study of student mental health on college campuses. With baseline data from this survey, institutions will create campus-level goals and strategies to improve student mental health. There are no formal metrics other than participation in the survey.

Average Cumulative Debt at Completion of Bachelor's Degree, First-Time Freshman

This metric calculates average cumulative federal loan debt for first-time, bachelor's degree completers reported in IPEDS Completions who originally entered the institution as in-state, first-time students. This metric includes first-time students who entered in fall, spring, or summer terms. The numerator includes the total sum of federal loan debt, excluding debt from Parent Plus loans, from when the student began through the financial aid year in which they completed their degree. Only debt accrued at the institution that granted the bachelor's degree in the completion year is included in this metric. The denominator is the number of in-state, first-time students who received a bachelor's degree within a given completion year, including those who did not accrue any debt. A completion year runs between July 1 of the start year through June 30 of the following year, consistent with the IPEDS Completions Survey. For example, a student who graduated July 2, 2018 with no debt would be counted as a 2018-2019 completer. Completers who first enrolled at the institution more than ten years prior to graduation are excluded from this metric.

Average Cumulative Debt at Completion of Bachelor's Degree, Transfer Students

This metric calculates average cumulative federal loan debt for bachelor's degree completers reported in IPEDS Completions who transferred from either a UNC institution or a North Carolina community college (NCCCS) and originally entered the institution as in-state transfer students. This metric includes transfer students who entered the institution at any class level. The numerator includes the total sum of federal loan debt, excluding debt from Parent Plus loans, from the time those students transferred into the institution to the time they graduated. The denominator is the number of in-state transfer students from NCCCS or UNC institutions who received a bachelor's degree within a given completion year, including those who did not accrue any debt. A completion year runs between July 1 of the start year through June 30 of the following year, consistent with the IPEDS Completions Survey. For example, a student who graduated July 2, 2018 with no debt would be counted as a 2018-2019 completer. Completers who first enrolled at the institution more than ten years prior to graduation are excluded from this metric.

Education and Related Expenses Per Degree

Education and related (E&R) spending per degree is a cost efficiency measure commonly used in higher education to understand the return on a university's financial investment in education as measured by an output of degrees awarded. All data points are pulled from IPEDS. The numerators calculated by summing the total expenditures on instruction, student services, and an allocated portion of academic and institutional support each year. The allocated portion is equal to expenditures on instruction and student services divided by the sum of instruction, student services, public service, and research. The denominator is the total number of undergraduate and graduate degrees awarded in that completion year. This includes bachelor's, master's, doctoral, and associate, degrees as well as post-baccalaureate and post-master's certificates. E&R focuses on the core costs of the educational enterprise, rather than considering other university missions with separate funding streams (research, public service) or auxiliary functions paid for from dedicated sources (housing, athletics, etc.).

This measure is created using IPEDS variables that are calculated by each institution. Components of this metric are also available publicly on the IPEDS website.

Health Science & STEM Credentials

This metric counts health science and STEM degrees and certificates meeting the minimum credit hour threshold previously used by IPEDS. This includes all major completions, not just first majors. Health science credentials include all CIP codes in the 2-digit 51 code (Health Sciences) and the six-digit codes of 018001 (Veterinary Medicine) and 018101 (Veterinary Sciences/Veterinary Clinical Services, General). STEM credentials include all CIP codes listed on the 2020 Department of Homeland Security STEM Designated Degree Program List. Any CIP codes starting with 51 (Health Sciences) on the DHS STEM list will be counted towards Health Sciences. Degrees are counted by fiscal year, so the 2020 degree count includes degrees conferred between July 1, 2019 and June 30, 2020, consistent with IPEDS reporting.

Graduates Working in NC Public Schools

This metric includes individuals that earned a degree or teacher licensure/certificate from a UNC institution (including undergraduate, graduate, or both) and are in their first year of employment at a public K-12 NC school as a 1) Teacher, 2) Assistant Principal, 3) Principal, and 4) Other. "Other" include those working in social services, health services, attendance counseling, guidance services, media services, nurses licensed through NCDPI, speech services, audiologists, school psychologists, teacher mentors, and instructional coaches/facilitators. In order to count as other certified personnel for a respective LEA, the individual needed to be paid at least 50% FTE in that role at a

school and/or at the LEA central office. Students earning credentials at multiple institutions prior to their first year of employment in the respective role (e.g. teacher, principal) are counted once for each institution's individual metric, but are not duplicated for the System level metric.

Data are collected and provided to the UNC System by the Education Policy Initiative at Carolina.

Sponsored Research and Licensing

This is the amount of revenue from research, development sponsored program awards, and licensing income in a given fiscal year. Reporting guidelines for sponsored program awards and licensing income are identical to those used in the annual UNC Report to the President on Research and Sponsored Programs. Non-research COVID dollars and inter-institutional awards are removed from this calculation.

Military Partnerships

Military partnerships include formal, signed partnerships agreements between the UNC System and a military affiliated organization. The agreement must be signed by senior leadership on both sides and include at least one of the following criteria:

1. UNC performs collaborative project(s) with the military partner organization
2. UNC performs sponsored R&D project(s) funded by DOD as a direct result of the partnership
3. UNC faculty, students, and/or staff participate in R&D efforts, internships, fellowships, research sabbaticals, teaching a course, etc. as a direct result of the partnership
4. UNC researchers utilize DOD equipment, or DOD donates R&D equipment to UNC
5. DOD personnel (uniformed and/or civilian) participate in UNC education or training courses
6. Partnership directly leads to increase in military student applications or enrollments, and/or increase in UNC DOD/VA education benefits
7. A new product, good, or service is developed through the partnership
8. Patent application filed or awarded as a result of partnership activity
9. Transition of a UNC technology, good or service to military partner

Positive Employee Experience

Employee experiences are measured using the biennial Systemwide employee engagement survey, which measures workplace satisfaction. The System will track key measures from the survey including job satisfaction, compensation and benefits, and

professional development. These key measures will be benchmarked nationally against four-year, public universities.

Voluntary Turnover

Voluntary turnover includes employees that chose to leave their institution. This metric includes employees that moved from one UNC System institution to another. This does not include involuntary turnover (management decision to end employment such as discharge, discontinuation of appointment, and reduction in force) or other turnover (retirement, death, or inability to return to work for medical reasons). Annual turnover is calculated by fiscal year. For example, 2021 voluntary turnover data includes faculty and staff that left between July 1, 2020 through June 30, 2021. Voluntary turnover for key subgroups disaggregates the voluntary turnover number by minority status and gender.

Appendix A: List of Underserved Counties

County	Underserved Indicator	County	Underserved Indicator	County	Underserved Indicator
Alamance	1	Greene	1	Rockingham	1
Alexander	1	Guilford	0	Rowan	1
Alleghany	0	Halifax	1	Rutherford	1
Anson	1	Harnett	1	Sampson	1
Ashe	1	Haywood	1	Scotland	1
Avery	0	Henderson	1	Stanly	1
Beaufort	1	Hertford	0	Stokes	1
Bertie	1	Hoke	1	Surry	1
Bladen	1	Hyde	1	Swain	1
Brunswick	1	Iredell	0	Transylvania	1
Buncombe	1	Jackson	1	Tyrrell	1
Burke	1	Johnston	1	Union	0
Cabarrus	1	Jones	1	Vance	1
Caldwell	1	Lee	1	Wake	0
Camden	0	Lenoir	1	Warren	1
Carteret	0	Lincoln	0	Washington	1
Caswell	1	Macon	1	Watauga	0
Catawba	1	Madison	1	Wayne	1
Chatham	0	Martin	1	Wilkes	1
Cherokee	1	McDowell	1	Wilson	1
Chowan	1	Mecklenburg	0	Yadkin	1
Clay	1	Mitchell	1	Yancey	1
Cleveland	1	Montgomery	1		
Columbus	1	Moore	0		
Craven	1	Nash	1		
Cumberland	1	New Hanover	0		
Currituck	1	Northampton	1		
Dare	0	Onslow	1		
Davidson	1	Orange	0		
Davie	0	Pamlico	1		
Duplin	1	Pasquotank	1		
Durham	1	Pender	1		
Edgecombe	1	Perquimans	1		
Forsyth	0	Person	1		
Franklin	1	Pitt	0		
Gaston	1	Polk	1		
Gates	1	Randolph	1		
Graham	1	Richmond	1		
Granville	1	Robeson	1		

Appendix B: Change Log for System Strategic Plan Goals

After the Board of Governors approved the Strategic Plan in May 2022, there were several changes in the goals due to data enhancements and updates which are documented below.

Underserved County Enrollments

Original: Baseline: 69,034 Target: 73,000 Stretch: 75,000	New: Baseline: 73,420 Target: 78,000 Stretch: 80,000
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Rationale:

As noted in the May board approved plan, we have updated the list of underserved counties to reflect college going rates for the North Carolina High School Class of 2020. The list of counties changed from 75 to 80 with the updated data. We also added high school enrollments from these counties to the baseline. The new goals mirror the logic of the original in that they aim to outpace population growth in 18-44 year olds from the designated counties.

Undergraduate Degree Efficiency

Original: Baseline: 24.9 Target: 25.8 Stretch: 26.8	New: Baseline: 24.7 Target: 25.3 Stretch: 26.2
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Rationale:

The Presidential Assessment Committee (PAC) approved a number of enhancements in the measurement of the Undergraduate Degree Efficiency metric. The new baseline and goals take into account those changes and applies the same logic used to determine the original goals by extending the growth trajectory of the PAC goals but using 2021 as baseline.

Graduate Degree Efficiency

Master's

Original: Baseline: 56.2 (3-yr average) Target: 60.0 Stretch: 61.0	New: Baseline: 54.6 (3-yr average) Target: 57.8 Stretch: 59.5
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Doctoral

Original: Baseline: 27.3 (3-yr average) Target: 29.0 Stretch: 30.0	New: Baseline: 26.8 (3-yr average) Target: 28.4 Stretch: 29.2
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Rationale:

In keeping with the approved PAC changes for UGDE, the methodology for calculating GDE also changed. The above new baselines reflect these measurement changes, and the goals mirror the logic from the original (1% yearly increase for Target and 1.5% yearly increase for Stretch).

Debt

First-Time Original Baseline: \$12,788 New Baseline: \$12,785	Transfer Original Baseline: \$11,377 New Baseline: \$11,402
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Rationale:

The PAC also approved updates to the debt metrics. As a result, the baselines changed slightly but the goals, which are cast as a percent change net inflation, will remain the same.

Health Sciences and STEM Credentials

Original: Baseline: 26,957 Target: 33,000 Stretch: 38,000	New: Baseline: 26,451 Target: 33,000 Stretch: 38,000
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Rationale:

The original baseline included all credentials, including shorter credentials that have been traditionally removed from IPEDS reporting. While IPEDS now includes these short certificates in their reporting, we have opted to continue our traditional definition of credential, which excludes short-term certificate programs. The goals remain the same.

Graduates Working in K12 Schools

Original: Baseline: 4,643 (3-yr average) Threshold: 4,800 Stretch: 5,000	New: Baseline: 4,618 (3-yr average) Threshold: 4,800 Stretch: 5,000
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Rationale:

These data are sourced from EPIC who provided updated data after revising their process for creating this metric. The adjustments were minor, and the goals will remain the same.

Research Productivity

Original: Baseline: \$1.75B Threshold: \$2.0B Stretch: \$2.1B	New: Baseline: \$1.81B Threshold: \$2.1B Stretch: \$2.2B
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Rationale:

With the implementation of a new reporting system and the integration of Covid relief funding, research reporting was in flux between the time data was supplied for the strategic plan in December and the time the President's Report on Research and Sponsored Programs was published in May. The updated baseline reflects what was published in the final report. The new goals apply the same growth percentages as were applied in the original goals.