Quantifying the Impact of Your Student Success Initiatives

Toolkit

The Evaluation Cycle

Overview

Background and Recommendations for Toolkit

Given the significant investment required to implement new or expand existing student success initiatives, it is critical that leadership teams consider how they will evaluate the impact of those strategies. Understanding impact helps make the case for additional or continued investment in resources, informs future decisions, and highlights the excellent work that you and your team do to support your students. This toolkit walks you through our recommended annual cycle for evaluating the impact of your student success initiatives. The toolkit guides you through prompts and examples for the four main steps in the process: 1) Define Scope and Metrics, 2) Design Evaluation Strategy, 3) Analyze and Report on Results, and 4) Iterate and Scale Impact.

Primary Audience: Leadership teams, including Program Sponsors and Owners

Timing for Completion: Prior to the start of each academic year

Cyclical Process for Analyzing Impact

1

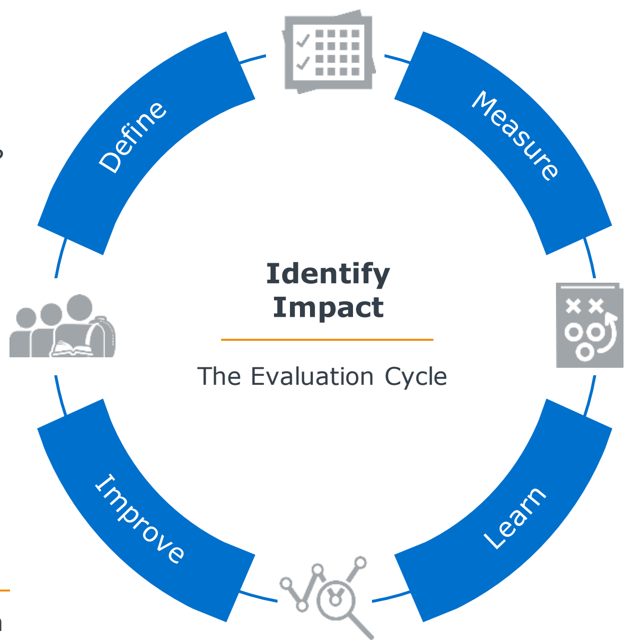
Define Scope and Metrics

What are you trying to achieve, what strategies will you deploy, and how will you measure success?

2

Design Evaluation Strategy

How will you know you are making progress and what is the source of that information?



3

Analyze and Report On Results

What types of analyses will you utilize and how will you report on those results?

4

Iterate and Scale Impact

How will the results inform next steps and future decision making?

Step 1: Define Scope and Metrics

What are you trying to achieve, what strategies will you deploy, and how will you measure success?

Strategic Goals - Identify *at least one* **institutional strategic goal** that led your institution to implement EAB's Student Success Management System (SSMS).

Examples include: increase retention/persistence rates, increase graduation rates, decrease summer melt, decrease time to degree, close achievement gaps, improve the student experience, or improve operating effectiveness.

Objectives - Identify *at least one* of your currently in-progress **objectives** for deploying your SSMS to achieve your institutional strategic goal(s) identified above.

Examples include: simplify student outreach, increase faculty engagement, create a coordinated care network, improve support in first year gateway courses, develop interventions for at-risk students, shift culture to data-driven behaviors, or simplify student onboarding.

Strategies - Identify *at least one* of your currently in-progress **strategies** for deploying your SSMS to achieve your objective(s) identified above.

Examples include: train advisors on student outreach best practices, include faculty in building success markers, use case management features, conduct re-enrollment campaigns, train academic leaders on dashboards, launch progress reports, or build targeted content in student mobile application.

Step 1: Define Scope and Metrics

What are you trying to achieve, which strategies will you deploy, and how will you measure success?

Metrics - Identify *at least two* **metrics** you will use to measure success against your strategies. The metrics should be SMART – Specific, Measurable, Actionable, Relevant, and Timely. Note the current baseline for each metric (if possible) and your aspirational goal.

Example Process and Outcome Metrics to Consider

General Appointment Activity
- Total appointments, appointments per student, percentage of students with appointments
- No-show or cancellation rate
- Attendance records
- Absence issues reported
- Summary reports filed

Appointment Campaigns
- Students contacted
- Number of scheduled and attended appointments
- Students who completed intended action

Case Management
- Progress Report response rate
- Alerts issued
- Open and closed cases

Student Adoption
- Mobile app adoption and utilization
- Completion of to-dos
- Appointments scheduled by students

Student Academics
- GPA
- Academic standing
- Credit Attempted, Earned, Completion %
- Major changes
- Average course grades
- Changes from midterm to final grades
- Course DFW rates
- Course repeats

Other
- Staff or student time savings
- Staff or student engagement/satisfaction
- Student LMS engagement

Enrollment and Graduation
- Term registration
- “Stop outs” re-enrolled
- Application yield
- Earlier registration
- Wait time during application and registration processes
- Applications to graduate
- Cleared holds, time to clear holds

Metric *How will you track progress on your strategies? Pick at least one process and one outcome metric.*	**Current Baseline** *Where do you currently stand with these metrics? If you do not have a baseline, write N/A.*	**Aspirational Goal** *How much would you like to improve from the baseline? If you do not have a baseline, still identify a goal.*
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Step 2: Design Evaluation Strategy

How will you know you are making progress and what is the source of that information?

Population - What **population** will you evaluate for your analysis? The decision should be entirely dependent on which staff or students you will be acting upon your through identified strategies.

Examples include: first year students, all faculty members sent progress report requests, specific student sub-populations, "Murky Middle" students, all professional advisors, support staff and students within a specific college, or the incoming student cohort.

Consider Piloting, But Be Mindful of Sample Size

We recommend piloting your strategies first with a subset of staff and/or students, to analyze impact on a smaller (and less costly) scale before deciding to expand to the entire population. But be mindful of sample size! Make sure your pilot population is large enough to draw meaningful conclusions before expanding more broadly. You can access a free, online sample size calculator from a variety of websites, including here - https://www.qualtrics.com/blog/calculating-sample-size/.

Subgroups to Analyze – Are there specific **student or staff subgroups** that you would like to slice the data by, in order to compare against each other or further isolate a specific student population?

Examples include: students with specific GPA ranges, faculty within a specific department, first generation students, or Pell Grant eligible students.

Understanding Institutional Context

Consider what other institutional initiatives or changes may impact the strength of your analysis. For example: Did you change the application requirements for your entering first time students? Have you rolled out other large initiatives in addition to the one you're measuring? Are you implementing more than one technology at once? We recommend tracking the impact of your other initiatives concurrently so you may possibly separate out effects from each when reporting on your specific results.

Step 2: Design Evaluation Strategy

How will you know you are making progress and what is the source of that information?

Options for Using Comparative Data to Gain Confidence in Your Results

More confident → *Less confident*

1 Compare to Similar Population Who Were Not Acted Upon (Control)

- By establishing a control population, you will be able to determine the differences in outcomes between those who received the strategies versus those who didn't.
- Ideal for tracking success against **outcome** metrics.
- *Example: After launching large scale appointment campaigns, half of students received the intervention and the other half did not respond. Compare the academic outcomes between those two groups of students to better isolate impacts of the intervention. However, be mindful of self-selection bias!*

2 Compare to Similar Historical Baseline Population (Trending)

- Use a similar historical population's outcomes to understand the improvements with your specific population, called a trending analysis.
- Ideal for tracking success against **outcome** and **process** metrics, when a baseline is available.
- *Example: Previous first year student cohorts with a GPA between 2.0 and 3.0 retained at a rate of 80%. After conducting interventions targeted to first year Murky Middle students, the current cohort with a GPA between 2.0 and 3.0 retained at 85%.*

3 No Comparison Available (Setting Baseline)

- You may not have a comparison population available, because the strategies were mandated to all, data was not historically collected, or the process change did not exist before. Start collecting data now and still track against a goal.
- Ideal for tracking success of **process** metrics over time.
- *Example: You previously did not have any early alert system or processes established, so have no baseline for faculty response rates. Track response rates starting this academic year to establish baseline for future analysis and compare against your stated goal.*

Step 2: Design Evaluation Strategy

How will you know you are making progress and what is the source of that information?

Comparative Data - What **comparison data** will you use to understand the context around improvements to your target population? Please select only one option from those listed on the previous page for each of your identified metrics.

Important Nuances to Keep in Mind

As with any analysis, it is important to understand the potential bias or flawed assumptions underlying its design that may impact your confidence in the results of your student success initiatives.

- **Selection and Self-Selection Bias:** *Selection bias* occurs when the selection of individuals for the analysis is not random; for example, a specific intervention is targeted only to students within the College of Nursing. *Self-selection bias* occurs in which individuals select themselves for the analysis; for example, if only high performing students download the Navigate mobile app. Both types of bias prevent your analysis from being representative of the entire population, and may be unavoidable. Be careful to design the analysis of your results in such a way that mitigates any potential impacts of selection bias, possibly by diving deeper into subgroups.
- **Correlation Versus Causation:** *Correlation* is a statistical measure that describes the relationship between two or more variables. *Causation* indicates that one event is the result of the occurrence of another event. It is difficult in most student success research to attribute causality to specific variables impacting students due to the volume of potential causes for any student behavior. While randomized controlled testing may not be feasible on your campus, we recommend gathering a greater variety of data and testing initiatives with different groups of students to try to isolate the effect of your initiative.

Step 2: Design Evaluation Strategy

How will you know you are making progress and what is the source of that information?

Data Sources Available in Navigate

General Appointment Activity
- Appointments Reports
- Activity Analytics Dashboard
- Student Services Reports

Appointment Campaigns
- Export Student List (available for each individual campaign)
- Intervention Effectiveness*

Case Management
- Alerts & Cases Reports
- Progress Reports Reports
- Student Information Reports

Student Academics
- Advanced Search
- Population Health Dashboard*
- Intervention Effectiveness*

** Only available for members with the Intelligence module*

Data Source- Identify the **source(s) for the data** you will need in order to track success against your metrics for your identified population.

Examples include: specific Navigate reports, dashboards, or watch lists, data provided by your Institutional Research office, data from a survey/focus group you conducted, or data from other systems.

Additional Variables – What specific **fields or attributes** should the datasets include, based on your subpopulations of interest?

Examples include: first generation status, classification, or staff office location.

Owner and Timing – When will the data need to be extracted and by **whom**?

Examples include: at the beginning and end of the term; by graduate assistants, or by advising directors

Step 3: Analyze and Report On Results

What types of analyses will you utilize and how will you report on those results?

Recommended Resources

Intervention Effectiveness*

New dashboards in the Navigate platform, to analyze changes in academic outcomes for different populations of students

- **TO ACCESS:** Once you have permission to view these dashboards, access the "Analytics" tab in Navigate and click "Intervention Effectiveness"
- Several tabs to allow exploration between populations and time periods
- Filter for your population by enrollment term, campaign, watch list, category or tag, degree, college, major, classification, or GPA range
- View changes in term enrollment, graduation, GPA, credits attempted, and credits earned across your determined timeframe

**Only available for members with the Intelligence module*

Student Success Initiative Financial Model

Excel tool provided by EDUCAUSE and rpk Group to help examine financial implications of initiatives

- **TO ACCESS:** Download the tool and watch training videos at this website - https://www.educause.edu/ipass-grant-challenge/return-on-investment-toolkit
- Evaluate expenditures and funding needed to support your initiative, the projected return on investment from improvements in student success, and impact of changes on academic efficiency
- Ideal for teams who can commit the resources to more complex financial analysis – *FOR ADVANCED PRACTITIONERS ONLY*

Survey/Focus Groups/Interviews

- Consider conducting surveys, focus groups, or interviews with staff and/or student populations pre- and post-initiative to obtain both quantitative and qualitative data
- Research questions can ascertain service or technology satisfaction, increases in knowledge, approximate time savings, or anecdotal feedback

Internal Resources

- Partner with your Institutional Research office to take advantage of internally available dashboards or data sets (including survey data)
- Your internal evaluation & assessment experts will be your greatest asset to planning how you will analyze the impact of your strategies!

Other Suggested Analyses

Appointments

- **Process metrics** – Improvements in appointment no-show rates over time, as well as increase in average in-person touchpoints per student per term as a result of time savings.
- **Outcome metrics** – Changes in credits attempted/earned for those with more touchpoints.

Progress Reports

- **Process metrics** – Changes in faculty response rates over time, as well as percentage of students with follow up interactions.
- **Outcome metrics** – Improvements from mid-term to final grade for students with submitted at-risk progress reports, compared to students who completed the course historically.

Holds

- **Process metrics** – Percent of students adopting mobile application and accessing the Hold Center.
- **Outcome metrics** – Compare average Hold resolution time between students using mobile app versus those not using mobile app.

Step 3: Analyze and Report On Results

What types of analyses will you utilize and how will you report on those results?

Quantitative and Qualitative Analysis - What tools will you use for both the **quantitative** (hard results) and **qualitative** (context) analysis of your strategies? See previous page for suggested tools and calculations.

Report On Results – List out at least one **stakeholder** who should learn about the impact of your strategies, being mindful of their passions, who is best prepared to share the information, and in which format/venue you should share the information.

People *Which stakeholders should learn about the impact of your strategies?*	**Passions** *What do your stakeholders care most about? What should be highlighted in the analysis?*	**Presenters** *Who is best prepared to share the information?*	**Presentation** *How should the information be provided to these stakeholders?*
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Step 4: Iterate and Scale Impact

How will the results inform next steps and future decision making?

Key Questions to Consider

- What have you learned from your initiative? Would small changes (e.g., the timing of your outreach) potentially yield even greater results?
- Can you achieve the same results with a larger group of students or staff, but with the same or a lower ratio of resources per student?
- Does the impact of the initiative outweigh any potential costs (e.g., staff time, resources, funding) of expanding further?
- And what should you consider if you don't see positive impact? How would you adjust your approach to ensure you're measuring impact in the right way? Or targeting the right population?

The Right People - Which **stakeholders** need to be involved in the decision to continue and/or expand the deployed strategies? Try to be as specific as possible.

Examples include: Program Owner, Directors of advising, Deans, VP of Student Success, Student Success Committee members, and/or Application Administrator.

Final Decisions – Who will make the **final recommendation** and who will be the **decision maker**?

Recommender:

Decider:

Where and When – Where will the decision be made and what approximate **timing**?

Examples include: Student Success Committee meeting and end of spring 2018 term.

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