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KPI'S FOR YOUR KPI'S

Performance driven KPI administration

Success factors in managing your KPI's

- Keep on top of MAESD and Forum Research changes
  - Preventative measures to save time and errors
- Understand your prior errors and other common errors
  - Avoid errors to reduce audit time and uploading problems
- Optimal staffing and oversight of KPI data
  - Best use to staff talent to drive, data input and manage the KPI process

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Keeping current on the KPI rules

- Mandatory posting of KPI published reports
  - All pcc's have been required to post its most recent KPI results as well as KPI results on its public website. If there is no website then the results must be posted on its promotional materials.
  - Auditors required to attest that they have seen the required postings
  - Forum Research announced at the end of May and was not included in the MAESD 2016 KPI Collection Cycle guideline-"Applies ONLY if you were a PCC included in the 2013 PCC KPI reporting, your auditor will be required to confirm that your institution-specific 2013 results are posted on your public website"

Keeping current on the KPI rules

- Allow for adequate lead time to make the necessary changes to your website well before the KPI audits start
- Ensure that link to the results are accessible in all media formats – Desktop, Tablet and Mobile
- No guidance from the MASED as to where the KPI results should be posted on your website. Should consider how your results can be positively marketed

Keeping current on the KPI rules

- Perhaps PCC's can provide some commentary on their results to allow students to better assess and understand the results

- Will need to update the website on an annual basis to either update the link or update the attached PDF file

- At this time only the 2013 KPI results are on MASED's website. Currently the 2014 results are available on Forum Research's portal – www.pcckpi.ca – You must login on your portal and download the results.   This should be printed to PDF format and posted to your website.

- The 2015 KPI results are expected to be posted in late summer 2017.

Keeping current on the KPI rules

- Defined audit upload periods for all PCC's
  - The KPI audit now must be conducted between May 15 to September 1, 2017 and within the same periods for future reporting cycles. Ensure your auditor is aware of this change.
  - KPI data files can only be revised during the defined audit period.
  - This lockdown may impact error corrections that may need to be made prior to the audit.

Keeping current on the KPI rules

- First time reporters
  - Newly registered PCC's are required to conduct a KPI audit in the 2016 reporting only if they registered in the Winter 2016 term (January 1, 2016 to April 30, 2016)
  - New PCC registrations after the winter 2016 term must still upload enrolment and graduate files during 2016 however the 2016 data files would be subject to audit in the 2017 reporting cycle with the 2017 data files.

Understand the KPI errors

- Have your KPI team review the KPI error report for the summary of corrections that were encountered by your auditor in the 2015 reporting cycle.

- Clear your systematic errors before the auditor starts the KPI audit engagement.

Understand the KPI errors

□ Review – KPI Processing and Transmission Problems – A critical review of the 2015 Reporting cycle.

□ See TRL website : www.tarole.ca/news (December 8th, 2016 CCO KPI Workshop PowerPoint)

□ Provides listing of common human errors on inputting data as well as various uploading errors encountered

KPI errors—student transfer case study

- A common problem with KPI's is where you have a student enrol in one course then transfers to a new course in a different KPI reporting cycle.

- Example 1- "After lock down" - A student that enrols in program A December 15, 2015 in one program then in January 15, 2016 transfers to Program B.

  - In this situation, the enrolment data file will show that student has enrolled in program A then when uploading the Fall 2016 graduate data file will not match with the enrolment file

KPI errors—student transfer case study

□ To resolve, the fall 2015 enrolment file must be corrected to indicate that the student transferred. See guidelines below on how to administer the change:

Changes to Submitted Data After an Audit Report Has Been Submitted

Adjustments to the enrolment and graduate data files will not be accepted after the enrolment and graduate audit report is submitted by the auditor, except under extraordinary circumstances and only with explicit authorization from the Superintendent. Any proposed adjustments requested after the audit is submitted must be authorized by the PCC's key executive – President, Chief Executive Officer, owner, Director or Officer. Furthermore, a revised audit report must accompany the revised data file(s) in order for it to be accepted.

KPI errors—student transfer case study

- The 2015 KPI data files that were impacted will then need to be re-audited and re-uploaded to Forum Research

- What if the original program and the new program were only 4 weeks in duration.   The transfer could cause the new student to exceed the graduate allowed period of 200% (ie 8 weeks from Dec 15, 2015 or February 9, 2016)

KPI errors – student transfer case study

- In this case the new start date of January 15, 2016 with an anticipate graduation date of February 12, 2016 (8 weeks) would cause this student to exceed the graduation allowed period.

- Best practice for PCC's is to disallow a transfer that would impact negatively on the graduation rate. Establish cut-off dates for transfers that are both beneficial to the student and the PCC

- Best practice to also have a standardized transfer document to provide evidence of the date of transfer and the new program

KPI errors – student transfer case study

- Example 2 "before lock down"- A student that enrols in program A December 15, 2016 in one program then in January 15, 2017 transfers to Program B.

  - In this situation assuming the 2016 KPI audit has NOT been completed, the Fall 2016 enrolment file can be re-uploaded to Forum and the transfer status can be updated to "Y" and the name of program transferred from would have to be indicated.

KPI errors – student transfer case study

- Best practice is to ensure that you have properly reflected all transfers into the prior period enrolment files where applicable before the audit

- This also aids in ensuring there are no program mismatches when uploading graduate data files to Forum Research

Optimal staffing & oversight of KPIs

- Key personnel should be responsible for the leadership, oversight and execution of KPI's
  - Assumption on total enrolments/graduates > 100
  - **Leadership** of the KPI should come from the CFO or owner/ manager to drive the timing and proper staffing of those involved with KPI's.   Should have general knowledge of KPI deadlines and requirements. The leadership role should also drive withdrawal and transfer standards to uphold the quality of the institution as well as optimize KPI results.

Optimal staffing & oversight of KPIs

- The **oversight** role should be a staff who knows the student body well and is aware of new enrolees, transfers and expected graduates.
- This individual typically should be the student administrator
- Leadership position should drive the oversight position to more attention to details with respect to the organization, accuracy of the hard copy student files
- Oversight should alert the leader of negative trends with the student population that would impact KPI results

Optimal staffing & oversight of KPIs

- The KPI inputting **execution** role should taken on by an individual that has aptitude for a high level of detail and accuracy. An administrative assistant or bookkeeper would likely have these attributes.

- Oversight should on a spot basis internally audit the data files for accuracy and completeness.

- The KPI inputter should provide feedback to the student administrator where student data files show inconsistencies or missing information

Disclaimer

□ Not all the materials contained in these materials are authoritative. The materials presented are base on our interpretation of the Private Career College Key Performance Indicator Guidelines – Enrolment and Graduate Reporting - 2016 Collection Cycle dated April 2017. They are intended to promote discussion and to provide insight to management with respect to management and administration of KPIs within their PCC's.