



Transformation Tracks

Assess and Enhance Your Student Success Strategy with
EAB's Maturity Curve for Starfish Partners

Thank you for joining! We will get started shortly!

Student Success Collaborative

Zoom Webinar Features

The screenshot shows a Zoom Webinar interface. At the top, the EAB logo is displayed. The main content area features the text "EAB Virtual Session 2020" on a dark blue background with a geometric pattern. Below this, a menu is open for the "Closed Caption" feature, showing options: "Show Subtitle", "View Full Transcript", and "Subtitle Settings...". Three callout boxes provide instructions: "Use the Chat feature to send messages to all panelists or everyone" points to the Chat icon; "Enable Closed Captions and Show Subtitle or View Full Transcript" points to the Closed Caption menu; and "Use the Q&A feature to ask questions" points to the Q&A icon. The bottom toolbar includes "Audio Settings", "Chat", "Closed Caption", "Q&A", and a red "Leave Meeting" button.

EAB

EAB Virtual Session 2020

Use the Chat feature to send messages to all panelists or everyone

Enable Closed Captions and Show Subtitle or View Full Transcript

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Chat

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Today's Speakers



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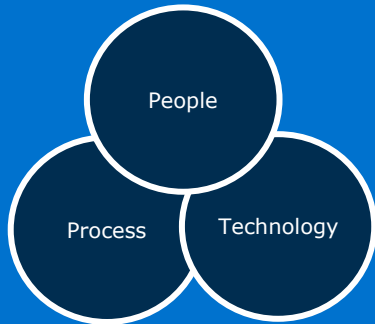
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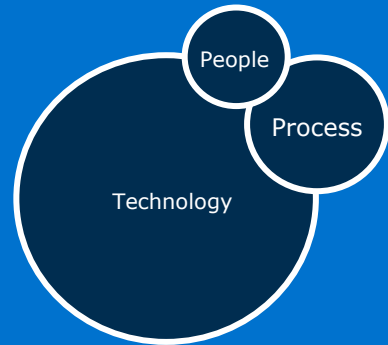
How Does Transformation Happen?

People + Process + Technology

How it Should Look



How it Frequently Looks



What We Heard From Our Partners



Supporting Your Efforts to Improve Student Success

- ▶ We need **specific strategies** to enhance our efforts to reach our student success goals
- ▶ We need clear levels to **assess our current state and chart a path forward** to improved technology utilization based on our priorities
- ▶ We need **concrete recommendations** on how to effectively execute those strategies and leverage technology capabilities



A Shared Goal Framework Helps Enable Success



Balance People, Process, and Technology

Comprehensive goal framework ensures equal emphasis across People, Process, and Technology



Extend Strategic Goals to Starfish

Many of our partners' strategic goals focus on improving student outcomes, so we've connected those to Starfish and the Student Success Collaborative (SSC)



More Efficient Networking

It is easier to connect with colleagues about levels of progress and areas for focus, if we use the same terminology

Transformation Tracks

A collection of student-centric strategies that leverage best-practice processes and technology in support of your institution's student success goals.

Introducing Transformation Tracks

Student-centric strategies that leverage Starfish capabilities and best-practices in support of your student success goals



Streamline Support Services and Optimize Resource Allocation

Student service offerings are built with the student experience in mind and are proactively communicated to students based on need, using student-friendly language within the technology to ensure student utilization



Identify and Intervene with Students in Need of Support

Data are used to identify cohorts of students in need of proactive outreach and support, and regularly updated to evaluate the effectiveness of interventions



Guide Students Through Onboarding, First Year, and Beyond

Populated checklists and plans with key action steps exist in Starfish across the full lifecycle, and the institution coordinates communication to focus populations and those students with greater need to ensure compliance with critical processes



Coordinate Communications across Multiple Channels

Messages coordinated across channels, with alignment in best-fit channel, and customized growth mindset messages to drive positive student action



Integrate Early Alerts and Case Management

Focus populations, common alert reasons, and corresponding intervention pathways identified using current and historical student data to create a coordinated care network comprised of advisors, faculty, and other support staff



Simplify Student Academic Planning

Students have access to user-friendly, dynamic academic planning tools, and advisors use those tools to keep students on track to a degree or intervene with students who are off track



Prepare for Student Interactions and Follow up on Next Steps

Advisors, faculty, and student services staff use the Starfish student profile data, predictive model, analytics, and notes to conduct high-quality interventions and provide next-step recommendations



Connect Students with Self-Service Tools and Resources

Students can resolve most transactional questions using self-service resources, and the institution proactively pushes resource information to students suited for self-service to reduce the volume of demand on student support staff

Streamline Support Services and Optimize Resource Allocation



Service offerings are built with the **student experience in mind**, leveraging student-friendly language within the technologies and communications that support the services.

Services are tailored to student need levels, with specific services proactively promoted to focused populations based on demonstrated need.

Institutional policies enforce standard data collection practices across units to allow for evaluation, with annual data quality checks.



Student service offerings are built with the student experience in mind and are proactively communicated to students based on need, using student-friendly language within the technology to ensure student utilization



Integrate Early Alerts and Case Management



The early alert and case management process **consistently aligns to strategic goals for student success**, using data to inform focus populations.

Clear and consistent **intervention pathways**, informed by data and institutional goals, are outlined and in use, leading to holistic collaboration across support office.

Assessment plan in place that ties back to process and outcome metrics, with a focus on student outcomes. Evaluation used to inform changes over time.



Focus populations, common alert reasons, and corresponding intervention pathways identified using current and historical student data to create a coordinated care network comprised of advisors, faculty, and other support staff.



▶ **Drake University** established workflows to enable coordination and collaboration

- 12 established workflows spanning from personal to grade concerns
- Clearly documented, publicized and regularly reviewed for effectiveness

Connect Students with Self-Service Tools and Resources



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Self-service tools are set up and **clearly shared students**. Populations which are not well suited for self-service are also identified and expectations are set accordingly.

Self-service tools, policies and processes are **reviewed annually to assess impact** and changing student cultures in order to meet students' needs. Old processes are retired as new, more effective strategies emerge.

Self-service strategy is managed by cross-functional teams to design a holistic approach. **Communication to students is clear** and allows for immediate action.



Students can resolve most transactional questions using self-service resources, and the institution proactively pushes resource information to students suited for self-service to reduce the volume of demand on student support staff.



Identify and Intervene with Students in Need of Support



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Historical data, current student behavior, and/or predictive data inform **populations of interest for interventions**, and impact of interventions is consistently reviewed and shared across campus stakeholders.

Interventions have **clear objectives and outcome metrics** to inflect changes in behavior and align with institutional goals. Intervention strategy aligns with institutional goals and student data.

Interventions are **centrally coordinated**, sequenced, and prioritized across units to avoid periods of over-communication and increase response likelihood.



Data are used to identify cohorts of students in need of proactive outreach and support, and regularly updated to evaluate the effectiveness of interventions



▶ **Columbus State Community College** intervention tactics respond to real concern for new students

- Work-study students needed support finding employment
- Success Plan was developed and shared with those students at start of term

Coordinate Communications Across Multiple Channels



The purposes of different communication channels are **clearly defined** and continuously evaluated with intentional policies, access levels, and content guidelines at an institutional level.

Communication schedules and content, including message templates, are centralized and **coordinated across units to reduce noise** and maximize penetration.

Communications **apply nudging and growth mindset principles** to message templates to encourage students to take the desired action.



Messages coordinated across channels, with alignment in best-fit channel, and customized growth mindset messages to drive positive student action



Prepare for Student Interactions and Follow-up on Next Steps



Interactions and summary report **data are analyzed on a regular basis to adjust** processes, student outreach, strategies and support offerings. Effectiveness of interactions is evaluated and acted on.

Holistic, proactive caseload management is established across the institution. Individual campus units coordinate to regularly review analytics and meeting reports for student risk.

Staff **track and follow-up** to support students in taking next steps that were recommended during interactions.



Advisors, faculty, and student services staff use the Starfish student profile data, predictive model, analytics, and notes to conduct high-quality interventions and provide next-step recommendations



Guide Students Through Onboarding, First Year and Beyond



Special populations are identified, based on their goals and data, tailored approaches to support them exist, and outcomes of interactions are assessed and measured regularly.

Key student milestones are prioritized across campus and a comprehensive calendar is developed for messaging and promotion to students. The calendar and plan are reviewed and assessed as goals change.

There is a **plan of support** for students who stumble through key milestones through interventions, coaching, remediation, and connecting to others on campus.



Populated checklists and plans with key action steps exist in Starfish across the full lifecycle, and the institution coordinates communication to focus populations and those students with greater need to ensure compliance with critical processes



Northeast Wisconsin Technical College maximizes feedback from Intake forms

- Thorough processes that coordinates reviewing responses and follow-up across offices
- Students with at least one referral cleared enrolled for following term at ~19% higher rate than if none cleared

Simplify Student Academic Planning



Re-enrollment processes are **regularly audited** to identify opportunities for removing or mitigating logistic and financial barriers to registration.

Student planning and registration **data is used to inform the re-evaluation and improvement** of academic plan templates and to streamline prerequisite and program requirement pathways.

Advisors view student plans prior to student meetings and provide **prescriptive guidance** around course selection and sequencing during the interaction.



Students have access to user-friendly, dynamic academic planning tools, and advisors use those tools to keep students on track to a degree or intervene with students who are off track



Poll: Select up to three responses

Based on your student success goals, **which of the Transformation Tracks stand out** as strategies for your institution to prioritize right now?

Streamline Support Services and Optimize Resource Allocation

Coordinate Communications Across Multiple Channels

Prepare for Student Interactions and Follow Up on Next Steps

Identify and Intervene with Students in Need of Support

Integrate Early Alerts and Case Management

Connect Students with Self-Service Tools and Resources

Guide Students through Onboarding, First Year, and Beyond

Simplify Student Academic Planning

Maturity Curve

Aligning transformation tracks to assessment and process metrics, intended outcomes, and your student success goals.



Starfish

Telling Your Student Success Story



1 Goals

2 Initiatives

3 Interventions

4 Workflows

What are Your Student Success Goals?

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Transformation Metrics

**Average Time
and Cost to
Degree**

**Retention,
Persistence, and
Graduation
Rates**

**Equity
Gaps in
Retention and
Graduation**

**Summer
Melt**

Outcome Metrics

Student Performance

- GPA or Academic Standing
- Avg grade, DFW rates
- Midterm to final grade changes

Student Progress

- Credits attempted, earned, and completion %
- Major changes

Enrollment

- Registration, re-enrollments
- Application yield
- Earlier registration, holds cleared

Other

- Applications to graduate
- Staff or student time savings and satisfaction

Process Metrics

Appt. Activity

- Total appts., appt. per student
- No-show or cancellation rates
- Summary reports filed

Interventions

- Students contacted
- Scheduled and completed appts
- Completed actions
- Increased use of support services

Case Management

- Progress Report response rates
- Alerts issued
- Cases opened and closed

Student Adoption

- Mobile app adoption and utilization
- Completed to-dos
- Appts scheduled by students

Maturity levels from
Absent (0) to
Transformative (4)

Transformation
Tracks Strategies

Transformation Tracks

Streamline Support
Services and Optimize
Resource Allocation

Coordinate
Communications Across
Multiple Channels

Prepare for Student
Interactions and
Follow-up on Next Steps

Identify and
Intervene with Students
in Need of Support

Integrate Early Alerts and
Case Management

Connect Students
with Self-Service
Tools and Resources

Guide Students Through
Onboarding, First Year,
and Beyond

Simplify Student
Academic Planning

Absent

Minimal use of
technology

Little to no
understanding of
current processes

Limited

Processes
implemented
inconsistently

Technology use
limited to one or a
few units

Little to no
evaluation of efforts

Expanded

Process changes
informed by best
practice, focused on
efficiencies

Expansion of
technology use across
most of campus,
inclusive of key
student support
services

Evaluation focused
only on process
metrics

Strategic

Objectives align with
institutional goals

Strategy informed
by historical and
current data trends

Process changes
informed by best
practice, focused on
student outcomes

Evaluation inclusive
of process and
outcome metrics

Transformative

Consistent and
ongoing evaluation of
impact informs future
iterations

Focus shifts to
increasing impact and
scale of people,
processes, and
technology

Changes embedded
into daily workflow
and team culture

Level 0

Level 1

Level 2

Level 3

Level 4

Each track filled in
as your institution
assesses your
current state and
levels-up

Identify and Intervene with Students in Need of Support

Maturity levels describe tech utilization

Absent

Level 0

Interventions are mostly reactive, seldom proactive.

Minimal use of technology for managing interventions.

Strategies by level, specific to each track

Relevant Starfish features

Limited

Level 1

Student interventions are planned and executed by individuals or individual units lacking cross-campus coordination.

There is little to no documentation of in-progress or completed student interventions.

Expanded

Level 2

Most in-progress and completed interventions are documented across campus in an intervention calendar.

Interventions take place across multiple venues, including Text Messages and Email.

Best practices for launching and tracking interventions are standardized and shared across units to allow for a consistent student experience.

Process metrics are tracked and inflected to increase effectiveness of interventions.

Strategic

Level 3

A breadth of data across systems on historical trends, current student behavior, and/or predictive data inform populations of interest for interventions.

Interventions have clear objectives and outcome metrics to inflect changes in behavior and align with institutional goals.

Interventions are centrally coordinated, sequenced, and prioritized across units to avoid periods of over-communication and increase response likelihood.

Action plans ensure follow-through beyond initial outreach.

Transformative

Level 4

Impact of interventions is consistently reviewed (through macros or other reporting)

Intervention outcomes are reviewed periodically to find opportunities for iteration and improvement.

Cross-campus intervention outcomes are shared broadly to showcase impact of student support services on student outcomes.

Intervention strategy continues to align towards institutional goals and student data, with individual units setting their own goals to directly contribute to the institution-level goals.

Suggestions for process and outcome metrics to track progress, specific to each track

Features to Prioritize:

- Retention Scores
- Search and Filter Features
- Attribute-based Filters
- Caseload Lists
- Cohorts
- Organizations
- Intake Survey

Suggested Metrics

Process

- Total students contacted
- Total scheduled, completed appointments
- Total completed actions

- Increased use of support service resources
- Total messages sent
- Reduction in message length or jargon

Outcome

- Improvements in GPA or Academic Standing
- Increased credits attempted, earned, completion %
- Earlier major declarations, changes

- Increase in registration, re-enrollments
- Earlier registration
- Increase in cleared holds
- Increase in graduation applications

Poll

When it comes to **Identifying and Intervening with Students in Need of Support**, where would you rate your institution along the maturity curve?

Level 0: Absent

Level 1: Limited

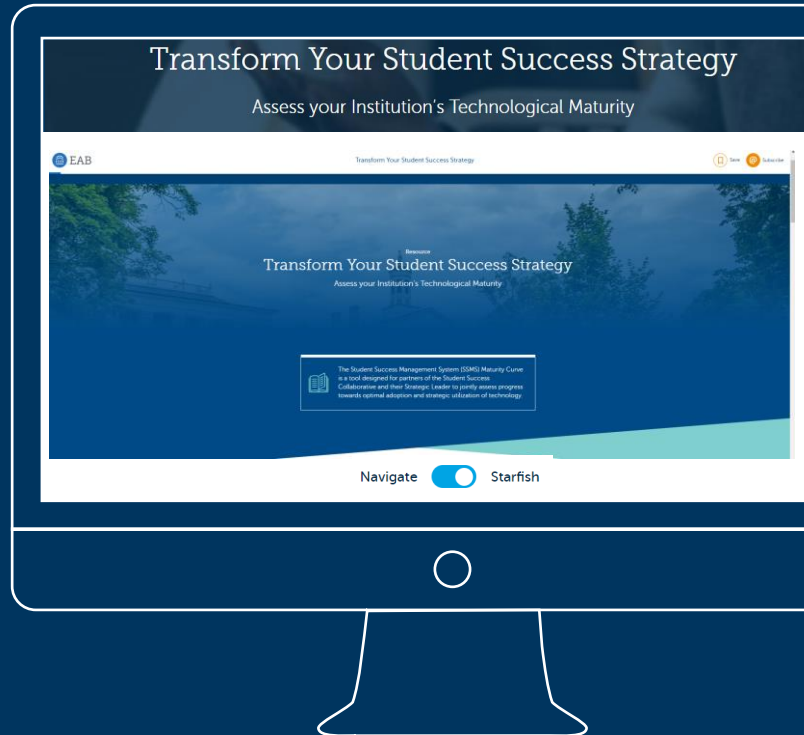
Level 2: Expanded

Level 3: Strategic

Level 4: Transformative

Take the Online Assessment

- ▶ Rate your maturity level across the eight Transformation Track strategies through a brief online survey
- ▶ Toggle to the Starfish version on the webpage
- ▶ Look for your Strategic Leader to follow up on your results and to incorporate recommended actions to support and deepen your work



Getting the Most out of the Maturity Curve

1

Use your student success goals to set process and outcome metrics



2

Assess your current state at the institutional level



3

Align recommendations to action steps in your service plan



4

Evaluate progress and priorities annually and recalibrate accordingly



Telling the Story

Leveraging transformation tracks and the maturity curve to align with and/or reinvigorate planning efforts and report to stakeholders.

Highlighting Progress for Stakeholders

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Transformation Tracks Give the “Why” Behind Student Success Activities



Integrate Early Alerts and Case Management

- Progress surveys yield over **5,000 flags** per year that Student Success professionals can use to inform proactive outreach
- Existing Data shows an **11% increased persistence rate** (Fall to Spring) for students who met with an advisor after an Early Alert



Prepare for Student Interactions and Follow-up

- **12 units using Starfish for Referrals** and inter-office communication enables holistic care
- Seamless student experiences support next steps and ease of tracking



Identify and Intervene with Students

- Data-informed workflows identified students in need of targeted support
- Proactive outreach resulted in **over 4,000 appointments from outreach campaigns**

Transform by Telling The Story

EAB University

Iteration and Expansion



- Continue to expand Progress Survey early alerts effort
- Establish Financial Aid ownership in Starfish



- Continue to support advisor & staff utilization of key workflow tools (appointments, communication)
- Involve Student Life in Starfish



- Refine new student promotion strategy for digital orientation and student-generated appointments
- Avenues for returning student engagement

Areas of Strength to Sustain

- Maintain faculty engagement
- Continue "Best in Class" student adoption techniques for long term student self-sufficiency

Set Goals



Revisit your Student Success goals (Strategic Plan, task forces, etc.) alongside Transformation Tracks.

Use support of your Strategic Leader to guide your leadership team through goal-setting exercise using the process/outcomes pyramid.

Assess Current State



Take Maturity Curve survey together as a team or separately.

Discuss ratings as a group. Are you aligned? Why or why not?

Ensure Right Path



Work with your Strategic Leader on a plan to further align your actionable Starfish optimizations to your strategic goals.

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Transformation Tracks

Student-centric strategies that leverage Starfish capabilities and best-practices in support of your student success goals



Streamline Support Services and Optimize Resource Allocation

Student service offerings are built with the student experience in mind and are proactively communicated to students based on need, using student-friendly language within the technology to ensure student utilization



Identify and Intervene with Students in Need of Support

Data are used to identify cohorts of students in need of proactive outreach and support, and regularly updated to evaluate the effectiveness of interventions



Guide Students Through Onboarding, First Year, and Beyond

Populated checklists and plans with key action steps exist in Starfish across the full lifecycle, and the institution coordinates communication to focus populations and those students with greater need to ensure compliance with critical processes



Coordinate Communications across Multiple Channels

Messages coordinated across channels, with alignment in best-fit channel, and customized growth mindset messages to drive positive student action



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Focus populations, common alert reasons, and corresponding intervention pathways identified using current and historical student data to create a coordinated care network comprised of advisors, faculty, and other support staff



Simplify Student Academic Planning

Students have access to user-friendly, dynamic academic planning tools, and advisors use those tools to keep students on track to a degree or intervene with students who are off track



Prepare for Student Interactions and Follow up on Next Steps

Advisors, faculty, and student services staff use the Starfish student profile data, predictive model, analytics, and notes to conduct high-quality interventions and provide next-step recommendations



Connect Students with Self-Service Tools and Resources

Students can resolve most transactional questions using self-service resources, and the institution proactively pushes resource information to students suited for self-service to reduce the volume of demand on student support staff



Thank you!

Connect with EAB



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Transformation Tracks

Full descriptions of the eight student-centered strategies and descriptive levels that make up EAB's SSMS Maturity Curve



Introducing Transformation Tracks

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Student-centric strategies that leverage Starfish capabilities and best-practices in support of your student success goals



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Streamline Support Services and Optimize Resource Allocation



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Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
<p>Student support services mostly rely on manual processes (e.g., pencil and paper) and/or disparate point solutions.</p>	<p>Individual units leverage technology-enabled appointment scheduling and check-ins, but the student experience is inconsistent across units and primarily focused on professional advising.</p> <p>Student-initiated scheduling is available in some units but not consistent across institution.</p> <p>There are not policies regarding expectations for staff and faculty involvement in providing support services, managing those services, or collecting data on those services.</p>	<p>Student-initiated scheduling is available across most of campus, and students know how to access and use these services.</p> <p>Students are checked in for their appointments consistently and efficiently.</p> <p>There are clear policies across units regarding expectations around staff and faculty involvement in providing student support services and managing those services.</p> <p>Technologies used to support student service offerings are consolidated to avoid confusion and inefficiencies. If multiple technologies are being used, there are clear expectations and purposes behind each.</p>	<p>Service offerings are built with the student experience in mind, leveraging student-friendly language within the technologies and communications that support the services.</p> <p>Services are tailored to student need levels, with specific services proactively promoted to focused populations based on demonstrated need.</p> <p>Process data is entered and tracked in the platform and used to inform service offerings.</p>	<p>Institutional policies enforce standard data collection practices across units to allow for evaluation, with annual data quality checks.</p> <p>Support services are optimized to best support the student experience using data to determine ideal service offerings, timing, locations, etc. and resources are allocated accordingly.</p>

Features to Prioritize:

- Student Folder
- Success Network
- Retention Scores
- Reports
- Appointments
- Meeting Notes
- Tracking Item Notes
- Message Templates
- Filtering Options
- Cohorts
- Message Snippets



Suggested Metrics

Process

- Service utilization/total appointments
- Touchpoints per student
- No-show/cancellation rates
- Meeting reports filed
- % appointments scheduled by students

Outcome

- Cost savings through sunset of duplicative or legacy systems
- Staff and student time savings
- Student service satisfaction
- Staff job satisfaction

Coordinate Communications Across Multiple Channels



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Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Students receive ad hoc communications from staff, limited to email.	<p>Select units have access to email, text and in-platform communications to students (e.g. to-do's in Success Plan).</p> <p>Students receive communications via multiple channels without coordination between units to control for content, repetition, formatting, or sequencing.</p> <p>There are not standard policies across units regarding who contacts students, when they are contacted, or how they are contacted.</p>	<p>All units have access to email, text, and in-platform communications to students.</p> <p>Students receive communications via multiple channels, and coordination to control for content, repetition, formatting, or sequencing only occurs within the units themselves.</p> <p>Students receive automated messages from systems that compliment, not contradict, other forms of communication being sent.</p> <p>Communications deploy email and text best practices to avoid jargon and increase student engagement in the content, with an emphasis on growth mindset language in message templates.</p>	<p>The purposes of different communication channels are clearly defined with intentional policies, access levels, and content guidelines at an institutional level.</p> <p>Communication schedules and content, including message templates, are centralized and coordinated across units to reduce noise and maximize penetration.</p> <p>Communications apply nudging and growth mindset principles to message templates to encourage students to take the desired action and inflect behaviors.</p>	Communication content, channels, and delivery systems are continuously evaluated and improved using data to maximize penetration.

Features to Prioritize:

- Message Templates for email and texting
- Texting configuration and auto-opt in
- Snippets
- Advanced Fields
- Direct Links



Suggested Metrics

Process

- Student response rates
- Reduction in total messages being sent to students

- Reduction in message length or jargon
- Communication channel utilization rates

Outcome

- Student behavioral changes as result of communications
- Staff time savings
- Improvements in staff job satisfaction
- Student time savings
- Improvement in student satisfaction

Prepare for Student Interactions and Follow-Up on Next Steps



Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
<p>Staff do little to no preparation before appointments with students and do not capture notes or summaries of interactions in easy to access systems.</p>	<p>Faculty and staff meeting with students utilize student records and information such as the student profile to quickly prepare for meetings.</p> <p>Meeting notes and reports are submitted, but clear and consistent expectations and regulation are not in place across all parts of the institution.</p>	<p>Clear expectations and processes are articulated and followed for all student interactions and follow-up to those interactions to ensure all FERPA and student privacy concerns are met.</p> <p>Faculty and staff use Starfish to proactively inform conversations, diving deeper into student profile, retention score, GPA and credit trends, completion of key milestones and degree planning.</p> <p>Faculty and staff are proactive in their meeting follow-up to support students, connect them to resources or alert other services on campus to intervene.</p>	<p>Interactions and summary report data are analyzed on a regular basis to adjust processes, student outreach, strategies and support offerings.</p> <p>Staff track and follow-up to support students in taking next steps that were recommended during interactions.</p> <p>Individual campus units coordinate to regularly review analytics and meeting reports for student risk.</p> <p>Meeting schedules and office hours are structured to support staff in having adequate preparation for interactions.</p>	<p>Holistic proactive caseload management is established across the institution.</p> <p>The effectiveness of these interactions are being evaluated on a regular basis and adjustments are being made to workflows, trainings and support.</p> <p>Evaluate workload and quality of interactions to assess improvement over time.</p>

Features to Prioritize:

- Student Folder
- Appointments
- Meeting Notes/Outcomes
- Tracking Item Notes
- Referrals
- Search and Filter Features
- Retention Scores



Suggested Metrics

Process

- Number of appointments scheduled/attended
- Appointment lengths
- Outcomes entered
- Speednotes entered
- Touchpoints per student in caseload

Outcome

- Student satisfaction with interactions
- Number of milestones met/anticipated graduation date
- % of caseload with improved or maintained GPA
- % of caseload attempting and earning full credit load
- % of caseload that registered and persisted to next term

Identify and Intervene with Students in Need of Support



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Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
<p>Interventions are mostly reactive, seldom proactive.</p> <p>Minimal use of technology for managing interventions.</p>	<p>Student interventions are planned and executed by individuals or individual units lacking cross-campus coordination.</p> <p>There is little to no documentation of in-progress or completed student interventions.</p>	<p>Most in-progress and completed interventions are documented across campus in an intervention calendar.</p> <p>Interventions take place across multiple venues, including Text Messages and Email.</p> <p>Best practices for launching and tracking interventions are standardized and shared across units to allow for a consistent student experience.</p> <p>Process metrics are tracked and inflected to increase effectiveness of interventions.</p>	<p>A breadth of data across systems on historical trends, current student behavior, and/or predictive data inform populations of interest for interventions.</p> <p>Interventions have clear objectives and outcome metrics to inflect changes in behavior and align with institutional goals.</p> <p>Interventions are centrally coordinated, sequenced, and prioritized across units to avoid periods of over-communication and increase response likelihood.</p> <p>Action plans ensure follow-through beyond initial outreach.</p>	<p>Impact of interventions is consistently reviewed (through macros or other reporting)</p> <p>Intervention outcomes are reviewed periodically to find opportunities for iteration and improvement.</p> <p>Cross-campus intervention outcomes are shared broadly to showcase impact of student support services on student outcomes.</p> <p>Intervention strategy continues to align towards institutional goals and student data, with individual units setting their own goals to directly contribute to the institution-level goals.</p>

Features to Prioritize:

- Retention Scores
- Search and Filter Features
- Attribute-based Filters
- Caseload Lists
- Cohorts
- Organizations
- Intake Survey

Suggested Metrics

Process

- Total students contacted
- Total scheduled, completed appointments
- Total completed actions

- Increased use of support service resources
- Total messages sent
- Reduction in message length or jargon

Outcome

- Improvements in GPA or Academic Standing
- Increased credits attempted, earned, completion %
- Earlier major declarations, changes
- Increase in registration, re-enrollments
- Earlier registration
- Increase in cleared holds
- Increase in graduation applications

Integrate Early Alerts and Case Management

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
<p>Few or zero early alerts being used across campus units to indicate students in need of support.</p> <p>Case management system not in use to coordinate student support across various campus units.</p>	<p>Tracking items in use by some campus units, but not all, and not consistently.</p> <p>Connection to specific support services not happening directly from tracking items and coordination is difficult to achieve.</p> <p>No protocol for use of referrals or flags in place or official triage process.</p> <p>Faculty buy-in for submitting early alerts or providing feedback via progress survey is spotty, with lower than ideal response rates.</p>	<p>Established tracking items based on institutional knowledge, but not aligned to strategic goals or areas of greatest need.</p> <p>Triage system established for assigning interventions to support offices, using case management.</p> <p>Strong staff and faculty buy-in for submitting and responding to early alerts.</p> <p>Communication and collection timeline intentionally established and shared with key stakeholders.</p> <p>Faculty response rates are monitored and tracked, providing nudges as needed.</p>	<p>Focus populations, tracking items, and intervention pathways informed by historical and current student data, as well as institutional student success goals.</p> <p>Clear and consistent intervention pathways outlined and in use, leading to holistic collaboration across support office.</p> <p>The feedback loop is closed with those issuing the flags, ensuring ongoing buy-in and high response rates.</p> <p>Basic assessment plan outlined, focused mostly on process metrics and some outcomes metrics.</p>	<p>The early alert and case management process consistently aligns to strategic goals for student success, using data to inform focus populations.</p> <p>Assessment plan in place that ties back to both process and outcome metrics, with a focus on student outcomes.</p> <p>Evaluation used to inform changes to process in subsequent terms.</p> <p>Successes of system are shared more broadly across campus to ensure ongoing buy-in and focus to the efforts.</p>

Features to Prioritize:

- Caseload-based relationships
- Tracking Items
- Message Templates
- Meeting and Tracking Item Notes
- Closure Reasons

Suggested Metrics

Process

- Students in progress surveys
- Tracking items issued
- Progress survey response rate

- % of tracking items successfully closed
- Increase in service utilization (e.g., tutoring)

Outcome

- Changes in GPA/Academic Standing
- Improvement in final grades
- Improvement from midterm to final grades
- Decrease in DFW rates
- % students registered for next term
- Increase in reported course attendance

Connect Students with Self-Service Tools and Resources



Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
<p>Little to no self-service tools or processes are being used by the institution.</p> <p>Staff are required to inform students of most information and complete almost all actions.</p>	<p>Institutions have multiple applications for students to access information but lack coordination and clarity on their use and purpose.</p> <p>Institutions have a central landing page for information on a website and/or a central service gateway for students which contain comprehensive listings of services, web-based forms and/or FAQs.</p> <p>Students are reliant on staff for basic transactions.</p>	<p>Institutions have clearly defined and agreed to value propositions for all apps and self-service tools (like Starfish) on campus and are actively promoted to students accordingly.</p> <p>Students can resolve most common problems on their own through checklists, actionable to-do's or promoted resources.</p> <p>Student appointment scheduling is utilized across all major support offices on campus.</p> <p>Students know how to ask for help (using Raise your hand functionality or other workflows).</p>	<p>Populations that are better suited for more advanced self-service tools are identified and processes are put in place to support them. Populations which are not well suited for self service are also strategically identified and expectations are set accordingly.</p> <p>To-do's, reports and messages sent to students include clear next steps and tools to allow students to take immediate action.</p> <p>Self-service strategy is managed by cross functional teams from various support office to design a holistic approach.</p>	<p>Use of staff time is assessed and reallocated to service design and holistic advising.</p> <p>Processes replaced by self-service tools are sunset in order to drive student use.</p> <p>Self-service tools, policies and processes are reviewed annually to assess impact and changing student cultures in order to meet students' needs.</p>

Features to Prioritize:

- Success Network
- Appointment Scheduling
- To-Dos
- Referrals
- Intake Form
- Raise Your Hand
- Kiosks



Suggested Metrics

Process

- Starfish adoption and utilization
- Completed to-dos
- % appointments scheduled by students
- % of flags raised by students

Outcome

- Student time savings
- Staff time savings
- Improvements in staff job satisfaction
- Improvement in student satisfaction
- In-person interactions focus on relationships and goal setting, not transactions
- Student behavioral changes as result of process changes

Guide Students Through Onboarding, First Year, and Beyond



Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
<p>Onboarding information is dispersed amongst multiple websites and communications.</p> <p>Information to students is owned by individual offices and not coordinated.</p>	<p>Institutions have an onboarding checklist which may be populated into Starfish with dates and steps in order to successfully start at the institution.</p> <p>Some core dates, annual to-dos, and central resources are defined and promoted to all populations on campus.</p>	<p>Institutions leverage Intake form to obtain information about students they would not otherwise have such as parenting needs or veteran status in order to better identify the needs of their students on campus.</p> <p>Key information for success is carefully crafted to be in student friendly and accessible language, avoiding jargon.</p> <p>All core dates, tasks, and all campus resources are defined and promoted to students in a consistent and comprehensive manner.</p>	<p>Institutions identify special populations, based on their strategic goals, and develop tailored approaches to support those populations' needs through technology and support services on campus.</p> <p>Structures exist for continuous review and update of processes and services for all students.</p> <p>Key student milestones are prioritized across campus and a comprehensive calendar is developed for messaging and promotion to students when information is most needed.</p> <p>There is a full plan of support for students who stumble through key milestones through interventions, coaching, remediation, and connecting to other students on campus.</p>	<p>Assess student outcomes like persistence and graduation rates based on interventions through analytics.</p> <p>Student support and Starfish strategies change as institution's goals change and students' characteristics change.</p> <p>Provide a single point of contact for students to better navigate the complexities of college.</p>

Features to Prioritize:

- Student Folder
- Success Network
- Success Plans
- Intake Form
- Peer-Based Support
- Roles/Privilege Set
- Attributes



Suggested Metrics

Process

- Completed to-dos
- Increase in campus resource utilization
- % utilization in first semester
- % of submission of intake form

- % of increase in FAFSAs refilled

Outcome

- Increase in proportion of students self-identifying as engaged
- Increase in application yield
- Increase in graduation applications

Simplify Student Academic Planning



Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Students plan course loads and register for classes without proactive intervention or academic advising.	<p>Degree or registration requirements are provided to students without customization to specific student needs; academic plans are static guides of idealized course sequences.</p> <p>Students have access to academic planning and registration tools.</p> <p>Interactions between students and advisors related to academic planning or registration are transactional in nature.</p>	<p>Students easily access resources related to degree requirements.</p> <p>There are clear policies in place for students around expectations for the use of academic planning tools for course scheduling.</p> <p>There are clear policies in place for advisors around their role in assisting students with academic planning and registration; advisors view available student plans prior to or during student meetings and provide prescriptive guidance around course selection and sequencing during the interaction.</p>	<p>Re-enrollment processes are audited to identify opportunities for removing or mitigating logistic and financial barriers to registration.</p> <p>There is a system in place for issuing alerts for students who are off-track in their academic planning and following through on case resolution.</p> <p>Specific student populations are identified for proactive academic planning and registration-based advising using a combination of historical data trends and active student data.</p> <p>Academic planning tools provide customization opportunities to support unique student needs.</p>	<p>Analytics are used to identify student preferences around advising availability and information dissemination, and the data is used to revise and improve offerings to meet demand.</p> <p>Student planning and registration data is used to inform the re-evaluation and improvement of academic plan templates and to streamline prerequisite and program requirement pathways.</p> <p>Administrators use student feedback to surface the most problematic policies and processes.</p> <p>Administrators review existing registration policies on an ongoing basis, considering their cumulative impact on student success, and revise policies that create unintentional roadblocks to retention and graduation.</p>

Features to Prioritize:

- Degree Planner
- Attributes
- Tracking Items
- Message Templates
- Cohorts
- Success Plans



Suggested Metrics

Process

- Students with completed programs or who are close to completion
- Students who have not completed milestone courses
- Course demand and forecasting

Outcome

- Staff time savings
- Completion of milestone courses
- Increase in credits attempted, earned, completion %
- Increase in registration, re-enrollments
- Earlier registration, holds cleared
- Increase in graduation applications
- Decrease in time to degree