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ABSTRACT

The University of Miami (UM) in Florida established and continues to use a monthly Key Success Index (KSI) report for ongoing self-evaluation. At UM the KSI is a five-page document focusing on the current year-to-date amount for each key success indicator and how it differs from the previous year's amount. It includes monthly data for the current and previous year and where applicable the current budget for each indicator. Nineteen offices in the university provide 142 indicators for the report which is prepared during the third week of the month, circulated to members of the president's agenda committee, and of which highlights are discussed at the KSI meeting. Steps to set up a similar program at other institutions might include (1) identifying an advocate; (2) selecting indices; (3) identifying information sources; (4) determining the format; (5) setting up a spreadsheet to produce the report; (6) developing an information-collection process; (7) presenting the report; and (8) modifying the report over time. Potential obstacles include lack of interest among senior administrators, lack of information from the previous year, and data sensitivity. The KSI process provides early warning of developing problems, and yields subtle benefits related to education, team building, accountability, and visibility. (Contains 13 references.) (JB)

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SETTING UP A KEY SUCCESS INDEX REPORT: A HOW-TO MANUAL

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This paper was presented at the Thirty-Third Annual Forum of the Association for Institutional Research held at the Chicago Marriott Downtown, Chicago, Illinois, May 16-19, 1993. This paper was reviewed by the AIR Forum Publications Committee and was judged to be of high quality and of interest to others concerned with the research of higher education. It has therefore been selected to be included in the ERIC Collection of Forum Papers.

Jean Endo
Chair and Editor
Forum Publications
Editorial Advisory Committee

SETTING UP A KEY SUCCESS INDEX REPORT: A HOW-TO MANUAL

ABSTRACT

A Key Success Index report presented to key administrators and covering a wide range of critical areas provides a "monthly checkup" that allows an institution to monitor its health. This paper will briefly describe the use of such a report at one institution and will provide suggestions, based on the author's experience, for institutional researchers who wish to set up such a report at their own institutions. Eight steps will be explained. Obstacles that may be encountered, answers to frequently asked questions, and benefits to the institution and to the institutional research office also will be discussed.

INTRODUCTION

When higher education experiences hard times, colleges and universities need a way to monitor potential problems. A Key Success Index (KSI) report, updated on a monthly basis with information about high-priority operations of an institution, helps senior administrators track the "health" of a university or college throughout the year in order to identify at an early stage any unexpected variation from the prior year or from the budget. A KSI report, prepared under the auspices of the office of planning and institutional research, has been used at the University of Miami (UM) for five years. This paper will describe suggestions for implementation and administration of such a report by an office interested in setting up the report.

The concept of "key success indicators" is similar to "critical success factors," which J. F. Rockart defined as "the limited number of areas in which results, if they are satisfactory, will ensure successful competitive performance for the organization. They are the few key areas where 'things must go right' for the business to flourish. . . . As a result, the critical success factors are areas of activity that should receive constant and careful attention from management" (1979, p. 85).

Although the CSF method arose in the business arena, Peat Marwick in 1988 developed a model for higher education. The Peat Marwick model, which listed 67 critical success factors measured on a yearly basis, was designed for use by senior administrators and responded to the need to "compress information so that managers can focus their attention on high priorities in making and assessing decisions." Because of the differences between their measurements and traditional CSFs (e.g., monthly updates, more indices, use of numeric institutional data), administrators at UM decided to coin another term for their measurements: Key Success Indices (KSIs).

The KSI report has evolved into a document that is five pages long and focuses on the current year-to-date amount for each KSI and how it differs from the previous year's amount. The report also includes the monthly data for the current and the previous year and, where applicable, the current budget for each KSI. One hundred forty-two indices are obtained from 19 offices throughout the university. The report is prepared during the third week of the month and is circulated to members of the president's agenda committee a few days prior to the KSI meeting, where highlights of the report are discussed, including any major change from the previous year or from the budget.

This paper outlines eight steps needed to set up and to administer a KSI report. The approach used at the University of Miami is described, but alternative approaches also are suggested.

STEPS IN SETTING UP THE PROGRAM

Step 1--Identifying an advocate. Because the report uses data gathered from the entire university, the first step is to identify someone at a senior level within the institution who has an interest in the report and who is willing to persuade his/her colleagues to support the collection of data for the report. At UM the impetus for the KSI report came from the senior vice president with responsibility for business and finance. In late 1987, he approached the office of planning and institutional research about developing a monthly report encompassing a broad range of performance indicators. His objective was to provide a mechanism to bring senior management together in order to focus on changing trends in the quantitative factors driving the university's future well-being. He had used a monthly report to monitor revenue and expenditure trends in an earlier job in private industry and thought a similar type of report would be useful to help identify changes in key areas of the university at an early stage. He also hoped that a report dealing with the broad range of university departments would help educate senior administrators about what was happening outside their own area of responsibility and would promote a team approach to management. The senior vice president's enthusiasm, commitment, and support were paramount in selling senior administrators (some of whom were not initially very enthusiastic) on the importance of the report. Also, when needed, he was effective in increasing cooperation from offices supplying the data. Finally, his perspective was important in designing the report.

Step 2--Selecting the indices to use in the report. In order to determine which indices to use, the director of planning and institutional research at UM informally interviewed several university officials and then combined their suggestions into an overall list. A special effort was made to include any areas that in the past had produced an unexpected negative impact on the budget. Subsequent discussions with contacts in key offices often led to changes and additional measurements.

At the present time 142 indices are obtained from 19 offices throughout the university (Table 1). The report focuses on simple, real measures such as numbers of incoming students, cash position, receivables, payables, spending on research, and continuing-education revenue. One important section that becomes most relevant during the last several months of the fiscal year but is sometimes updated at earlier times as well, is the year-end forecasts. A set of measures an institution may wish to include in their KSI report (although it is not used at UM) is a calendar of deadlines for events that are critical to the operation of the reporting offices. If a calendar is used, each report could include the deadlines for the preceding month and whether they were met or not.

Although UM's list of KSIs has worked well for its purposes, it is important for each institution to select a set of measurements appropriate for its own use. The KSIs used in the report should be appropriate and accurate, and should measure high priority (key) operations of the institution. The following approach, more systematic than the one used at UM, may be useful for determining relevant KSIs. First, use an organizational chart to get an overview of all the functions or operations in the institution. Next, contact senior administrators with responsibilities for these areas and ask them four questions: Which functions reporting to them are the highest priority and the most critical to the success of the institution? Which types of measurement (e.g., volume, accuracy, efficiency, timeliness, customer satisfaction) are most important for measuring how well each of these functions is performing? Are there any measurements that in the past have produced some "surprises" at the end of the year and therefore should be included? Whom would they recommend as a contact person to supply the data? Once identified, the contacts also should be asked several questions: What type of measurement is most important for evaluating their operations? What specific data should be used to measure the performance of their offices? Are such data available on a monthly basis? Notice the **availability** of data is determined only after deciding which data are most **important**.

Step 3--Identifying contacts in offices supplying the information. Several characteristics are important for KSI contacts. First of all, they must be able to supply the data needed for the report. Sometimes the office in charge of a given operation may not be the best source of official data dealing with that operation (e.g., although the sponsored research office at UM has been the source of the number and the amounts of grant proposals and awards received, the budget office has been the contact for the official numbers for sponsored-research expenditures).

Two other important characteristics are a cooperative attitude and a track record for meeting deadlines. The KSI report means extra work for the contact person when the report is first created plus each month thereafter. When the report is first set up, the desired data may not be readily available and therefore may need to be reconstructed for the current as well as for the prior year. Furthermore, changes in the reporting format may occur in the future, requiring even more work. If an office is habitually late each month, consider asking if someone else in the office "who is less busy" can supply the data in a more timely manner. Sometimes a KSI contact will be reluctant to share data, even with senior university officials. In this case, invoking the assistance (or even the name) of the advocate identified in Step 1 or a senior administrator contacted in Step 2 can increase the willingness to supply the data.

Two final characteristics are a thorough knowledge of the data collection and report preparation process, and sensitivity to nuances in the data. Often, changes that show up in the KSI report are merely the result of variations from one year to the next in how data are collected or reported. Since the contacts will be asked to explain differences, it is important that they understand the data-reporting process well enough to be able to distinguish **real changes** in data from **apparent** differences merely resulting from variations in the reporting process (e.g., variations in the timing, grouping, or rules for calculating the data).

Step 4--Determining the format for the report. Table 2 shows the layout of the report used at the University of Miami. The first set of numbers shows current **year-to-date** figures and the changes (absolute and percentage) from the previous year. The second set shows current **monthly** data and the changes from the previous year. Actual prior year amounts and budgets (total budget plus a pro-rated year-to-date budget) also appear on the report. The KSI presentation at UM concentrates on the year-to-date numbers, and in particular on the percentage changes from the previous year. Because the UM report contains many numbers, other institutions developing the report may prefer to simplify the report format by including only the current year-to-date numbers, the actual and the percentage changes from the previous year, and the year-to-date budget numbers. If omitted on the formal report, the monthly, prior year, and/or total budget data could still be available to the presenter in case a question arises about any of these numbers during the presentation.

Step 5--Setting up a spreadsheet to produce the report. At UM the KSI report is prepared using a computer spreadsheet divided into five sections: the formal report, the current year-to-date (YTD) data, the current monthly data, the prior year's YTD data, and the prior year's monthly data (the layout appears in Table 3). Each month, data are entered into the appropriate columns of the current YTD section of the spreadsheet. Current monthly figures are calculated by subtracting the previous month's YTD figures from the current month's YTD figures. At the end of each year, the prior YTD amounts are "rolled over" from the previous year's data (although some offices prefer to provide comparable prior-year data each month). Prior monthly figures are computed from prior YTD figures.

Most of the numbers in the report section are formula-driven. The current year-to-date and the current monthly figures in the report are extracted from other sections of the report. The total budget amounts are entered manually, where appropriate, and the estimated YTD budget amounts are calculated by prorating the total budget amount by the proportion of the prior year's year-end total that had been accumulated by the same month last year.*

Step 6--Developing an information-collection process. When the KSI report was first developed at UM, offices supplied data each month via memos, copies of existing reports, and telephone calls. Along the way, UM developed a pre-printed data collection form (Table 4) to help with the collection of data. Although some offices have continued using their own forms or memos, many now use this form. Data are collected by the 15th of the month via fax or interoffice mail. When necessary, staff members make follow-up telephone calls to remind KSI contacts to send in their data and more importantly to ask about any unexpectedly large changes in the data.

Using the same data-collection form for each office is strongly recommended because all the data from the different offices will then appear in the same format. Furthermore,

*To expedite the development of a KSI report, a Lotus 1-2-3 spreadsheet containing formulas and sample data plus an accompanying manual can be obtained from the Office of Planning and Institutional Research at the University of Miami. Call 305-284-3856 for more information.

the form provides the contact office with a history of numbers so if a different person from that office submits the data, they can refer to previous data to be sure the data they are supplying are comparable and consistent with earlier data. In addition, any major discrepancies between new data and prior month's data can be easily spotted by the contact office before the new data are sent.

Step 7--Presenting the report. The KSI report is circulated to the participants of UM's agenda committee (Table 5) a few days prior to the KSI meeting, and only highlights of the report (i.e., large deviations in current data from the prior year or budget) are discussed at the meeting. Graphs showing monthly trends in student accounts receivable, indirect cost recovery by campus, tuition remission, and average net cash position also are presented. Excluding questions and discussion, the presentation usually takes about 30 minutes. Questions during the presentation and the ensuing discussion sometimes lengthens the entire presentation to an hour.

Actual preparation for the presentation (including a final edit of the report before it is sent out) takes less than 30 minutes. First a highlighter is used to mark the following: 1) any percentages in the "% BETTER (WORSE)" column of the YTD section that represent large changes from the prior year (usually 5 points or more in either direction), 2) any KSIs for which the trend on the report is different from the trend on the prior month's report, 3) any KSIs which are especially timely. One reason the presentation itself goes quickly is that fewer than half of the KSIs are discussed at any given meeting. Early in the fiscal year, financially oriented KSIs are often skipped or mentioned only in passing;

similarly, early in the enrollment calendar, data for new students are considered too preliminary to be discussed.

If there is a major trend (especially in the negative direction), the reporting office is asked to provide any explanations or comments they wish to have passed on at the KSI meeting. The presentation itself requires merely "narrating" those KSIs that have been highlighted and providing any explanations from the reporting office that have been summarized on a separate numbered list and cross-referenced in the margin of the presenter's KSI report.

The KSI meeting has become an opportunity to present other topics related to areas covered in the KSI report such as summaries of data comparing UM with other independent universities, results of student surveys, trends in the numbers of employees, and other similar topics. Usually the director of planning and institutional research makes these presentations, but sometimes other participants will give a short presentation.

Over time, participants have become more involved with the report. Vice presidents with responsibility for the areas covered in the report now come to the KSI meeting prepared to comment or to offer explanations regarding their areas. The president also has started taking the initiative in noting changes in KSIs.

Step 8--Modifying the report. At UM the KSI report has changed over time. New KSIs have been added, and others have been reformatted (e.g., payroll information originally was reported by employee classification within source of funds; currently, payroll is reported by source of funds within employee classification, and the Medical School payroll data are reported separately). Other institutions developing a KSI report should be sensitive to the need to fine tune and to add (or to delete) KSIs. A formal evaluation after a year may be useful.

POTENTIAL OBSTACLES

A potential obstacle to development may be lack of interest from senior administration. This obstacle is the primary reason for finding an advocate who will help to spearhead the cause. A well-placed ally can ensure interest in the project and can assist with obtaining cooperation from offices less than eager to supply data for the report.

Another obstacle that may be encountered is lack of cooperation from contacts in offices supplying information. Some of the offices supplying the data are overworked and will not be happy about the prospect of collecting additional monthly data. Contacts should be chosen carefully and possibly replaced if problems arise. The assistance of a vice president can help increase cooperation.

A third possible obstacle is that the best data from the previous year, and even for the current year, may not exist in the format desired. If data from the previous year are either not comparable or are not on file, the reporting office should be asked to reconstruct the data in a format comparable to what is used in the current year. As a rule, the quality of data is more important than the availability of the data. If the "best" data are not available at all, even for the current year, another set of data could be used on a temporary basis until a complete set of the "best" data is computed, at which point the new set of data can be substituted in the report. If a year-to-date budget can be computed, the current data can be compared to the year-to-date budget, making the absence of prior-year data less important.

Finally, some data required for the report are of a sensitive nature, and those responsible may not want the data shared with others (or even written in a report). As a means to ensure confidentiality at UM, the report is hand-delivered a few days in advance to the people who will attend the meeting (never faxed or sent via interoffice mail), and the report and transmittal envelope are labeled "confidential." At the end of the meeting, copies of the report are collected and destroyed. Similar steps should be taken at other institutions to ensure confidentiality.

FREQUENTLY ASKED QUESTIONS

One question asked about the data-collection process at UM is why the office producing the report does not simply download the data or obtain the data directly from computer printouts, thereby bypassing the contact office. The decision to have the KSI data supplied each month by the office with responsibility for the function being measured not only saves time for the office responsible for producing the report but also gives the reporting office a sense of ownership, responsibility, and importance. It is easier, faster, and more accurate for the office with responsibility for the data to explain why a KSI has changed significantly from the preceding month if they have supplied the data themselves.

A second question about the KSI report is how much time is required to develop and to produce the report. Because the director of planning and institutional research at UM wanted the monthly preparation of the KSI report to take as little time as possible and wanted it to be the kind of task that could be delegated to a staff member, extra effort was spent up-front on designing a spreadsheet in such a way as to make the monthly report preparation fast and easy. At UM, development of the KSI report took place over a two- to three-month period. As a result, now that the process has been set up and is running, entering and checking the data and printing the report and graphs take a staff person only about four-five hours (spread over the third week of each month). Occasionally, additional time is required to follow through with the KSI contacts on any questions about the data. Only about 15-30 minutes are spent preparing for the presentation.

A third question is which office should prepare the report. The reporting office should have the support of the central administration, be viewed as objective, and have experience collecting data from a number of sources. In order to avoid embarrassment and loss of credibility, it is especially important that the reporting office have experience spotting "anomalies" in data that may be the result of errors in reporting rather than real differences. Institutional research offices can be ideal for this role.

BENEFITS

Although a KSI report is time-consuming to plan and to develop and requires monthly coordination of a large number of offices around the campus, it does have important benefits. As with other planning projects, the **process** relating to the KSI report has been more valuable than the **report** itself.

The official reason for producing a KSI report is to alert senior management to any key areas of the institution that are "out of control" and to raise questions about situations at an early stage before problems arise. Major changes in an index can prompt questions about what is happening and may lead to a change in policy (or at least in budget). For example, at UM the KSI report has shown at an early stage both negative and positive trends in undergraduate and graduate enrollments, sponsored research, revenue in the School of Continuing Studies, accounts receivable, payroll, and cash flow. In fact, in several cases, having to compute the data for the KSI report alerted the reporting office itself about a change. In the absence of a formal report, monthly trends can be lost in the need to perform daily operations.

In addition to accomplishing the official purpose for the report, the KSI project can yield more subtle benefits related to education, team building, accountability, and visibility. Some of these tacit benefits were in fact among the "unofficial goals" of the KSI report at UM. For example, the KSI report has proved to be a useful tool to help managers at UM think about the basics of the university in ways trustees and other executives think. It causes the senior officers who receive the report to focus on the same key information and helps to educate senior managers about other areas of the university outside their direct responsibility. This heightened understanding of other areas leads in turn to an increased sense of teamwork among the senior administrators. The senior vice president at UM describes the KSI report as a "point of departure, a vehicle for bright managers to understand information and ask questions." Those who attend the KSI meetings at UM have become more aware of what is happening in other areas and sometimes even comment on another area.

The KSI report also reminds the offices providing the data that they are accountable for the management of their operation. Often just knowing that someone is measuring a process will cause it to improve. Most offices at UM are pleased the senior administration wants to include their data in a monthly meeting with the president. Therefore, they not only provide the data, but are helpful in providing answers to any questions.

An incidental benefit to the office producing the report will be to increase its visibility, not only with the senior officers of the university, but also with other offices around campus. Furthermore, the office preparing the report will have a better understanding of and access to important overall university data than it did before, a condition that makes the office--and the university--more effective and more able to meet the challenges of the 1990s.

TABLE 1

KEY SUCCESS INDICES--TOPICS

Number of new freshmen and transfers who applied, were admitted, and verified
Housing applications for new freshmen, transfers, and continuing degree undergraduates
Financial aid offered and accepted for new freshmen, new transfers, and graduate students; total financial aid expenditures for the current year
Return rates for new freshmen and for degree undergraduates
Fall-to-spring ratio for undergraduate and graduate tuition
Number of business graduate students who applied, were admitted, and verified
Number of education graduate students who applied, were admitted, and verified
Number of law graduate students who applied, were admitted, and verified
Revenue for the School of Continuing Studies
Student accounts receivable amounts
Sponsored research number of proposals, amount and number of awards received, by individual campus and total
Indirect cost recovery by individual campus and total
Direct cost recovery by individual campus and total
Gifts by purpose and individual categories (current unrestricted, current restricted, plant, loan, endowment, annuities and trusts, trusts held outside) by campus and total
Professional Income Practice charges, receivables, collections, expenditures, and surplus/deficit
Public health receivables for 30 days, 60 days, 90 days, and total
Estimated cost of losses from medical malpractice, general liability, and other lawsuits being defended
Payroll by classification of employee, source of funds, and campus
Number of employees by campus and type (medical and non-medical)
Tuition remission costs
Accounts payable
Cash flow analysis

<u>Year End Forecasts</u>
Total financial aid expenditures
Continuing Studies end of year net total revenue
Projected indirect cost recovery for each campus and total university
Projected budget variance for current funds, general funds, designated funds, restricted funds, and total

TABLE 2

KEY SUCCESS INDEX--STRICTLY CONFIDENTIAL REPORT

KEY SUCCESS FACTORS	FY 93 YTD Amount	BETTER (WORSE) THAN PREV. YEAR Amount	%	DECEMBER 92 Amount	BETTER (WORSE) THAN PREV. YEAR Amount	%	PREV. YEAR AMOUNTS YTD	Same Month	Yr. End Total	CURRENT YEAR BUDGET Total	EST YTD
NUMBER OF DEGREE UNDERGRADUATES											
NAME OF CONTACT (01/22/93)											
New Freshmen									as of Oct		
Applied	4,000	100	3%	1,000	0	0%	3,900	1,000	6,000	5,900	3,835
Admitted	1,000	100	11%	500	0	0%	900	500	3,000	2,800	840
Verified	150	50	50%	120	40	50%	100	80	1,750	1,600	91
Transfers											
Applied	600	100	20%	300	0	0%	500	300	1,600	1,300	406
Admitted	60	20	50%	10	(15)	-60%	40	25	850	550	26
Verified	30	5	20%	10	0	0%	25	10	600	200	8
NUMBER OF HOUSING APPLICATIONS (Fall 92)											
NAME OF CONTACT (10/02/92)									as of Oct		
New Freshmen	NA	NA	NA	NA	NA	NA	NA	NA	1,450	NA	NA
Transfers	NA	NA	NA	NA	NA	NA	NA	NA	300	NA	NA
Continuing DUGs (incl. by deadline)	NA	NA	NA	NA	NA	NA	NA	NA	2,350	NA	NA
FINANCIAL AID											
NAME OF CONTACT											
New Freshmen									as of Oct		
number offered	3,560	(100)	-3%	10	0	0%	3,460	10	3,530	NA	NA
amount offered	$21,360	($2,126)	-11%	$60	($20)	-50%	$19,240	$40	$21,180	NA	NA
number of students verified	860	(100)	-13%	10	0	0%	760	10	830	NA	NA
amount for students verified	$5,100	($860)	-20%	$50	($10)	-25%	$4,240	$40	$4,950	$8,000	$6,853
New Transfers											
number offered	660	(100)	-18%	10	0	0%	560	10	630	NA	NA
amount offered	$1,980	($40)	-2%	$30	$10	25%	$1,940	$40	$1,890	NA	NA
number of students verified	260	(50)	-24%	10	0	0%	210	10	230	NA	NA
amount for students verified	$720	($260)	-57%	$20	($10)	-100%	$460	$10	$660	NA	NA
Total Aid Awarded	$23,340	($18,850)	-420%	$90	($70)	-350%	$4,490	$20	$23,070	$43,000	$8,369
									as of May		
Total Expenditures	$14,300	($1,000)	-8%	$100	$0	0%	$13,300	$100	$28,400	$29,500	$13,815
Graduate Stipends											
number paid	600	(10)	-2%	50	0	0%	590	50	680	NA	NA
amount paid	$3,800	($100)	-3%	$1,400	$0	0%	$3,700	$1,400	$4,500	NA	NA
INDIRECT COST RECOVERY											
NAME OF CONTACT											
Main Campus	$1,400	$100	8%	$200	($200)	-50%	$1,300	$400	$2,400	$2,500	$1,354
Branch Campus A	$10,000	$1,000	11%	$1,500	$0	0%	$9,000	$1,500	$18,000	$19,000	$9,500
Branch Campus B	$2,700	$100	4%	$400	$0	0%	$2,600	$400	$4,700	$4,700	$2,600
Branch Campus C	$160	$0	0%	$20	($10)	-33%	$160	$30	$330	$300	$145
Total	$14,260	$1,200	9%	$2,120	($210)	-9%	$13,060	$2,330	$25,430	$26,500	$13,600
Total Federal Indirect	$13,000	$1,000	8%	$2,000	$0	0%	$12,000	$2,000	$24,000	$23,500	$11,750
DIRECT COST											
NAME OF CONTACT											
Main Campus	$7,000	$1,000	17%	$1,000	$0	0%	$6,000	$1,000	$14,000	$15,000	$6,429
Branch Campus A	$39,000	$1,000	3%	$6,000	$0	0%	$38,000	$6,000	$65,000	$70,000	$40,923
Branch Campus B	$7,000	$1,000	17%	$1,000	$0	0%	$6,000	$1,000	$12,000	$13,000	$6,500
Branch Campus C	$500	$10	2%	$50	($100)	-67%	$490	$150	$870	$870	$490
Total	$53,500	$3,010	6%	$8,050	($100)	-1%	$50,490	$8,150	$91,870	$98,870	$54,342
Total Federal Direct	$37,000	$1,000	3%	$5,000	$0	0%	$36,000	$5,000	$66,000	$67,000	$36,545

TABLE 3

Layout of Key Success Indices Report

Formal Report	Current YTD	Current Monthly	Prior Yr's YTD	Prior Yr's Monthly
	J J A S O N D J F M A M	J J A S O N D J F M A M	J J A S O N D J F M A M	J J A S O N D J F M A M
page 1	page 6	page 11	page 16	page 21
page 2	page 7	page 12	page 17	page 22
page 3	page 8	page 13	page 18	page 23
page 4	page 9	page 14	page 19	page 24
page 5	page 10	page 15	page 20	page 25
Calculated from Curr YTD, Curr Monthly, Prior Yr's YTD, & Prior Yr's Monthly	Data Input	Calculated from Curr YTD (this month minus last month)	"Rolled over" from Curr YTD at end of each year	Calculated from Prev Yr's YTD (this month minus last month)

TABLE 4

KEY SUCCESS INDICES DATA REQUEST FORM
SANDRA RAFF, PAYROLL OPERATIONS (284-3664)

FY 1992-93	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER
Number of Monthly Employees						
Medical						
Non-Medical						
Number of Biweekly Employees						
Medical						
Non-Medical						

	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY
Number of Monthly Employees						
Medical						
Non-Medical						
Number of Biweekly Employees						
Medical						
Non-Medical						

FY 1991-92	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER
Number of Monthly Employees						
Medical						
Non-Medical						
Number of Biweekly Employees						
Medical						
Non-Medical						

	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY
Number of Monthly Employees						
Medical						
Non-Medical						
Number of Biweekly Employees						
Medical						
Non-Medical						

Return to: Kerry Foster, Programmer Analyst
Rm. 341, Ungar Bldg., 284-2945

TABLE 5

LIST OF PEOPLE ATTENDING KSI MEETING

- President
- Executive Vice President & Provost
- Senior Vice Presidents (Business & Finance and Medical Affairs)
- Vice Presidents (University Advancement, Government Relations, General Counsel, Treasurer, Information Resources, Student Affairs)
- Vice Provosts
- Assistant Vice Presidents (Business Services and Facilities Administration)
- Assistant Secretary of the University
- Director (Planning & Institutional Research)

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