

PROPOSED METRICS FOR NORMALIZATION OF DATA
ENABLING FUNCTIONS ONLY
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PACE Functions and sub-functions
Final Recommendation (5/22/06)
Pilot Campuses (NCSU / NCCU)

Core functions (To be reported at the major **function level)**

- Instruction includes expenditures for: **(NO METRIC – CORE OUT OF SCOPE)**
 - Preparation, delivery and evaluation of academic content to students (Regular Term, Distance Education, Summer School, Lifelong Education, and Distance Education)
 - Departmental research and public service that are not separately budgeted should be included in this classification.
 - Excludes expenditures for academic instruction when the primary assignment is administration - for example, academic deans. However, expenditures for department chairpersons and administrators for whom instruction is an important role are included.
- Research includes expenditures for: **(NO METRIC – CORE OUT OF SCOPE)**
 - Activities specifically organized to produce research, whether commissioned by an agency, external to the institution or separately budgeted by an organizational unit within the institution. Subject to these conditions, the category includes expenditures for individual and/or project research as well as that of institutes and research centers.
 - Internally supported research programs, if separately budgeted, might be included in this category under the circumstances described.
 - Expenditures for departmental research that are separately budgeted for research are included in this category
 - Does not include expenditures for departmental research that are not separately budgeted. Such expenditures are included in the instructional category.
- Public Service includes expenditures for: **(NO METRIC – CORE OUT OF SCOPE)**
 - Activities established primarily to provide non-instructional services beneficial to individuals and groups external to the institution.
 - Community service programs (excluding instructional activities)
 - Medical/Veterinary Affairs - patient/client care services
 - Cooperative extension services
 - Conferences, institutes, general advisory services, reference bureaus, radio and television, consulting, and similar non-instructional services to particular sectors of the community
 - Economic Development

Enabling functions (To be reported at the **sub-function level)**

- Academic administration and support (**METRIC: EXPENDITURES IN ENABLING FUNCTION PER 100 HEADCOUNT STUDENTS**) **Rationale:** *Resources in this enabling function are provided and consumed based primarily on the number of*

- students enrolled in the university. Metric uses the broadest measure of student participation that reflects full and part time students enrolled in regular term, summer session, distance education, and professional schools (medical, veterinary, etc.) and certificate programs. The metric compares the total expenditures in the enabling activity to the student headcount number. Data source: PACE data template and 2004-05 Integrated Postsecondary Education Data System (IPEDS) for student headcount.*
- Academic support, advising, mentoring
 - Library
 - Student computing – labs & assistance
 - Faculty Development/Enrichment
- Advancement activities (**METRIC: “COST TO RAISE A DOLLAR” MEASURED BY THE RATIO OF TOTAL DOLLARS EXPENDED IN THE ENABLING FUNCTION DIVIDED BY TOTAL DOLLARS GENERATED,)** **Rationale:** *Metric compares resources expended in the enabling function to total dollars generated.. Data source: PACE data template and Voluntary Support of Education (VSE) 2005 Survey (which includes cash, in-kind contributions, and present value of deferred gifts).*
- Fundraising/development/management/foundation relations
 - Alumni relations
- Auxiliary Services (**METRIC: EXPENDITURES IN ENABLING FUNCTION PER 100 HEADCOUNT OF INDEX; INDEX = SUM OF STUDENT HEADCOUNT AND EMPLOYEE HEADCOUNT**) **Rationale:** *Enabling function provides services to entire campus community – students, faculty and staff. Metric using total expenditures accommodates variable use of outsourced activities (e.g. dining) in the provision of the services. Data source: PACE data template and 2004-05 IPEDS for student headcount and Fall 2004 Personnel Data File for employee headcount.*
- Dining & Vending services
 - Student housing operations
 - Intercollegiate Athletics
 - Bookstore, textbook rental, & other retail operations
 - Parking and transportation services
 - Motor Fleet/Motor Pool operations
 - Printing, Copying, & Graphics Services
 - ID Cards/One Card/All campus card services
- Enrollment related activities (**METRIC: NUMBER OF FTE EMPLOYEES REPORTED IN THE ENABLING FUNCTION PER 100 HEADCOUNT STUDENTS.** **Rationale:** *Metric acknowledges that the enabling function provides services to all students, both full time and part time students. Data source: 2004-05 IPEDS for student headcount and reported FTE employees per the PACE data collection template.*
- Student admissions, recruitment and marketing
 - Student financial aid and administration including scholarships
 - Student registration, records, retention
- External activities (**METRIC: NUMBER OF FTE EMPLOYEES IN THE ENABLING FUNCTION PER 100 EMPLOYEE HEADCOUNT**) **Rationale:** *Metric measures resource allocation decision by the institution in response to externally generated requirements and to the breadth and depth of University involvement in activities outside of immediate campus community. Data source: Number of FTE employees reported in the enabling activity per the PACE data collection template and the Fall 2004 personnel Data File for employee headcount*
- Marketing, public/constituent relations, and media relations
 - Government/corporate relations

- Facilities management (**METRIC: TOTAL EXPENDITURES REPORTED IN ENABLING FUNCTION PER 10,000 GROSS SQUARE FEET**) **Rationale:** *Metric using total dollars expended in the enabling function to the gross square feet of the campus accommodates the variable usage of outsourcing for services. Use of this metric acknowledges that the technical requirements of the campus, as reflected in the respective missions related to the use of chemical and biological materials, the relative age of the campus facilities, and the acreage for which the university is responsible, are all very important in any analysis of comparative costs related to facilities. Data source: Total expenditures reported in PACE data collection template and the gross square footage reported by Higher Education Facilities Commission (HEFC).*

 - Facilities/infrastructure operations and maintenance-including housekeeping, grounds, mail/courier services, trades, etc.
 - Facilities/infrastructure planning, design and construction
 - Real estate management
 - Waste Management & disposal, including hazardous materials
 - Campus safety (police) and risk management (Environmental Health and Safety)
 - Utilities direct costs and management
- Fiscal activities (**METRIC: TOTAL EXPENDITURES IN ENABLING ACTIVITY PER 100 HEADCOUNT OF INDEX; INDEX = SUM OF STUDENT HEADCOUNT AND EMPLOYEE HEADCOUNT**); **Rationale:** *Metric that measures the expenditures in enabling function to the total headcount population being served by the enabling function is indicative of complexity and magnitude of services required. Data source: Expenditures for enabling function is PACE data template; 2004-05 IPEDS for student headcount; and Fall 2004 Personnel Data file for employee headcount.*

 - Budget management including cash management and capital improvement
 - Accounting
 - Cashiering/receivables
 - Endowment & Foundation fiscal management/oversight
 - Payroll
 - Materials management/procurement/purchasing
 - Inventory control
 - Treasury services including investment & financing/debt management
- Human Resources (**METRIC: RATIO OF NUMBER OF W2 FORMS ISSUED TO FTE EMPLOYEES REPORTED IN THE ENABLING ACTIVITY**) **Rationale:** *Metric is based on the broadest measure of employee activity (number of W2 forms issued) that consumes services provided by enabling activity. Data source: W2 data for fiscal 2004-05 reported by UNC campuses (survey date July 2006) and FTE employees reported in the PACE data collection template.*

 - Job classification, recruitment, hiring, compensation, & benefits
 - Staff training/development and employee relations
 - Personnel records
- Information Technology (**METRIC: EXPENDITURES PER 100 HEADCOUNT OF INDEX; INDEX = SUM OF STUDENT HEADCOUNT AND EMPLOYEE HEADCOUNT**) **Rationale:** *Metric measures expenditures per 100 of total population consuming services. The various sizes, missions, and discipline complexity of the UNC campuses result in extremely diverse IT requirements and services to be provided to the respective campus communities. Data source: 2004-05 IPEDS for student headcount and Fall 2004 Personnel Data File for employee headcount.*

 - Academic/administrative applications including web management activities

- Database & systems management
 - Client support including training & applications support
 - Network infrastructure and support
 - Security measures, compliance, and support
 - Telecommunications
 - Audiovisual support
- **Accountability activities (METRIC: NUMBER OF FTE EMPLOYEES REPORTED IN THE ENABLING ACTIVITY PER 100 EMPLOYEE HEADCOUNT) *Rationale: Metric measures resource allocation decision by the institution in response to externally generated requirements. Data source: PACE data collection template for FTE employees reported in enabling activity and 2004 PDF for employee headcount.***
- Legal and policy development and compliance
 - Institutional research, planning and analysis including accreditation and assessment activities
 - External compliance & other reporting such as UNC-GA, State of North Carolina, federal government, legislative entities
 - Disaster Recovery/Business continuity/Organizational Resiliency
 - Equal Opportunity, diversity, & disability services
 - Auditing – Internal & External
- **Sponsored Project activities (METRIC: TOTAL EXPENDITURES REPORTED IN RESEARCH AND PUBLIC SERVICE PER FTE EMPLOYEES REPORTED IN ENABLING ACTIVITY) *Rationale: The preponderance of sponsored program activity encompasses both research and public service core missions. Metric measures the value of the total expenditures that are administratively supported by the enabling activity. Data source: PACE data collection template - Total expenditures reported for Research and Public Service, respectively, and total FTE employees reported in enabling activity.***
- Research and project pre-award
 - Research and project post-award, including fiscal administration
 - Development, transfer, and commercialization of patents/trademarks
- **Student service activities (METRIC: NUMBER OF FTE EMPLOYEES REPORTED IN ENABLING FUNCTION PER 100 HEADCOUNT STUDENTS) *Rationale: Metric measures number of employees providing services to population consuming the services. Data source: PACE data collection template and 2004 IPEDS for student headcount.***
- Student programs and activities, student conduct, career planning and placement, mentoring, student government & organizations
 - Student health/counseling
 - Recreation & Intramural services