



CONNECTED

Day One Keynote

The Emerging Discipline of **Student Success Management**



WELCOME



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“If you can't measure it,
you can't improve it.”

Peter Drucker

First-Year Retention

Tunnel Vision

How It Was Intended

- A way to track entering cohort performance year over year
- A means to benchmark fairly between schools



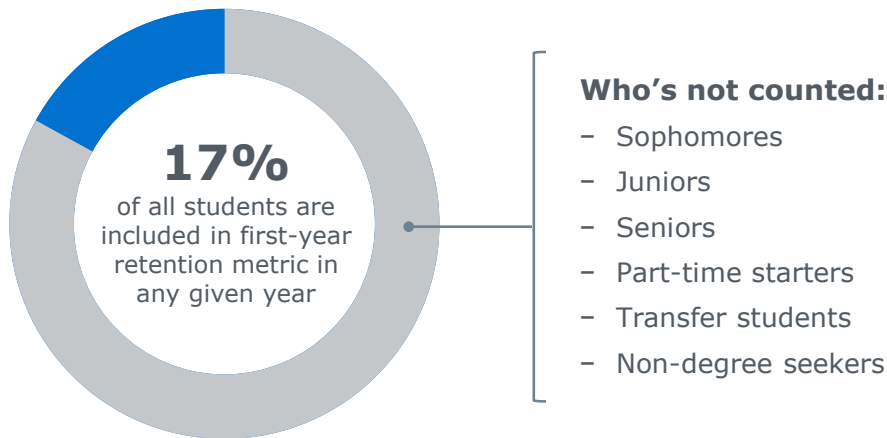
**First-Year
Retention**

What It Has Become

- The basis for state funding formulas
- A key component of college rankings
- A chief indicator of institutional quality
- A measure of our self-worth

The Trouble With the First-Year Retention Metric

FYR Misses Most Students and May Not Be the Best Measure of Performance



*"Turning first-year retention into **some sort of icon** is not helpful. If we measure our success only by first-year retention, we are disserving our students and misunderstanding ourselves."*

Gary Daynes, provost, Barton College

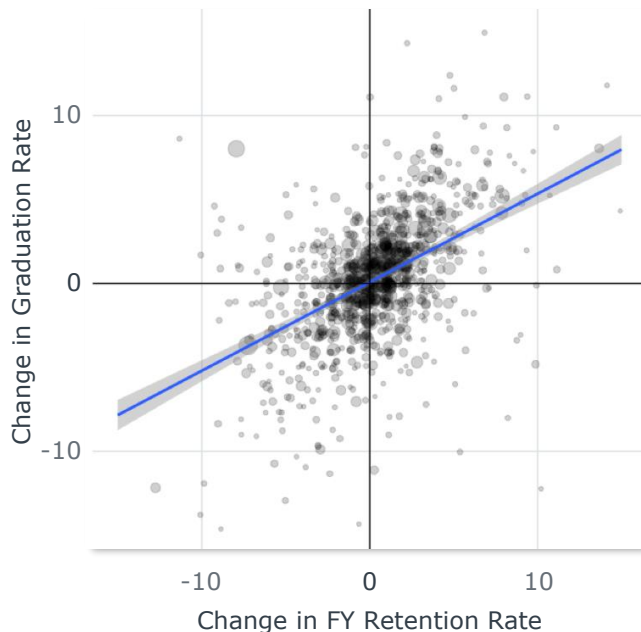


A Poor Predictor of Success?

Gains in First-Year Retention Rarely Produce Similar Gains in Graduation

Change in First-Year Retention vs. Change in Six-Year Graduation

N = 1,011 colleges and universities



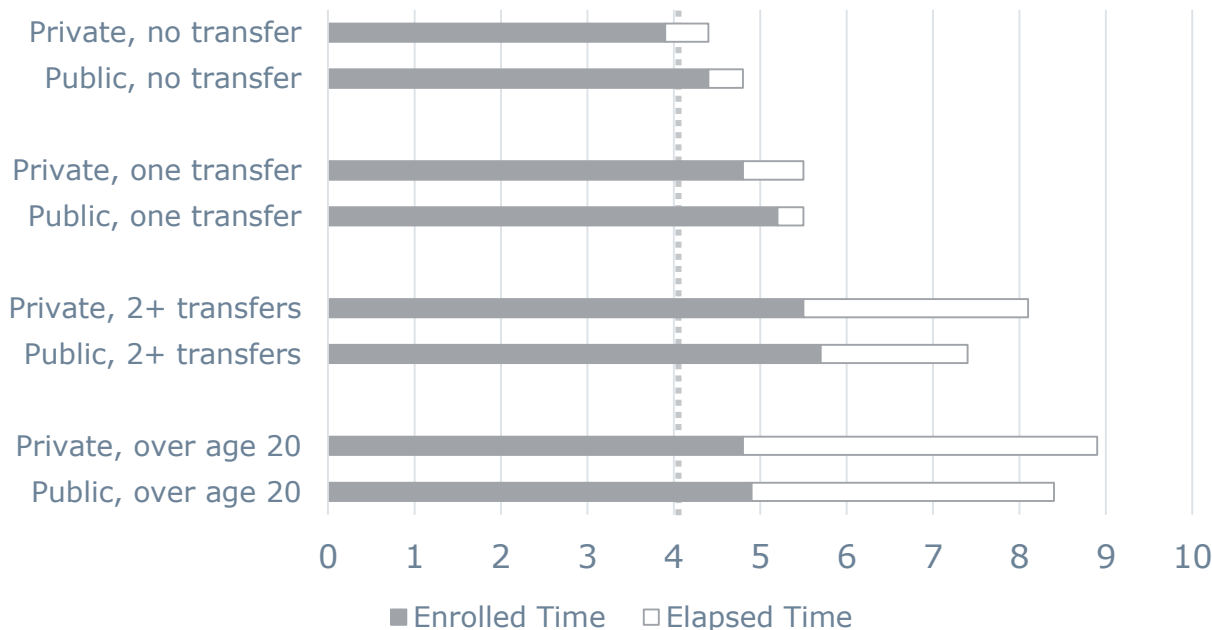
Low R-squared (0.2304) suggests a weak relationship between the metrics

2% retention improvement produces a **1% graduation** improvement

Taking Too Long

First-Year Retention Does Nothing to Track the Time to Degree Problem

Time to Degree in Years

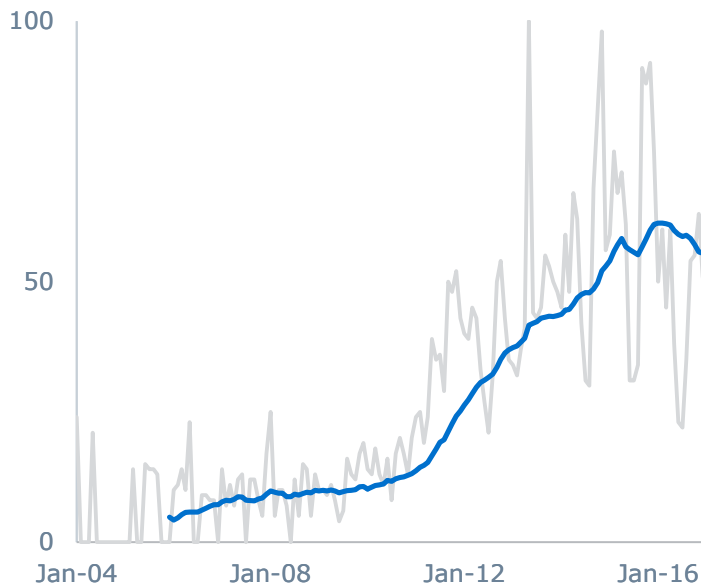


Source: Shapiro D, et al., "Time to Degree: A National View of the Time Enrolled and Elapsed for Associate and Bachelor's Degree Earners," Signature Report No. 11, September 2016, Herndon, VA: National Student Clearinghouse Research Center; EAB interviews and analysis

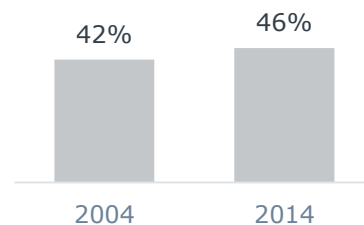
A Growing Crisis of Confidence

Public Skepticism Rising as Students Pay More but Don't Get Better Returns

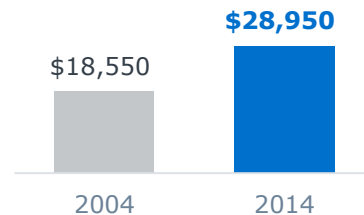
"Is College Worth It?"
Google Trends 2004-2016



Underemployment for Recent Grads (22-27)



Average Student Debt at Graduation



Source: Google Trends search "Is college worth it"; Federal Reserve Bank of NY:
https://www.newyorkfed.org/research/college-labor-market/college-labor-market_underemployment_rates.html#;
https://ticas.org/sites/default/files/pub_files/classof2014.pdf; EAB interviews and analysis;

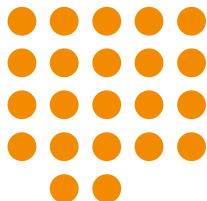


What Actually Happens to Our Students?

A True Perspective on Outcomes Demands a New Set of Success Metrics

For Every **100 Students** Who Start a Bachelor's Degree...

22 Drop out of college



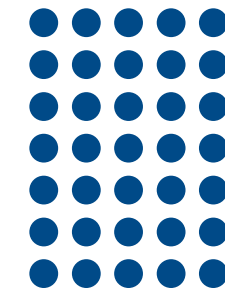
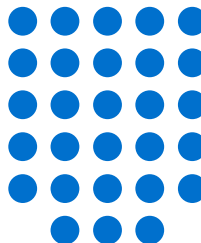
12 Still enrolled after six years



3 Earn an associate's



28 Graduate but are underemployed



35 Graduate and are working a job requiring a BA by age 27

Our new student success mandate:

Graduate more students...

...in less time, at lower cost...

...with better post-grad outcomes...

...to deliver a better Return on Education

Source: Shapiro D, et al., "Completing College: A National View of Student Attainment Rates – Fall 2010 Cohort (Signature Report No. 12)" National Student Clearinghouse Research Center (2016); Federal Reserve Bank of NY: https://www.newyorkfed.org/research/college-labor-market/college-labor-market_underemployment_rates.html#; EAB interviews and analysis



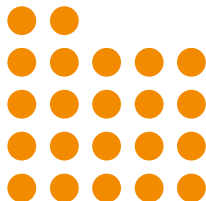
Responding to the New Mandate

SECTION

1

Breaking Free of the FY Retention Tunnel Vision

Members Prioritizing an Expanded Set of Institution Metrics That Match Goals

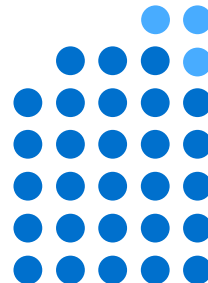


GRADUATE MORE

Generating a Better
Return on Education



LESS TIME/LOWER COST



BETTER OUTCOMES

- **First-Year Retention**
- Sophomore Retention
- Transfer Retention
- Overall Persistence
- Six-Year Graduation
- Degrees Conferred

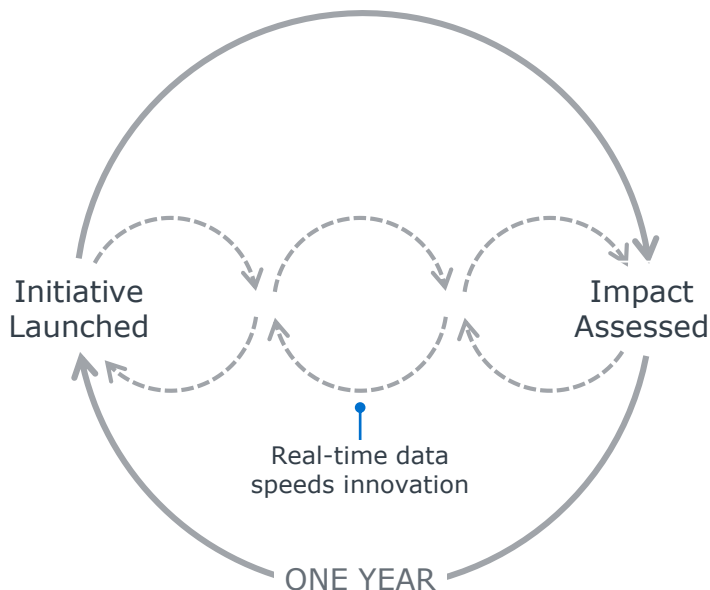
- Credit Attempts per Term
- DFW Rate
- Four-Year Graduation
- Average Time to Degree
- Excess Credits at Graduation

- Career Readiness Index (TBD)

Speeding Up Innovation and Progress

Increasingly, Schools Using Real-Time Data to Drive Faster Results

Our Innovation Cycle Takes a Full Year



Real-Time Data You May Already Track

- Next-term enrollment
- Student contacts
- Response rates
- Advising notes
- Financial aid
- Registration holds
- Appointments
- Course registrations
- Degree plans on file
- Graduation applications
- Progress reports
- Instructor response rate
- Open alerts
- Closed alerts
- Referrals

Linking Big Goals to Manageable Metrics

Real-Time Process Metrics Are the Key to Hitting Our Audacious Targets

- Graduate More
- Less Time / Lower Cost
- Better Outcomes

- First-Year Retention
- Sophomore Retention
- Transfer Retention
- Overall Persistence
- Six-Year Graduation
- Degrees Conferred

- Next-term Enrollment
- Student Contacts
- Response Rates
- Advising Notes
- Financial Aid
- Registration Holds
- Appointments



**Big Hairy
Audacious
Goals (BHAGs)**



**Expanded
institutional
metrics**



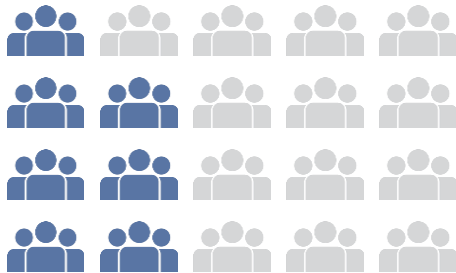
**Real-time
process
metrics**

Mobilizing for Success

Many Institutions Now Making Major Investments in Advising Infrastructure

Institutional Investments in Advising

Last Three Years (2013-2016)



36% have invested in adding additional **advising staff**

Goals:

- Reduce advising ratios (300:1 target)
- Supplement faculty advising
- Install “success advisors”



44% have invested in new **advising technologies**

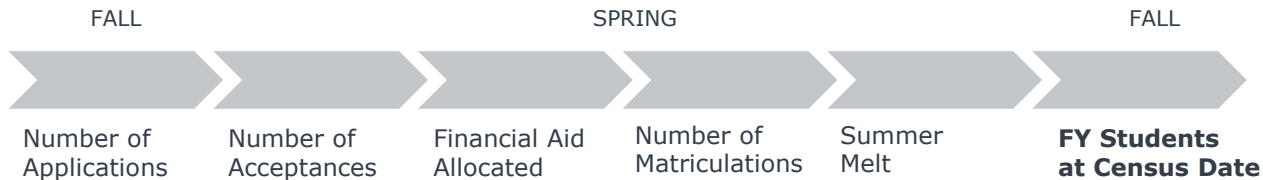
Goals:

- Optimize advisor efforts
- Provide better customer service
- Network support offices

Enter the Enrollment Managers

Once Outsiders, VP EMs Bring a Management Perspective to Success Efforts

VP EMs Are Already Experts at Using Real-Time Metrics...



...and Are Getting Increasingly Involved in Student Success Efforts



65%

serve on their institution's student success team



42%

lead their institution's student success team



45%

expect their role to expand

The Elements of “Student Success Management”

An Emerging Discipline



**“Success Advisors” +
Enrollment Managers**



**Student Success
Management System**



**Real-time
Process Metrics**



Student Success Management

SECTION

2

1

Graduate More Students

2

In Less Time and at Lower Cost

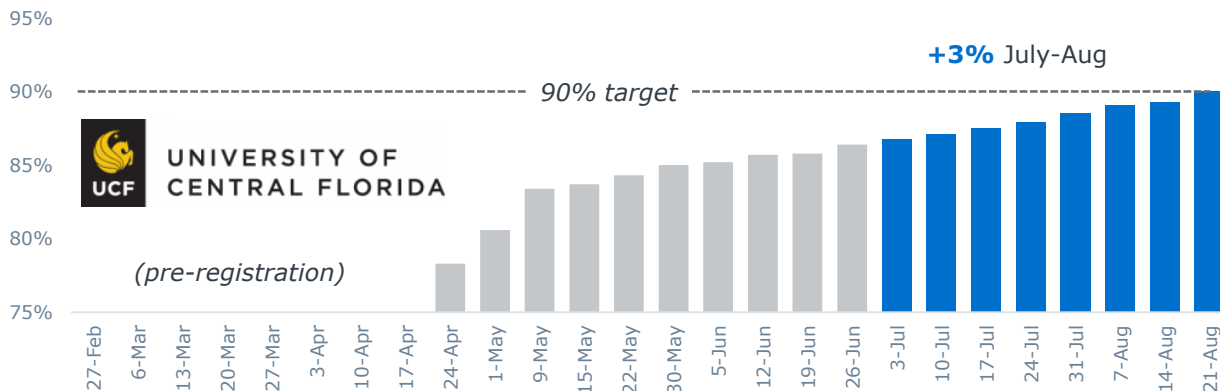
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With Better Post-Graduate Outcomes

Registration Mega-Campaign

Multiphase Strategy Saw Big Gains by Providing “Personalization at Scale”

Weekly FY Retention Tracker, Summer 2017



Phase 1: Feb-March

Pre-registration guidance

- Proactive advising targeted to five at-risk populations

Phase 2: April-June

Mass communication

- Multiple rounds of email, robo-calls, and texts to non-registered students

Phase 3: July-August

Personal connections

- Text campaigns offering individualized assistance
- Personal calls from campus administrators
- Holds and fees deferred

Comprehensive Benchmark Reports

Weekly Emails Benchmark Progress, Create Visibility, and Build Urgency

FROM: Rick Sluder, VP Student Success

TO: Everyone

Sophomore Retention as of Week 30, 2017

	Week 30 2015	Week 30 2016	Week 30 2017	YOY Diff	Fall 2017 Target
All Sophs	81.6	81.6	81.5	-0.1	82.6
CBAS	--	--	--	--	--
CBHS	--	--	--	--	--
COB	--	--	--	--	--
COE	--	--	--	--	--

Registration Progress Benchmarked in Four Ways:

- 1 By Student Population
- 2 By Academic College
- 3 Vs. Previous Years
- 4 Vs. Institutional Goals



Gains Since 2014:

+8.5%

First-Year
Retention

+3.2%

Sophomore
Retention



Each unit understands its role in hitting goal and how close it is to the mark

Ad Hoc Registration Committee

Small Schools Supplementing Advisor Outreach with Community Efforts

Keene
STATE COLLEGE

4,650 undergraduates

Campaign to register
unenrolled students

431 students targeted

Southwestern
University

1,500 undergraduates

Campaign to resolve
outstanding balances

80 students targeted

Getting Help from Staff with a Personal Connection to the Student

- Residence Life
- Athletic coaches
- Multicultural affairs
- Work study
- Career services
- Student Affairs
- Parent programs
- Scholarships
- Instructors
- TRIO

65%
of contacts at
Keene State

Keys to Success

- 1 Train staff with positive scripting *"We want to help"*
- 2 Give students a clear call to action *"Please pay your balance at the business office"*
- 3 Track distributed contacts centrally **Pro-tip:** Use Campus or a Google Doc to track your progress

Reenrollment Campaign Dashboard

Tracking Campaign Progress and Gathering Additional Data for Analysis

How It Works

Oversight on progress

Dashboard tracks weekly summary of unregistered students in each college

Rich data gathering

Users log each student contact and its result

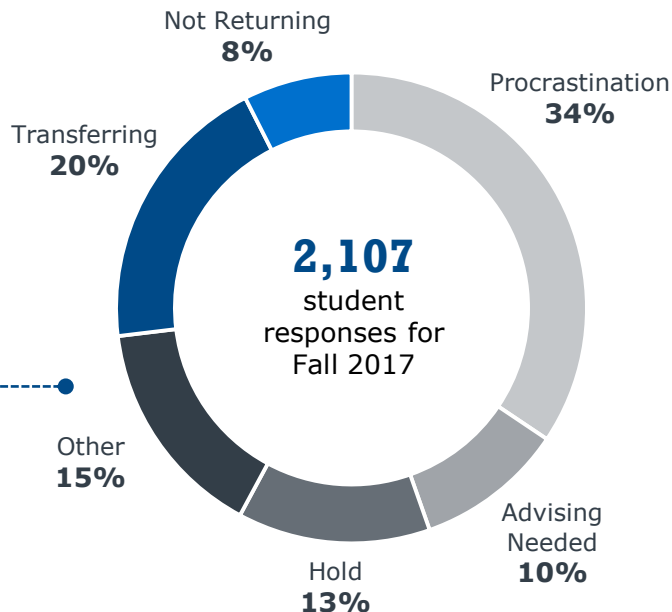
- Type of outreach
- Purpose of outreach
- Connection Y/N
- **Student intention**
- Do they need more help?

974 Advisor, tutor, and faculty users



TEXAS TECH
UNIVERSITY.

Why Aren't Students Registering?



Registration Hold Deferment

Hold Relief Gets UCF Students Registered for the Fall Term

Summer 2017 Registration Holds



UNIVERSITY OF
CENTRAL FLORIDA

Hold Type	Students Impacted	Resolution
Student Accounts	1,650	Raise balance threshold from \$100 to \$500
Housing	150	Raise threshold
Student Health	52	Defer to next term
Parking	29	Defer to next term
Advising Hold	26	Defer to next term
Student Conduct	12	Personal outreach



30% of the first-year
class impacted

Are All These Holds Really Necessary?

CU Denver: **42 hold types**
that could prevent registration

Wayne State: **56 hold types**
that could prevent registration

Both campuses undergoing a
strategic review to eliminate
obsolete or unhelpful holds



Emergency Microgrants

Grant Award Caps a Weeklong Sprint to Clear Balances and Prevent Purges

MONDAY

Drop-Add Opens

List created of students with unpaid balances

Students who can pay other ways removed

List updated each hour as accounts clear

Students ranked from smallest to largest balances

Funds awarded down the list until exhausted

FRIDAY

Unpaid students purged

Students removed from list if they:

- Pay their balance when nudged
- Are waiting on confirmed financial aid
- Have some loan eligibility remaining

Award Quick Facts:

Awards range from **\$7 to \$2,000** with an average of **\$500**

\$140,000
distributed to 251 students in 2016-17

\$1.5 million
in tuition revenue preserved/recaptured

Over 1,000%
immediate return on investment



Strategic Microgrants

Considering Equity, Impact, and ROI When Awarding Emergency Grants



30%

Of students have financial issues



20%

Cannot pay on their own



10%

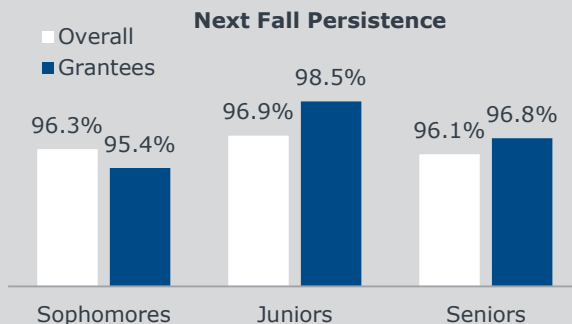
Are prioritized for microgrants

Who Gets Prioritized (and Why)?

- 1 Underserved Populations (Equity)
- 2 Smaller Balances (Max Impact)
- 3 High Likelihood to Graduate (ROI)



Grantees Retained at Comparable Rates



"Likelihood to Graduate" Gauged by Many Criteria

- Progress to degree
- Registration status
- *Campus* risk score
- *Campus* notes
- Financial aid eligibility
- Entrance scores
- Date of last payment
- Transcript requests
- Email response rate

1

Graduate More Students

2

In Less Time and at Lower Cost

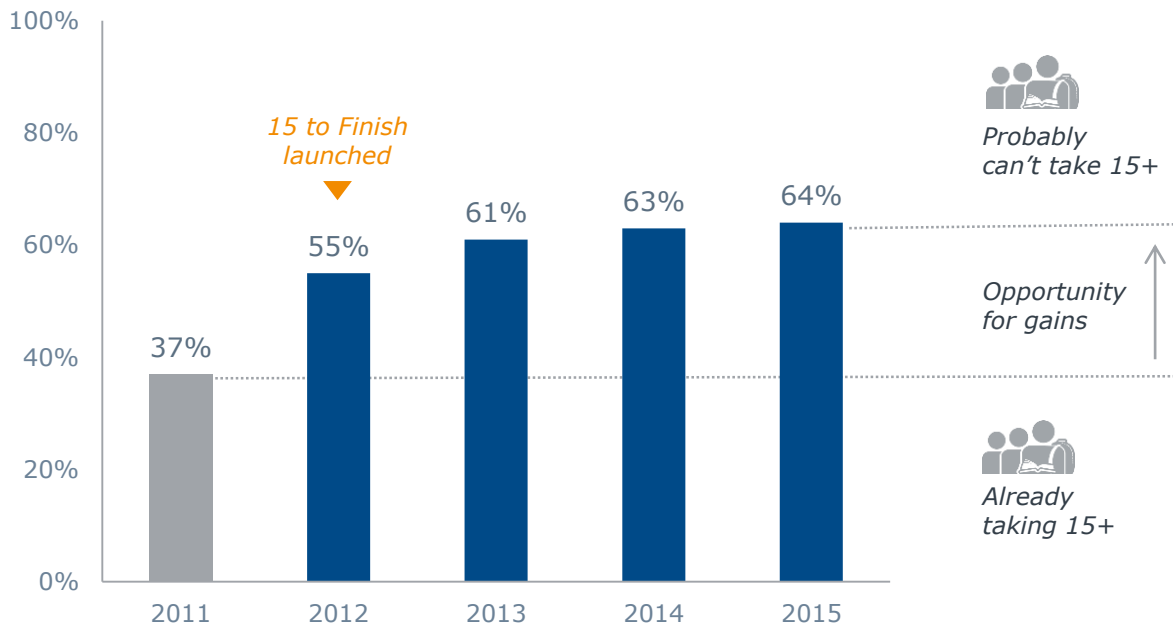
3

With Better Post-Graduate Outcomes

“15 to Finish” Works

But Seems to Have an Upper Limit on Impact

FT/FT Students Taking 15+ Credits per Term State Flagship University



Degree Plan Mega-Campaign

Massive Top-Down Goal Achieved Through Bottom-Up Progress Tracking

Goals Flow Down

Mandated the use of degree plans in advising

Set the goal to get plans on file for **80% of students**

Developed custom “plans of attack” for their units



Provost



AVP Student Success & Advising Leadership



10 Advising Directors

Results Roll Up

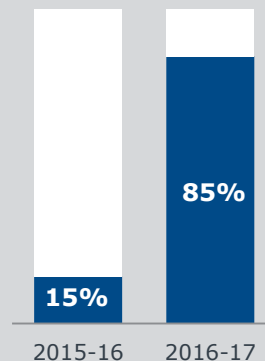
23,746
degree plans on file
in just 20 weeks

Reviewed overall progress every two weeks

Committed to **20-30 plans** per advisor per week

UTSA®

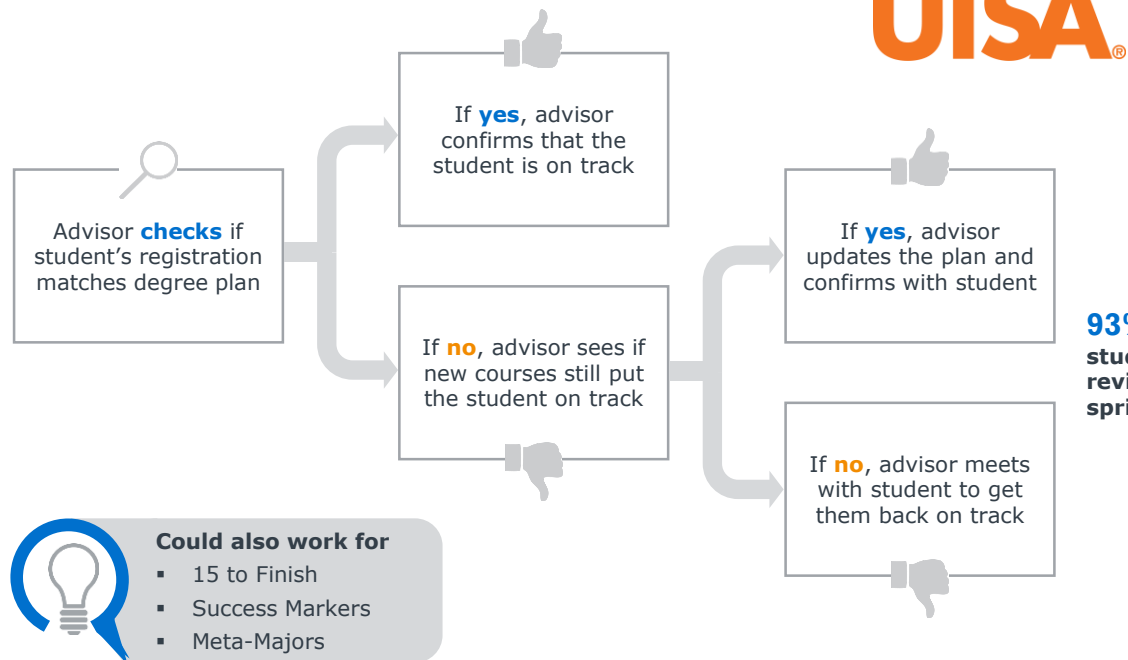
Students with Degree Plans on File



Degree Plan Checkup

Once-a-Term Review Ensures That Students Take the Right Classes

Step-by-Step Degree Plan Review



Graduation Application Campaign

Targeted Outreach Pulls Forward Graduation, Shortens Time to Degree



Campaign Criteria:

- ✓ Over 104 credits
- ✓ GPA: 2.5-3.5
- ✓ No financial holds
- ✓ Not applied to graduate
- ✓ College-specific criteria (e.g., capstone class)



905

seniors contacted



56%

applied to graduate



+3%

increase in
six-year grad rate



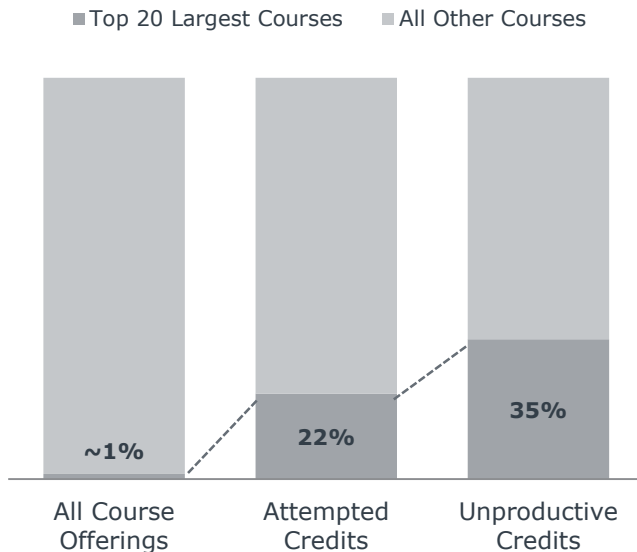
+7%

increase in
four-year grad rate

Where Should We Start?

Focusing on a Small Set of High-DFW Courses Could Produce Big Gains

A Handful of Large Courses Generates Large Share of Unproductive Credits



Further narrow the focus using Institution Reports



Partner with faculty to redesign some courses



Offer supplemental instruction and support



Use Progress Reports to target interventions

Progress Report Mega-Campaign

Four Critical Moments Targeted for Reporting Across the Semester

Progress Report Calendar

Targeting First- and Second-Year Courses



1

Week 2

- Absenteeism

55% response rate

225 at-risk cases

2

Week 4

- Absenteeism
- Participation
- Assignments

25% response rate

553 at-risk cases

3

Week 8

- Midterm grade of C or below

23% response rate

712 at-risk cases

4

Week 10

- Finals concerns
- Students close to earning an A

21% response rate

825 offered help

48 hours

Students contacted by advisors within two days of alert

1,249 faculty

participated in 2016-17
(up 35% over 2015-16)

"Collecting more data has helped us to analyze trends and provide feedback to faculty for additional collaboration."

– Monica Burnette
Director, Projects and Planning

Faculty Messaging

Successful Faculty Strategies from Small Institutions Could Work Anywhere

Small Schools Leading the Way on Progress Report Participation



90% faculty participation



98% faculty participation



83% faculty participation



92% faculty participation



86% faculty participation

What Are the Secrets of Their Success?

- 1** Set expectations at the start of the term
- 2** Ask for faculty input on reporting dates
- 3** Send reminders before due dates
- 4** Allow faculty up to a week to respond
- 5** Ask chairs to nudge non-responders
- 6** Close the loop when alerts are resolved

Erin Wheeler
AVP Retention & Student Success
Kentucky State



"Faculty won't mind working with you if you give them the right tool and the right direction."

Targeted Early Alerts

Three Examples of How Schools Are Focusing Efforts for Maximum Impact

How Are You Focusing Your Academic Support Outreach?



Targeting small first-year courses

Absentee reports requested from First-Year Experience and English Comp sections

Advantage

Small class size and friendly instructors make it easier to get compliance



Targeting success marker courses

Progress reports requested from highly predictive courses across all class years

Advantage

Biggest bang for the buck by addressing the courses that matter most



Targeting murky middle students

Course alerts reviewed for mid-risk students as part of a coordinated intervention

Advantage

Support efforts are targeted to address a specific institutional goal

Case Follow-up Protocol

Clearly Defined Processes and Centralized Control Maximizes Case Closure



Central Command and Control (1 hour per day)

- All alerts go to a single inbox, and the director reassigns to advisors daily
- Director monitors case progress daily and follows up with advisors as needed



TEXAS A&M UNIVERSITY
SAN ANTONIO

Kim Naney

Director, Student Academic Success Center

Follow-Up Starts Immediately

First 48 hours: Email from advisor

Next 48 hours: Call from advisor

2 weeks: Second email

4 weeks: Close case

424 total alerts
processed in 2016-17

Case Closed Reasons

50% Referred to instructor

20% Referred to support office

10% Put on success plan

20% No contact from student

Eye to the future: Collecting this data will allow for effectiveness analyses in the future

1

Graduate More Students

2

In Less Time and at Lower Cost

3

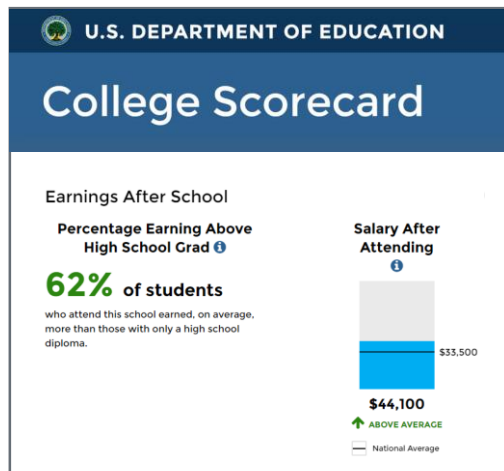
With Better Post-Graduate Outcomes

No Agreement on How to Measure Outcomes

Measures of Salary, Placement, and Satisfaction Abound; All Are Imperfect

Common Outcomes Measures

- 1 Earnings/Salary
- 2 Placement Rate; Placement Rate at Top Companies
- 3 Student Satisfaction Surveys
- 4 Alumni Giving



Common Limitations of Outcomes Rankings



No control for institution type or reputation



No control for added impact of advanced degrees



No control for early salary skew in technical fields

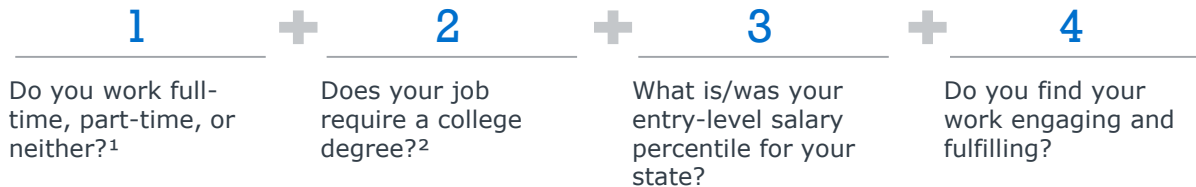


No control for geography and urbanization

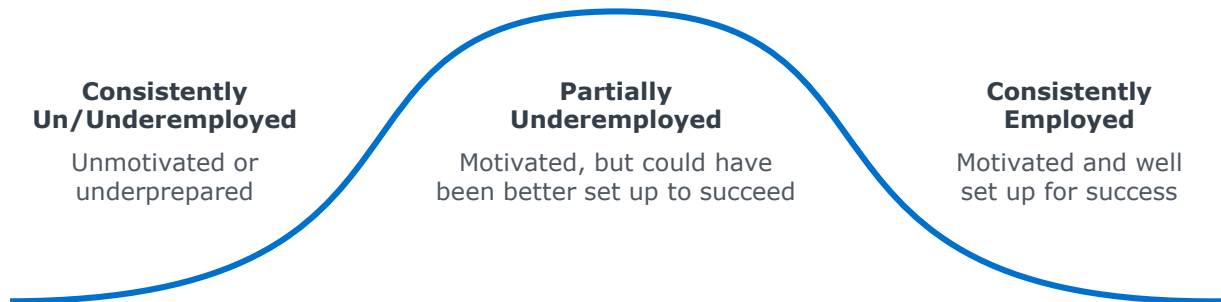
Understanding What Actually Happens to Alums

EAB Methodology Compares Students to Peers from Their Own Institution

EAB Holistic “Gainful Employment Score” Based on Four Main Factors



Alumni Career Outcomes Fall into Three Basic Categories



1) Includes options to list continuing education

2) Allows alumni to indicate whether their job lists a college degree as preferred

Could We Measure and Address Career Readiness?

Survey Data Points to Campus Experiences Correlated with Outcomes

How Do We Understand What On-Campus Experiences Led to Better Survey Scores?



Alumni Survey
Score



SIS Platform
Data



Academic
Data (SIS)



Career
Services Data



Cocurricular
Data

Early Findings Suggest Readiness Can Be Tracked with Granular, Real-Time Data

1 Engagement with career services
and use of career services resources



- Appointments
- Résumé completed

2 Completion of internships and
other professional experiences



- Work experience
- Applications

3 Networking with mentors,
peers, and alumni



- Outreach
- Events

THANK YOU



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