



**MnSCU Office of Internal Auditing**  
**Customized Training Network Semi-Annual Performance Report Form**  
**Fiscal Year 1999**

PURPOSE: The following document was provided by the MnSCU System Office to all schools that were part of the Customized Training Network. It “provides a mechanism to report year-to-date performance at mid-year and to summarize total activities at the end of the year.”

## Customized Training Network Semi-Annual Performance Report Form

### Instructions for Completion

This document provides a mechanism to report year-to-date performance at mid-year and to summarize total activities at the end of the year.

### **The following process changes are in place for FY99:**

- |  |  |
|--|--|
| Reporting Dates                              | <ul style="list-style-type: none"><li>▪ The Performance Report and Institutional Activity Summary will be submitted twice a year, on or before 1/31 and 8/15, instead of quarterly, as in FY98. These dates reflect the reporting period relating to the fiscal year. The report due on 1/31 reflects activity from 7/1 to 12/31. <b>The 8/15 report reflects the annual cumulative total from 7/1 to 6/30.</b></li><li>▪ Funding distribution decisions will be made by 9/1, with funds distributed by 9/15, instead of 8/15 and 9/1 as in FY98.</li><li>▪ Performance funds will be distributed only to those institutions reporting by the 8/15 deadline date.</li><li>▪ An institution may use cash, accrual, or its own hybrid accounting method when including financial data, as long as the method is consistently followed.</li></ul> |
| See System Office Approval Form in Section 4 | Establish the annual goals for your institution either per CT Network recommendation, or based on your institution decision with system office approval, and complete the column under “Institution Decision.”   |
| Calculation Note                             | <b>The calculations on this report for 1/31 and 8/15 do not require averaging. You only need to report the comprehensive cumulative totals for each section from the beginning of the fiscal year to the end of that reporting period.</b>   |
| Indicator #1                                 | Total the revenue identified on your Customized Training Network Institutional Activity Summary that was generated by contracted services with your Targeted Customer Group clients and divide that number by the total client revenue generated. This calculation will provide you with the percentage to report  |

- Indicator #2 Total the number of activities and projects completed for Targeted Customer Group clients that involve partnership with another institution or agency. Divide that number by the total number of activities/projects completed. This calculation results in the percentage to record.
- Indicator #3 Add the rating score from each participant satisfaction survey and divide that by the total number of participant satisfaction survey forms completed. This calculation results in the percentage to record.
- Indicator #4 Add the rating score from each client satisfaction survey and divide that by the total number of client satisfaction survey forms completed. This calculation will provide you with the percentage to record.
- Indicator #5 Add the total revenue generated from all contracted services. Divide that total by the dollar amount of your institution's CTN allocation. This will provide you with the ratio to report. Note: When you calculate your mid-year report, you must divide your allocation by 2 BEFORE completing the two steps above. This extra step is ONLY for the 1/31 report, and will result in an accurate year-to-date ratio.
- Indicator #6 You can use the revenue figure you identified in Performance Indicator #1 for the Targeted Customer Group client revenue. Divide that figure by the dollar amount of your institution's CTN allocation. This will provide you with the ratio to report.  
Note: When you calculate your mid-year report, you must divide your allocation by 2 BEFORE completing the two steps above. This extra step is ONLY for the 1/31 report, and will result in an accurate year-to-date ratio.

### Calculating Performance Points at Year End

Funds for activities completed during FY 99 will be distributed according to the number of performance points (out of 100 possible points) each institution earns.

To calculate performance points, follow these steps:

- 1) For each performance indicator, compare the institution's results (either a % or ratio) to the "Annual Goals-Institution Decision" column.

- 2) An institution can receive partial credit for its performance on an annual goal that wasn't fully met, using the following earning scale:

<b>% of Goal Achieved</b>	<b>% of Points Earned</b>
100% or more	100%
90-99.9%	90%
80-89.9%	75%
70-79.9%	60%
69.9% or less	0%

The table below demonstrates the points to be earned based on the percentage of each goal achieved:

<b>30</b>	<b>15</b>	<b>5</b>
100% = 30	100% = 15	100% = 5
90% = 27	90% = 13.5	90% = 4.5
75% = 22.5	75% = 11.25	75% = 3.75
60% = 18	60% = 9	60% = 3
Less = 0	Less = 0	Less = 0

- 3) An institution's point total after calculating the score for each indicator is the total performance score.

The FY99 allocation (which you are now receiving) was distributed using both base and performance criteria. Procedures were initiated to:

- set a ratio between the base and performance.
- set a baseline for earning the performance portion.
- set an incentive level for earning available additional performance dollars.

Distribution of the FY99 allocation (which will be based on this year's performance results) may follow the same procedures, or they may vary pending legislation and CT administrator input. The CTN administrator group has already agreed on the following additional procedural decision:

- Any institution that does not submit mid-year and annual performance reports will lose 15% of its total CTN allocation for FY00.

**CUSTOMIZED TRAINING NETWORK SEMI-ANNUAL PERFORMANCE REPORT FORM**

**Institution Name:** \_\_\_\_\_

**Fiscal Year:** \_\_\_\_\_

**Administrator Name:** \_\_\_\_\_

**Administrator Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

#	Indicator	Weight	Annual Goals		1/31 Report	8/15 Year End Total	Points
			Network Recommendation	Institution Decision	%	%	
1	<b>Targeted customer group client revenue as a percent of total client revenue</b>	<b>30</b> points	<b>70%</b>				
<i>Calculation:</i> $\frac{\text{Targeted customer group client revenue}}{\text{Total client revenue}}$ e.g., $\frac{\$175,000}{\$200,000} = .875 = 87.5\%$							
2	<b>Satisfactory evidence of partnership development</b>	<b>15</b> points	<b>10%</b>				
<i>Calculation:</i> $\frac{\text{Number of activities/projects involving partners}}{\text{Total number of activities/projects}}$ e.g., $\frac{2}{20} = .10 = 10\%$							
3	<b>Satisfactory performance on a participant satisfaction instrument</b>	<b>15</b> points	<b>75%</b>				
<i>Calculation:</i> $\frac{\text{Total sum of scores from each participant satisfaction survey completed}}{\text{Total number of surveys completed}}$							
4	<b>Satisfactory performance on a client satisfaction instrument</b>	<b>30</b> points	<b>75%</b>				
<i>Calculation:</i> $\frac{\text{Total sum of scores from each client satisfaction survey completed}}{\text{Total number of surveys completed}}$							
5	<b>Total client revenue to CTN allocation ratio</b>	<b>5</b> points	<b>1.5:1</b>				
<i>Calculation:</i> $\frac{\text{Total client revenue}}{\text{CTN allocation}}$ e.g., $\frac{\$250,000}{\$100,000} = 2.5:1$							
6	<b>Targeted customer group client revenue to CTN allocation ratio</b>	<b>5</b> points	<b>1:1</b>				
<i>Calculation:</i> $\frac{\text{Targeted customer group client revenue}}{\text{CTN allocation}}$ e.g., $\frac{\$175,000}{\$100,000} = 1.75:1$							
<b>Totals</b>		<b>100</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>		

## Customized Training Network Institutional Summary Report

### Instructions for Completion

- |                                  |   |
|----------------------------------|---|
| Institution/Program Information  | <ol style="list-style-type: none"><li>1. Record the institution's name and the fiscal year.</li><li>2. State the institution's current CTN allocation.</li><li>3. Identify the institution's CTN administrator and obtain his/her signature.</li><li>4. Obtain the signature of the Partnership Advisory Group Chair to provide assurance that a review of the Targeted Customer Group list has been completed.</li><li>5. List the institution's Targeted Customer Groups at the 2-digit level.</li><li>6. At the beginning of each fiscal year, submit the top sheet of this form to the System Office for a file copy of your Targeted Group list.</li></ol> |
| SIC, Targeted Customer Groups    | <ol style="list-style-type: none"><li>7. Record the cumulative number of non-duplicated clients served by each SIC for the current reporting period.</li><li>8. Indicate whether a client is from a Targeted Customer Group with a "T" or from an "other" customer group with an "O".</li><li>9. Record the cumulative number of activities/projects initiated for this reporting period.</li></ol>   |
| Partnerships, Contracts, Revenue | <ol style="list-style-type: none"><li>10. Indicate the number of projects involving a partner(s).</li><li>11. Calculate and record the cumulative revenue for each major group (2-digit SIC) for the reporting period.</li><li>12. Add and record subtotals per industry division in each "Subtotals" section.</li></ol>  |
| Cumulative Totals                | <ol style="list-style-type: none"><li>13. Total and record revenue from Targeted Customer Group clients.</li><li>14. Total and record revenue from other clients.</li><li>15. Calculate and record grand totals.</li><li>16. Use this information to complete the Customized Training Semi-Annual Performance Report Form.</li></ol>  |

Amendments

17. If significant expansion or decline in industries takes place at any time during the year, the list of Targeted Customer Groups can be amended, based on agreement from the PAG leadership. When adding or deleting Targeted Customer Groups, submit the top page of this form to the Systems Office for a file copy.

## FY99 CT Network Annual Goals Amendment Approval Form

I am submitting for approval the following goals for FY99. They reflect less than the CTN recommended minimum.

	Network Goal Recommendations	Institution Goal Decision
#1	70%	
#2	5%	
#3	75%	
#4	75%	
#5	1.5:1	
#6	1:1	

Please describe extenuating circumstances that require a reduction in the level of performance.

Administrator signature: \_\_\_\_\_  
Date

Institution: \_\_\_\_\_

Date: \_\_\_\_\_

Approved: \_\_\_\_\_  
Richard Tvedten, Date

18. System Director for Continuing Education/Customized Training



## CUSTOMIZED TRAINING NETWORK INSTITUTIONAL ACTIVITY SUMMARY

**Institution Name:** \_\_\_\_\_ **Fiscal Year:** \_\_\_\_\_

**CTN Allocation:** \$ \_\_\_\_\_ **Reporting Period: (please check one):** 1/31\_\_\_\_ 8/15\_\_\_\_

**Administrator Name:** \_\_\_\_\_

**Administrator Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Partnership Advisory Group Chair Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Please provide a list of your institution's targeted customer groups at the 2-digit level:**

SIC	Industry Name
1.	
2.	
3.	
4.	
5.	
6.	
7.	











SIC	Major Group Title	Clients				Activities/Projects				# Projects w/ Partners		Client Revenue			
		1/31		8/15		1/31		8/15		1/31	8/15	1/31	1/31	8/15	8/15
		T	O	T	O	T	O	T	O			T	O	T	O
96	Administration of Economic Programs														
97	National Security & International Affairs														
	Subtotal														
	Nonclassifiable														
99	Nonclassifiable establishments														
	Subtotal														
	Totals														
						<b>1/31</b>				<b>8/15</b>					
<b>Total Targeted Customer Groups Client Revenue</b>						\$				\$					
<b>Total Other Customer Groups</b>						\$				\$					
<b>Grand Total Client Revenue</b>						\$				\$					

## Additional FY99 Reporting Requirements for Continuing and Customized Training Activity

Thirty-one of the 36 MnSCU colleges and universities are participating during FY99 in the Customized Training Network (CTN). These institutions are required to submit data regarding their progress in meeting 6 performance indicators. CTN performance results provide the System Office with a means to calculate and distribute the CTN allocation. In addition, these performance results, when reported in an aggregate, provide critical information to key stakeholders.

Besides data collected for CTN performance reporting, stakeholders are also interested in additional information on the extent and type of services CE/CT provides to the public. To meet this stakeholder expectation, the following additional data will be reported by each college or university on a semi-annual basis:

- Number of students/participants in non-credit instruction offered through contracted (closed to the public) delivery.
- Number of students in non-credit instruction offered through public open enrollment delivery.
- Number of students in credit bearing courses offered through contracted (closed to the public) delivery.

For FY99 activity, these numbers may be reported as duplicated headcounts. ISRS design specifications will make it possible to report data at greater levels of specificity, including the following:

- Both duplicated and unduplicated headcounts (except in cases of contracts which involve employer non-disclosure of employee data)
- Both duplicated and unduplicated headcounts sorted by industry sector, through contracted delivery and open enrollment delivery (as applicable).
- Both duplicated and unduplicated headcounts, sorted by instructional/skill area, based on standard descriptors, in relation to priorities set by industry, the CTN, MnSCU, or the Legislature.

It is anticipated that data collection at the levels of specificity above will be possible in FY00 at a system level, i.e., available to both the institution and the system office, via ISRS.

In the meantime, despite the difficulty of keeping track of data using various management systems, it is critical that we have accurate data available. Future



Source: MnSCU System Office

funding decisions are certain to be made increasingly based on relevant data, including relevant MnSCU data.