Quantifying the Impact of Your Student Success Initiatives

Part Two: Evaluating Outcomes Using Navigate

Student Success Collaborative

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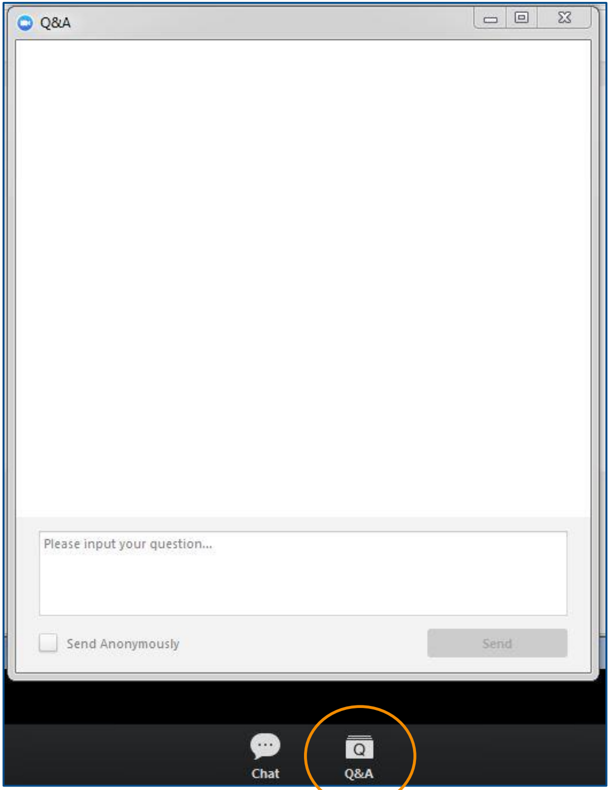
Type your question here



Presenters for Today

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1. **Focus on Planning and Evaluation**
2. Step One: Analyze and Report on Results
3. Step Two: Iterate and Scale Impact
4. Recap and Next Steps
5. Q&A

Why is Identifying Impact So Important?

To Name a Few Reasons…

For You

- Make the case for resources, whether continuing or additional
- Self-assess to understand what is working and what is not
- Deploy your resources where they will be most effective
- Celebrate your successes more broadly
- Share your story to help other institutions

For Us

- Prove the need for expanded capabilities in highly impactful areas
- Better understand the impact of our recommended practices
- Inform our staff of where you need different types of support
- Share greater diversity of stories broadly to help our membership
- Continue expanding our offerings and membership

And Ultimately to Provide a Return on Education (ROE)

Source: EAB interviews and analysis.

Why Does Defining Impact Remain So Hard?

More Focus Needed in Planning and Evaluation

Focus often here

Plan → **Act** → **Evaluate**

Leading to Common Challenges

- Work does not align with institutional goals
- Data not collected to allow for easy evaluation
- Purpose not clear, leading to “analysis paralysis”
- Potentially ineffective practices continue to be implemented
- Several initiatives happening at once, impact of each unknown

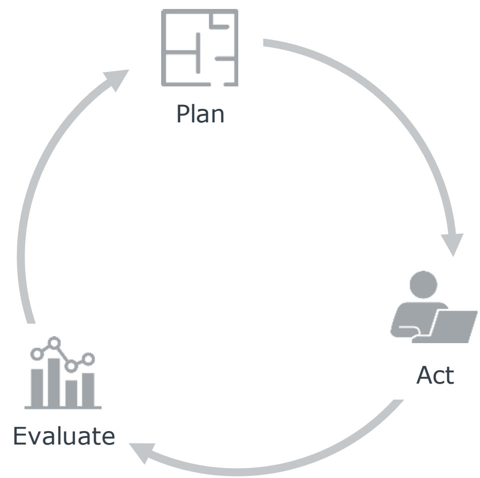
Source: EAB interviews and analysis.

Shifting to a Two Part Effort

From One-Time Initiatives to Continuous Improvement

1 Translate Institutional Goals into Technology-Enabled Objectives

2 Sustain Momentum Through Ongoing Evaluation

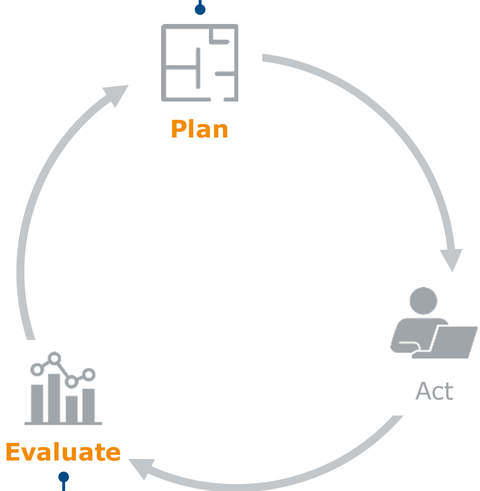


Source: EAB interviews and analysis.

A Useful Framework for Analyzing Impact

Focus on These Steps Annually to Hardwire Evaluation Into Your Approach

Sustain Momentum Through Ongoing Evaluation



Plan

- ☑ Define objectives and metrics
- ☑ Design evaluation strategy

Evaluate

- ☑ Analyze and report on results
- ☑ Iterate and scale impact

Source: EAB interviews and analysis.

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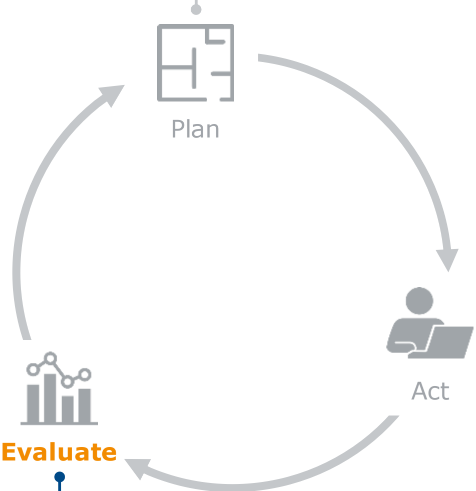


Plan

- ☑ Define objectives and metrics
- ☑ Design evaluation strategy

Watch Recording of Part One

Evaluate

- ☑ Analyze and report on results
- ☑ Iterate and scale impact

Focus for Today

Source: EAB interviews and analysis.

1 Focus on Planning and Evaluation

2 **Step One: Analyze and Report on Results**

3 Step Two: Iterate and Scale Impact

4 Recap and Next Steps

5 Q&A

Before You Begin Any Analysis

Important Reminders to Set You Up for Success

Identify Populations

Students to include in your analysis

- **Intervention Population:** The students involved in your initiative
- **Comparison Population:** A control population to evaluate your initiative against

Pick Data Sources

Where to find the data you need

- **Available in Navigate:**
  - Intervention Effectiveness
  - Reports
  - Activity Analytics
  - Exported Student Lists
- **Other internal sources:**
  - Survey, focus group, or interview data
  - Institutional Research data sets
  - Self-tracked data
  - Other internal systems, like LMS

Set Up Data

Prepare your data sets

- **Snapshot data** before starting your intervention, including both intervention and comparison populations
- Create a **naming convention** for Campaigns and Watch Lists for easy finding
- **Handle data securely**, using secure file sharing mechanisms or systems

Choose Your Method of Analysis

Three Primary Ways to Analyze Your Initiatives

1

Intervention Effectiveness

Tool available within Navigate to compare the changes in a population or between populations of students within a selected period of time.

2

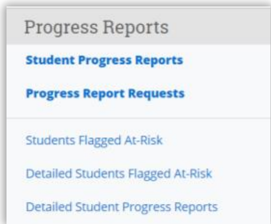
On Your Own

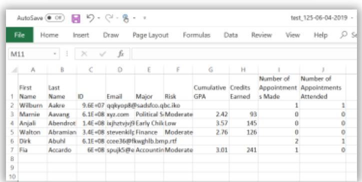
Download Navigate reports and/or student lists, and combine with other data sources to analyze on your own in the tool of your choice.

3

Campus Experts

Partner with your Institutional Research office, graduate assistants, or any other assessment and evaluation experts on your campus.





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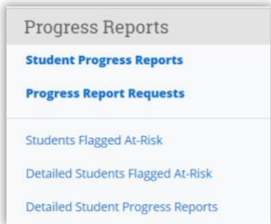

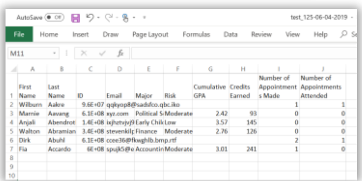

	A	B	C	D	E	F	G	H	I	J
1	First Name	Last Name	ID	Email	Major	Risk	Cumulative GPA	Credits Earned	Number of Appointments Made	Number of Appointments Attended
2	Wilburn	Aakre	9.6E+07	qqkyop8@sadsfco.qbc.iko					1	1
3	Marnie	Aavang	6.1E+08	xyz.com	Political S	Moderate	2.42	93	0	0
4	Anjali	Abendrot	1.4E+08	ixjhztvjvj9	Early Chik	Low	3.57	145	0	0
5	Walton	Abramian	3.4E+08	stevenkilp	Finance	Moderate	2.76	126	0	0
6	Dirk	Abuhl	6.1E+08	ccee36@fkwghlb.bmp.rtf					2	1
7	Fia	Accardo	6E+08	spujk5@e	Accountin	Moderate	3.01	241	1	0
8										
9										
10										

3

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Introducing Intervention Effectiveness

Use EAB's Newest Intelligence Tool to Gauge Effectiveness

Primary use case…

Intervention Effectiveness allows you to **compare the changes** in a population or between populations of students within a selected period of time.

Important Note - Intervention Effectiveness is only available to members with access to the Navigate Intelligence module.

Key features include…

- Three different options for analysis, based on student population and time period
- Outputs of key performance, progress, and enrollment metrics
- Narrow population by common student attributes or in-platform interventions
- Drill down lists of students, can download into Excel
- Permission-based
- "Start Here" help text

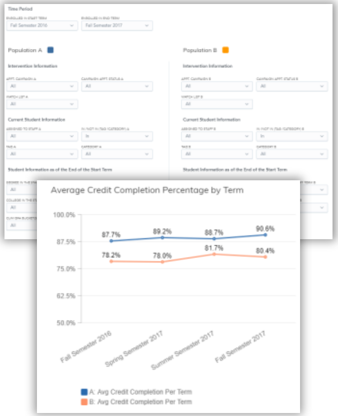
When and When Not to Use Intervention Effectiveness

Certain types of analyses are well suited to analyze using Intervention Effectiveness, while others are not. For example, Intervention Effectiveness offers a number of enrollment, academic progress, and academic performance outcome variables, but does not offer the ability to analyze all possible outcome variables (i.e., grade changes in a course, student satisfaction, etc.)

Use Intervention Effectiveness for Analysis

Example Interventions to Analyze

- 15 to Finish campaigns
- Registration/re-enrollment interventions
- Application to Graduate campaigns
- Pre-probation GPA interventions



Use Other Tools for Analysis

Example Interventions to Analyze

- Grade changes (progress reports/tutoring)
- Stop-out campaigns
- Historical initiatives more than 1 year ago that rely upon Categories as a filter

Reports Available in Intervention Effectiveness

Three Types of Reports with Unique Comparison Groups

One Population	Two Populations, One Time Period	Two Populations, Two Time Periods

One Population

For when you do not have a separate comparison group and must compare students to themselves in different terms.

Example Scenario:
Understand success of a "15 to Finish" campaign by comparing the average credits earned/attempted of your population the term before, during, and after the intervention.

Two Populations, One Time Period

For when you have a treatment and control group/similar population and want to compare them within the same period of time.

Example Scenario:
Understand success of a registration campaign by comparing outcomes of students who completed an appointment to students who were in the campaign, but did not complete an appointment.

Two Populations, Two Time Periods

For when your intervention/program was rolled out to all or most students in a cohort and you wish to compare students to a similar group of students at a different point in time.

Example Scenario:
If you rolled out Navigate Student to first year students in Fall, you might want to compare outcomes for those students to outcomes for first year students the previous Fall.

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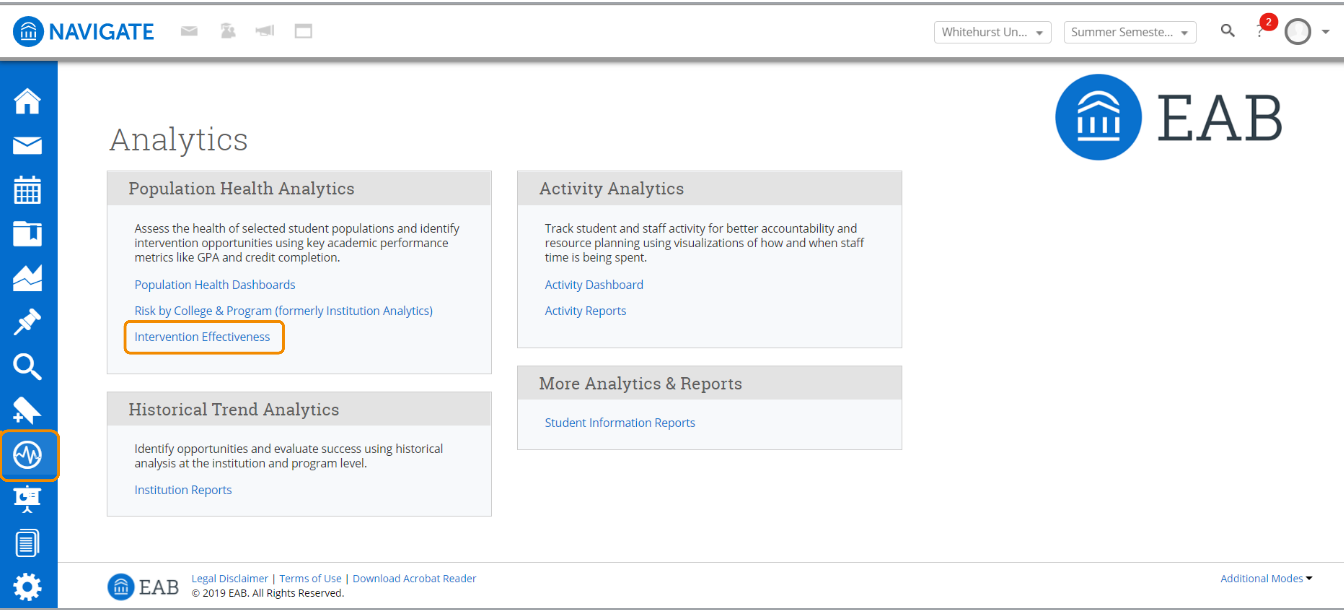
Accessing Intervention Effectiveness

Link Available With the Proper User Permission*



* Intervention Effectiveness only available to Navigate members with the Intelligence module.

Recap of Registration Campaign Steps

How to Use Intervention Effectiveness

What we Analyzed:

- **Report:** We used the "Two Populations, One Time Period" report
- **Filters:** We used a watch list for each group of students based on parameters we decided before our intervention
- **Metrics:** We looked at an outcome variable related to our intervention and our theory of change; in this case, registration for a subsequent term

Enrollment Summary	Start Term Fall Semester 2016	End Term Fall Semester 2017	Percent of the Start Term
A: Enrolled	499	362	72.5%
B: Enrolled	313	210	67.1%
A: Graduated	—	0	0.0%
B: Graduated	—	0	0.0%
A: Not Enrolled	—	137	27.5%
B: Not Enrolled	—	103	32.9%

Further Questions to Ask Yourself:

- Should you screenshot these numbers to put into a report template, or download the student lists for further analysis?
- What other context or information will you need to report on these outcomes?

Choose Your Usage Strategy

Matrix of Considerations When Making Your Decision

	Broad Access	Unit-Level Leaders	Centrally Managed
Visibility of Student Data	High	Moderate	Low
Needed Training and Support	High	Moderate	Low
Control Over Responsible Usage and Interpretation	Low	Moderate	High
Avg. Time Per Person Spent Analyzing Data	Low	Moderate	High

REMEMBER

Anyone with access to the Intervention Effectiveness tool can view all student data, including all watch lists and appointment campaigns.

Choose Your Method of Analysis

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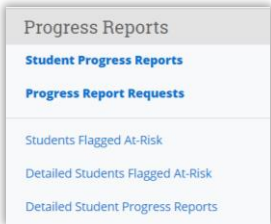
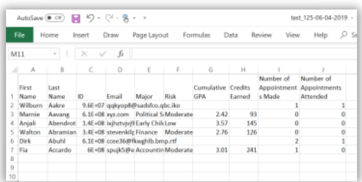
Download Navigate reports and/or student lists, and combine with other data sources to analyze on your own in the tool of your choice.





3

Campus Experts

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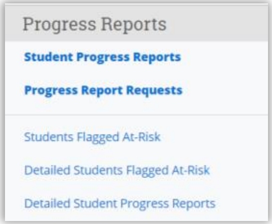
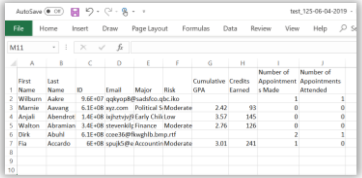
When and When Not to Analyze On Your Own

While certain types of analyses are well suited to analyze using Intervention Effectiveness, many may not based on the specific data sets and metrics you are using to evaluate your initiatives. We recommend considering analyzing your outcomes using Excel or another tool at your disposal, and pulling data from Navigate reports.

Analyze On Your Own When…

- A standard tool does not exist (e.g., if you are analyzing changes in student satisfaction or course grades)
- Your data is set up in such a way that the standard tool may not work for your use case (e.g., the population is stop-out students)





	A	B	C	D	E	F	G	H	I	J
1	First Name	Last Name	ID	Email	Major	Risk	Cumulative GPA	Credits Earned	Number of Appointments Made	Number of Appointments Attended
2	Wilburn	Aakre	9.6E+07	qqkyop8@sadsfco.qbc.iko					1	1
3	Marnie	Aavang	6.1E+08	xyz.com	Political S	Moderate	2.42	93	0	0
4	Anjali	Abendrot	1.4E+08	ixjhztvjvj9	Early Chil	Low	3.57	145	0	0
5	Walton	Abramian	3.4E+08	stevenkilp	Finance	Moderate	2.76	126	0	0
6	Dirk	Abuhl	6.1E+08	ccee36@fkwghlb.bmp.rtf					2	1
7	Fia	Accardo	6E+08	spujk5@e	Accountin	Moderate	3.01	241	1	0

Potential Drawbacks to Consider

- Your analysis may require statistical knowledge you might not possess
- Your analysis may rely on datasets you do not have access to
- It may take more time to analyze on your own than to use a tool or involve others in the analysis process

Back to Our Theory of Change from Part One

Select Metrics that Relate to your Theory of Change for Each Intervention

Theory of Change
A methodology that asks designers of an intervention (such as a student success initiative) to think through why an intervention will bring about desired results.

Early Alert Intervention Example

What is our theory of change?

We think that faculty providing **early alerts** for students struggling with their first-year coursework will allow for **earlier advising and/or tutoring intervention**.

These interventions will lead to increases in class and tutoring attendance, thereby improving the student's grade in the course and their overall GPA, and **lowering the DFW rates** overall.

Process Metrics

- Percent of faculty who submitted early alerts
- Number of tutoring appointments scheduled
- Changes in course attendance
- Percent of case referrals closed

Outcome Metrics

- Change in student grade in courses
- Changes in term/cumulative GPA
- Changes in DFW rates for Progress Report courses

Don't misattribute results - Without a theory of change, many outcomes can be misattributed to your intervention.

Pick the Right Data Sources

Use a Combination of Navigate and Other Systems

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 Report Reports
- Student Information Reports

Student Academics

- Watch Lists
- Advanced Search
- Population Health Dashboard*
- Intervention Effectiveness*

** Only available for members with the Intelligence module*

Other Potential Data Sources

- Survey, focus group, or interview data
- Institutional Research data sets
- Self-tracked data
- Other internal systems, like LMS

Be sure to include data for any subpopulations of interest, like Murky Middle, first generation, or student classification. You may need to add these data points to your master data set.

Mapping Metrics to Available Navigate Data

Work Through a Similar Exercise to Identify your Data Sources

Where to Find Progress Report (PR) Related Data in Navigate

Type	Metric	Location	Important Fields
Process	Percent of faculty who submitted early alerts	• **Progress Report Campaigns tab**, in Campaigns page (for individual campaigns) • **Progress Report Requests report**, in Reporting page (for aggregating response rates of multiple campaigns)	• Response percentage (in pie chart) • Course, Response, At Risk?, Instructor, Instructor Name
Process	Number of tutoring appointments scheduled	**At-Risk Progress Reports and Appointments report**, in Reporting page (look for a tutoring Care Unit)	Course, At Risk?, Appointment Created, Appointment Care Unit, Student Attended, Alert Reasons
Process	Changes in course attendance, comparing earlier in the term to later in the term	**Absence Details report**, in Reporting page (data only available if your institution tracks attendance in Navigate) *This report may require connecting data from Progress Report reports, such as **Detailed Student Progress Report report**	Course, Absence Date, Absence Is Excused
Process	Percent of case referrals closed	**Cases report**, in Reporting page *This report may require connecting data from Progress Report reports, such as **Detailed Students Progress Report report**	Alert Reasons, Campaign, Closed At, Closed By, Closed Reason

⚠ **Global Term Filter – If you are pulling reports or looking at campaigns for the previous term, remember to change the global term filter to return all the results for that term.**

Mapping Metrics to Available Navigate Data

Work Through a Similar Exercise to Identify your Data Sources

Where to Find Progress Report (PR) Related Data in Navigate

Type	Metric	Location	Important Fields
Outcome	Change in student grade in courses, comparing midterm (or PR reported grade) to final grade	• **Detailed Student Progress Reports report**, in Reporting page (for changes in grade of those involved in the campaign) • **Students with Courses report**, in Reporting page (for changes in grade of those not involved in the campaign, for comparison purposes)	• Course, At Risk?, Grade (as reported in PR), Midterm Grade (from SIS), Final Grade (from SIS) • Course Name, Midterm Grade (from SIS), Final Grade (from SIS), Total Evaluations, At Risk Evaluations
Outcome	Change in term/cumulative GPA, comparing start to end of term	• **Intervention Effectiveness Performance Summary metric** (using saved Watch List) • **Exported student lists,** from Lists and Searches page (must have snapshotted data before and after intervention)	• Watch List filter, Performance Summary section (includes Average Cumulative GPA and Average Term GPA) • GPA
Outcome	Changes in DFW rates for courses, comparing previous year to current year	• **Course Analysis report,** in Institution Reports page (must have access to tool and refreshed data to relevant term) • **Students with Courses report**, in Reporting page (if no access to Institution Reports)	• Percentage of Ds/Fs, Percentage of Ws, Average Grade • Course Name, Final Grade

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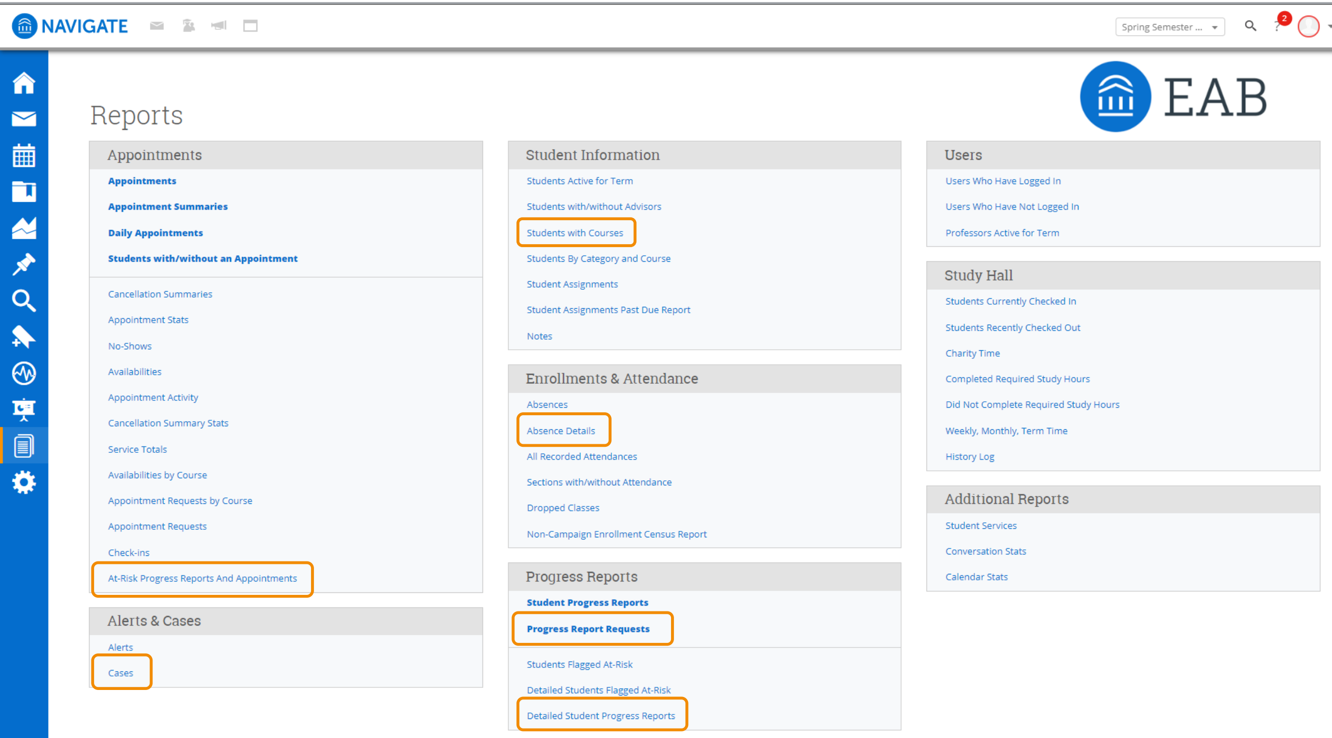
Mapping Metrics to Available Navigate Data

Work Through a Similar Exercise to Identify your Data Sources

Where to Find Progress Report-Related Data in Navigate



Helpful Tips for Using Excel

Master These Tips for Easier Analysis

Important Excel Functions

- =**VLOOKUP**(lookup_value,table_array,col_index_num,range_lookup)
  - Compiles data from two spreadsheets into one, using a unique identifier (either student ID, email address, or course number)
  - Can also pull new data into a spreadsheet for analysis, such as converting letter grades into numerical grades for analysis
- =**CONCATENATE**(text1,text2,…)
  - Creates a unique identifier when needed, such as student ID combined with course number for deeper grade analysis by course
- **Pivot Tables** (select Insert, and then Pivot Table)
  - Easily arrange and summarize complex data into a table and visuals (using Pivot Charts)

Choose Your Method of Analysis

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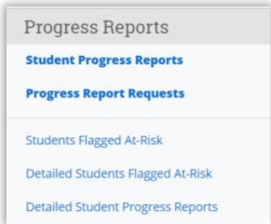

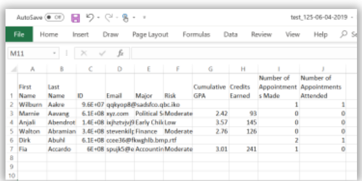

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When and When Not to Involve Campus Experts

If available at your campus, we recommend partnering with your Institutional Research office, graduate assistants, or any other assessment and evaluation experts to support your analysis efforts. These constituents typically have helpful tools, datasets, experience, and expertise at their disposal to ensure a robust evaluation.

Involve Campus Experts When…

- Your analysis will require statistical tools and methods you are not comfortable or fluent in
- Your analysis relies on datasets you do not have access to
- If the analysis may need to be repeated but is not scalable on your own (a great use case for graduate students!)

Potential Drawbacks to Consider

- Time and resources of your campus experts may be limited, so your requests may not be possible or may have a delayed timeframe
- Other experts do not understand the full context of your initiatives and may not take various factors into account
- Missed opportunity to educate and train yourself or your staff on how to effectively evaluate outcomes

Recap: Choose Your Method of Analysis

Three Primary Ways to Analyze Your Initiatives

1

Intervention Effectiveness

Tool available within Navigate to compare the changes in a population or between populations of students within a selected period of time.

- ✔ Many interventions and campaigns, such as registration, 15 to Finish, apply to graduate, and Murky Middle
- ✖ Stop out campaigns, changes in course grades, and historical interventions with data availability issues

2

On Your Own

Download Navigate reports and/or student lists, and combine with other data sources to analyze on your own in the tool of your choice.

- ✔ Interventions where tool does not exist, like stop out and changes in course grades
- ✖ Not scalable, especially if the analysis is time consuming and requires specialized knowledge

3

Campus Experts

Partner with your Institutional Research office, graduate assistants, or any other assessment and evaluation experts on your campus.

- ✔ If experts are available to you, and they have helpful tools, data, and expertise
- ✖ Time and resources may constrain the delivery timeframe for your analysis

Responsible Data Interpretation Guidelines

Be Mindful of How You Draw Conclusions From the Data

Mind your n-values

Avoid relying on a single metric without context

Be careful with averages, they can be misleading

Don’t mistake correlation for causation

Be mindful of selection and self-selection bias

Start with a theory of change

Consider "Who" and "How" When Reporting Out

Identify the Right Stakeholders and Reporting Medium

The Four "P's" of Reporting on Your Successes

People

Who is your audience? Does your audience include your institution's decision makers?

Passions

What does your audience care most about? What should be highlighted in your analysis or story?

Presenters

Who should share the information? What are the best venues for information sharing?

Presentation

What format is needed for different venues or audiences? What context do you need to provide for your results?

Looking for templates? Ask your Strategic Leader!

1. Focus on Planning and Evaluation
2. Step One: Analyze and Report on Results
3. **Step Two: Iterate and Scale Impact**
4. Recap and Next Steps
5. Q&A

Reflect on What Went Well (And Not So Well)

Identify Opportunities for Future Improvement in Future Iterations

?

Questions to Inflect Future Iterations

- Which parts of the intervention(s) do you think went well? Not so well?
- Do you think the intervention(s) accomplished its goals? Why or why not?
  - If you have negative or neutral results do you understand the broader context of them?
  - Was your comparison group appropriate? Was there a larger context that explains these results (e.g., decreased enrollments, lower student persistence statewide)?
  - Can you follow up with students/staff to learn more about their outcomes?
- How would you grade the entire process? In what ways could that grade be improved for next year?

Have the Right People at the Table

Who makes the student success decisions at your institution?

- Retention Committee
- Provost/President
- Student Success Leaders
- Vice Provost(s)
- Deans and Dept Chairs

And Make the Final Decision to Continue

Will Your Intervention Scale?

?

Questions to Decide if Scale is Possible

- Would small changes (e.g., the timing of your outreach) potentially yield even greater results?
- Can you achieve the same results with more students, and the same or a lower ratio of resources per student?
- Can you get a commitment to use portion of ROI to scale the initiative?
- Does the impact of the initiative outweigh any potential costs (e.g., staff time, resources, funding) of expanding further?

Have the Right People at the Table

Who makes the student success decisions at your institution?

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1 Focus on Planning and Evaluation

2 Step One: Analyze and Report on Results

3 Step Two: Iterate and Scale Impact

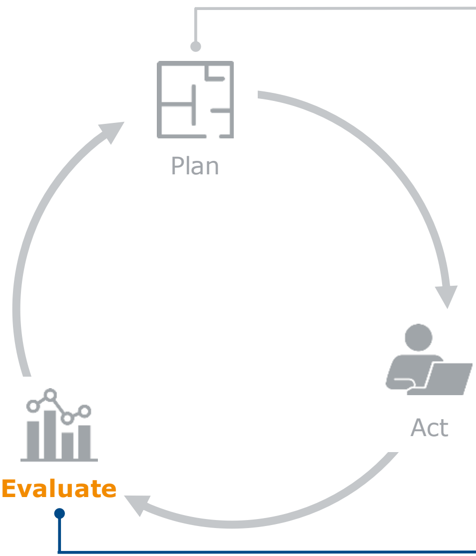
4 **Recap and Next Steps**

5 Q&A

Recap: Recommended Steps

Focus on These Steps Annually to Hardwire Evaluation Into Your Approach

Sustain Momentum Through Ongoing Evaluation



Plan

- Define objectives and metrics
- Design evaluation strategy

Watch Recording of Part One

Evaluate

- Analyze and report on results
- Iterate and scale impact

Focus for Today

Source: EAB interviews and analysis.

Recap: Core Concepts Shared Across Both Webinars

Keep These Steps in Mind As You Evaluate Your Initiatives

1 Define Objectives and Metrics

- Set goals in three layers – **goal, objective, and strategy**
- Define metric for each layer of goal – **ultimate metric, outcome metrics, and process metrics**
- Remember to understand your **theory of change**!

2 Design Evaluation Strategy

- Identify the evaluation **owner and timeline**
- Choose your **intervention and comparison populations**
- Control for **bias**
- Pick your **data source**, either using Navigate or external data
- **Snapshot** your data and **name** your lists or campaigns something easy to find later
- Plan for your **process metric check-ins**

3 Analyze and Report On Results

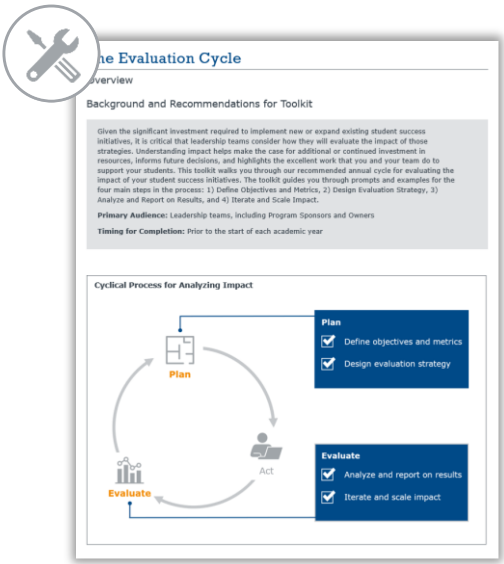
- Choose your **method of analysis** based on data available to you – Intervention Effectiveness, on your own, or campus experts
- Consider **when and when not** to use each of these methods
- Use our responsible **data interpretation guidelines**
- Consider the "four P's" for **reporting on successes**

4 Iterate and Scale Impact

- Define what went well and didn't go well to **inform future iterations**
- Determine if the initiative can be **scaled** and will continue to return greater impact

Helpful Toolkits

Quantifying the Impact of Your Student Success Initiatives Toolkit


he Evaluation Cycle

Overview

Background and Recommendations for Toolkit

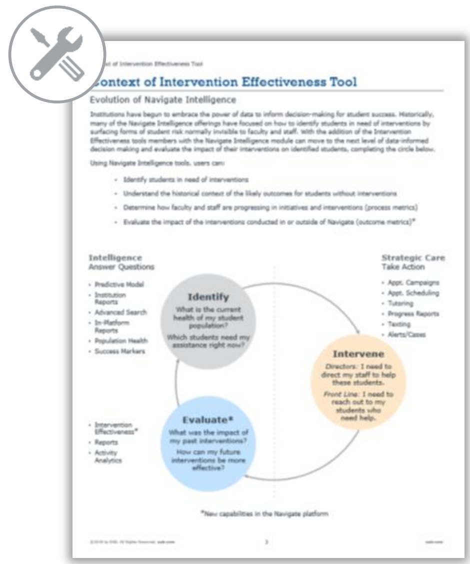
Given the significant investment required to implement new or expand existing student success initiatives, it is critical that leadership teams consider how they will evaluate the impact of those strategies. Understanding impact helps make the case for additional or continued investment in resources, 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 Objectives 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

Intervention Effectiveness Toolkit



Access both toolkits and webinar recordings here:
https://eab.app.box.com/s/usaq6m8tjfa2fq0q6bxgmnml2prkh23z

Help Center and Community Updates

Focusing on Improved Support, Resources, and Collaboration

The Navigate Help Center was been relaunched with a new organizational design and updated content, including:

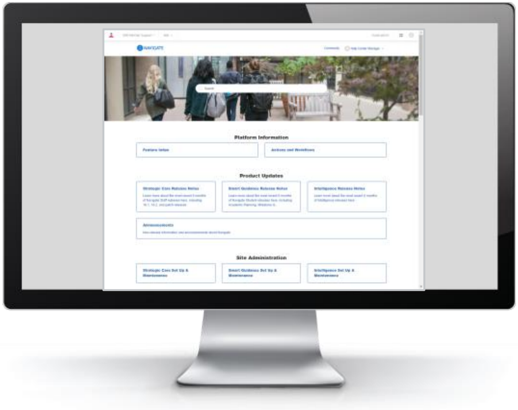
Platform Information – Information on specific features and common platform workflows across all three pillars of Navigate: Strategic Care, Smart Guidance and Intelligence.

Product Updates – Release notes for all three pillars from the previous six months and important cross-platform announcements.

Site Administration – Decision guidance, EAB recommendations and configuration information for all pillars of Navigate.

Resources – EAB Infographics, toolkits, training materials, student promotional materials and other resources to support your use of Navigate on campus.

The Community – New topics to facilitate engaging conversation, make connections, share best practices, and answer questions.



1. Focus on Planning and Evaluation
2. Step One: Analyze and Report on Results
3. Step Two: Iterate and Scale Impact
4. Recap and Next Steps
5. **Q&A**

Questions?

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- As you exit the webinar, you will be directed to an evaluation that will automatically load in your web browser.
- Please take a minute to provide your thoughts on the presentation.

THANK YOU!

Please note that the survey does not apply to webconferences viewed on demand.

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