January 29, 2018

Lisa Blazer
Senior Associate Vice President for Student Affairs
The University of Texas at San Antonio
One UTSA Circle
San Antonio, TX 78249

Dear Dr. Blazer,

I am sorry you missed my recent visit to the University of Texas at San Antonio on January 24-25, 2017. I hope you are feeling better. The working groups did a good job on the situation analyses, framing critical questions for the institution, and suggesting several SEP opportunities. The UTSA SEP process is well-positioned as we move into strategy ideation and action planning.

Our purpose for this visit was to review the drafts of the situation analyses prepared by the working groups, to discuss additional data needs, to begin the identification of potential SEP strategies, and to introduce the action planning process and associated planning tools.

We have scheduled the fourth SEP visit for March 6-7, with visits five and six following on April 3-4 and April 25-26 respectively. During the March visit, we plan to vet the first wave of action plan drafts, discuss the ongoing strategy ideation process, and plan for the review of subsequent action plan drafts during the early April visit. This timeline is dependent on how quickly the leadership can determine how the strategy possibilities identified by the Task Force fit into the overall institutional planning effort.

I enjoyed my time on campus and the opportunity to collaborate with the faculty and staff at UTSA. If you have questions about this report, please give me a call (859-351-8688) or send me an email (Brad.Goan@ruffalonl.com).

Sincerely,

Brad Goan
Executive Consultant

BG/cvc

c: Taylor Eighmy, president, The University of Texas at San Antonio
Can Saygin, faculty advisor to the president for strategic initiatives, The University of Texas at San Antonio
Elvira Jacquez, executive director of operations, Office of the President, The University of Texas at San Antonio
Lew Sanborne, vice president, Ruffalo Noel Levitz

Goals and Schedule for SEP Visit Three

Goals

- Review drafts of the situation analyses from each working group.
- Identify potential strategies suggested by each situation analysis.
- Identify additional data needs.
- Identify strategies for action plan development.
- Introduce the action plan process and tools.
- Prepare for the next visit.

Schedule

Wednesday, January 24

Task Force and working group discussions of situation analyses

9:00 - 10:15 a.m.	Student Success
10:15 – 11:30 a.m.	Undergraduate Academic Programs
11:30 a.m. – 12:45 p.m.	Graduate Education
12:45 – 2:00 p.m.	Finance and Financial Aid
2:00 – 3:15 p.m.	Recruitment and Marketing

Thursday, January 25

9:00 a.m. – 12:00 p.m.	Strategic Enrollment Task Force: Potential strategy review; identification of high-priority strategies for development; action planning fundamentals, processes, and tools

Visit Activities

Review of Situation Analyses

As was expected, the working groups took slightly different approaches to the task, and each has some opportunities to strengthen the analysis, but these documents provide a solid foundation for launching into the strategy ideation phase of the SEP process. What follows is a brief summary of the situation analysis in each focus area, an overview of Thursday's discussions, and some recommendations to strengthen the exploration, analysis, and/or existing practice.

Student Success

In its situation analysis, the student success group stresses the importance of intentionality, collaboration and communication, proactivity and flexibility, and attention to the specific needs of particular populations. The group acknowledges that UTSA has made considerable progress in student retention and graduation in recent years but that opportunities exist for continued improvements. The document explores mentorship programs, the AIS pathways course, academic support through the Tomás Rivera Center and the Writing Center, student success technologies, faculty engagement, the transfer student experience, math DFW rates, the lack of coordination in multi-section courses, funding for student success initiatives, and the overall well-being of UTSA students. The group also provides a number of recommendations for improving the current situation or for pursuing opportunities. ASAP redesign and improved course management and scheduling were at the top of the list. The Task Force's discussion largely centered on those two priorities as well as ways faculty can more effectively engage in student success. The group members raised two important points at the start of the Task Force conversation. They noted that faculty and staff must understand and "own" their individual roles in student success and that student success is about students, not about processes or policies.

I recommend the group take the following steps and/or address the following questions to strengthen the exploration, analysis, and/or existing practice.

- Include specific data on mentorship activities. How many mentors? How are we tracking the success of this program?
- Include specific data on F2GG and the Roadrunner Transition experience? How many students participate and what impact do those programs have on retention, persistence, graduation, and academic performance?
- Do we have usage data for the Tomás Rivera Center and the Writing Center, and what do the data tell us about the impact of those services on student retention, persistence, graduation, and academic performance?
- Do the data suggest any patterns in our non-returners who are in good standing?
- Flesh out the transfer retention data a bit more. While the overall retention rate is about 80%, what does that look like for each of the past few years? Are there differences in retention of students who transfer from community colleges vs. those who come from four-year institutions? Do we see any patterns in the transfer retention data that might help us think about strategic interventions?
- Consider how Ad Astra or a similar tool might help solve the course management concerns raised here.
- In consideration of DFW rates, have you examined student-level data in addition to course-level data? Have you analyzed DFW patterns in gateway courses outside of math? Are there any particular patterns in the students who tend to drop or earn poor grades?
- What data do we currently use to inform course planning? Who uses those data, and where does course planning decision-making reside?
- When we look at the general retention, persistence, and graduation picture at UTSA, do any patterns emerge? An analysis that goes deeper than the rates themselves might be helpful in pointing to the need for strategic responses. A couple of times in the document, you reference certain populations of students and specific interventions that UTSA does or could employ, but you never cite any student success data for those populations of students? Another important data point would be the retention, persistence, and graduation of students in different socio-economic bands.

Undergraduate Academic Programs

In its situation analysis, the undergraduate academic programs group examines nine themes – academic degree programs and curriculum content, course and program bottlenecks, course and program capacity, course delivery systems, the downtown campus, misaligned processes and barriers for students, new program opportunities, partnerships, and systems management and technology. The strengths of student diversity and the quality of the faculty cut across all of the themes while the weaknesses and threats of silos, space constraints, and poor faculty/staff retention are prevalent in all areas as well. The group also identifies several potential strategies to improve the current situation or to capitalize on opportunities across these areas. Of significant importance to this group are data governance and the effective use of a CRM system. These areas were common elements in the Task Force's discussion as were the lack of coordination in curricular changes, course management and scheduling, heritage language programs, the expansion of online courses outside of fully online programs, the placement process, and the need to improve communication between advisors and faculty members.

I recommend the group take the following steps and/or address the following questions to strengthen the exploration, analysis, and/or existing practice.

- What data exist on faculty and staff retention? Do we see any trends or patterns in that data?
- The Task Force had some conversation about heritage language courses and programs. This merits further exploration and discussion as an opportunity for UTSA to create some distinctiveness in the marketplace and to more effectively serve a growing population of Hispanic students.
- On page 3, there is a discussion of co-curricular transcripts. What models exist for doing this well? What institutions have figured this out, and what can we learn from them?
- Continue to explore a more robust experiential education program. I especially like the idea of connecting second language or heritage language courses and programs to experiential education.
- How does UTSA's balance of T/TT and NTT faculty compare to its peers?
- The waitlist information is provided on page 8 as evidence of the need for more online courses in the summer. Understanding the same data for fall and spring terms will help us flesh out not only the potential online needs but the larger course and program bottlenecks that exist. Especially important is our understanding of the enrollment patterns for those on course waitlists. Did they ultimately get in the course, did they take a different course (and did it satisfy the same or different core or major requirement), or did they not enroll in an alternative course at all?
- Who governs hybrid course development on campus? Are these true hybrid courses or simply flipped classrooms? Who does the instructional design? Are the hybrid instructors well-versed in the appropriate pedagogy?
- Do we have any data on student performance in online and hybrid courses? How does performance in those courses compare with the same course in a traditional seated environment? Do retention, persistence, graduation, and academic performance patterns for student taking the majority of their courses in online and hybrid modalities differ from those in primarily seated courses?
- UTSA needs to provide multiple options for satisfying the university core curriculum at the Downtown Campus.
- What data do we currently use to inform course planning? Who uses these data, and where does course planning decision-making reside?

Graduate Education

The graduate education working group organized its situation analysis around the following themes: demographics, student recruitment, student success, and degree completion. They highlighted the need for better infrastructure and collaboration across the colleges to improve the graduate student experience, including a cohesive university-wide graduate student recruitment and retention plan. Much of the discussion in the Task Force centered on the rising threat from Texas A&M San Antonio to UTSA's graduate programs (especially in education), the need for online program expansion and a clear online strategy at the graduate level, time to degree completion, the underutilization of the VIP nomination process, the absence of a general UTSA graduate brand, and inconsistency in brand management and marketing across the colleges.

I recommend the group take the following steps and/or address the following questions to strengthen the exploration, analysis, and/or existing practice.

- The analysis notes on page 2 that there is an "opportunity to change the culture of UTSA faculty to more readily embrace and desire greater numbers of non-majority graduate students and faculty." What is the evidence for that sentiment and how do we leverage that opportunity?
- Which particular graduate programs are threatened by the institutions noted as competitive threats on page 2?
- What work is ongoing to identify the areas of strength and program capacity that align with *60x30TX* targets (referenced on page 3)?
- Do graduate programs have specific enrollment goals?
- Consider the implementation of incentives for departments to create program-level enrollment and marketing plans that align with institutional goals.
- How can we maximize the use of the VIP nomination program?
- Consider how UTSA can leverage its HSI designation to create graduate recruitment pipelines.
- Consider how to bring greater coherence and consistency to the graduate admissions process while still vesting decision-making authority in the programs.
- Continue to pursue the question on page 7 – "Are faculty advisors mentoring and engaging their graduate students…If so, how?"
- Do we have usage data for the Graduate Student Development Center? What resources are students using most? Do we see any patterns in the usage that might point to other meaningful initiatives?
- The analysis includes college-specific enrollment but outlining program-specific enrollment, at least for the largest graduate programs, may reveal important enrollment patterns for analysis.
- What graduate programs at UTSA are particularly distinctive?
- Some more analysis on graduate program capacity would be helpful? What programs have capacity gaps and what programs are at or near capacity?

Finance and Financial Aid

The finance and financial aid working group framed its situation analysis around five themes: strategically awarding financial aid, student employment, communication and marketing of aid opportunities and processes, infrastructure and processes, and financial literacy. The group offered concrete recommendations for each area. The Task Force's discussions centered on scholarship management processes, the use of predictive analytics and econometric modeling to improve aid leveraging, graduate student financial aid procedures, simplification of payment deadlines, and the opportunity to connect work-study to students' professional development.

I recommend the group take the following steps and/or address the following questions to strengthen the exploration, analysis, and/or existing practice.

- Evaluate the efficacy of the UT system model to meet UTSA's various leveraging needs.

- Consider the use of an econometric model to leverage aid.
- What does UTSA spend on DPS and DPT scholarships, and what is the return on that investment in terms of enrollment, tuition revenue, and academic quality?
- How much does UTSA award in college and departmental scholarships? How many scholarships are involved? How many are designated to first-year students? How many are for transfers? How many are for returning students? How many have need-based criteria?
- Who manages coordination of college and departmental scholarships?
- On page 6, the report states, “much more can be done to align future scholarship programs with the Honors College.” How so? What are the barriers to that alignment?
- On page 10, there is a graph showing summer Pell Grant budgets with the implication that the restoration of summer Pell will increase summer enrollment. Adding summer enrollment to that graph would be helpful in understanding the past relationship between the two.
- UTSA awards more institutional work-study than federal or state work-study. What are the expenditures for each source and has the institutional percentage increased over time?
- How many students receive work-study funds? What percentage of the work-study budget has been spent in recent years?
- At what point, do you first engage prospective students regarding scholarships, financial aid, and affordability? Are there opportunities for messaged communication around these issues that both promote financial literacy and UTSA as a potential college choice?

Recruitment and Marketing

The recruitment and marketing working group organized its situation analysis around seven themes: location, enterprise strategy/change management, brand identity management/reputation, recruitment and outreach, relationships and partners, market alignment, and competition. The group offered several potential strategy ideas, but the members prioritized a university-wide CRM, stronger data governance and integrity, university-wide collaboration on student recruitment achieved in part through a recruitment council and college/departmental recruiters, a consistent brand platform, and increases in online course and program offerings. The discussion with the Task Force focused mainly on data management, enterprise challenges, and brand identity.

I recommend the group take the following steps and/or address the following questions to strengthen the exploration, analysis, and/or existing practice.

- The document lacks a thorough examination of recent recruitment funnel metrics. This is a necessary addition to the analysis.
- Is there no single clearinghouse for partnerships? Does any office “own” partnership development and oversight?
- While a CRM is a necessary tool for recruitment and marketing work, UTSA must consider short-term solutions to improve prospect and inquiry management.
- What data support the assertion that “alumni perceive that they are not engaged other than for monetary donation?” While I don’t doubt that to be true, assessing the implications for enrollment and how to address that requires a complete understanding of the issue.
- What data support the assertion that employers are unaware of what UTSA has to offer? Again, understanding the nature and depth of the problem is essential to addressing it.

- Who currently “owns” brand identity and stewardship?
- How is UTSA evaluating the efficacy of regional recruiters?
- Is there any recruitment or admissions presence on the Downtown Campus?
- How many students are enrolled in dual credit and career pathway programs at the Downtown Campus?
- Some data on the international recruitment effort, including funnel analysis, and more details on the international student population would strengthen this analysis.
- There is a reference to counselor fly-ins. I am a huge proponent of counselor outreach programs and their efficacy.
- Do we have a sense of the profile, retention patterns, and academic performance of students enrolled in mainly online courses or in online programs?
- Some analysis to accompany the data provided for the P-20 data would be helpful.

Task Force Discussions

The Task Force reconvened on Thursday morning. The group reviewed the SEP timeline, examined the action planning process and tools, and discussed potential strategies for action planning.

Action Planning Tool

The Task Force reviewed an action planning tool that includes all of the elements necessary in action plan development. I have provided the tool to the SEP chair under separate cover, and it is included as an appendix to this report.

Transition to Action Planning

The Task Force discussed a number of potential strategies for action planning. Those strategies are documented in an Excel file, “UTSA – Potential SEP Strategies (January 2018),” forwarded to the SEP chair under separate cover and attached as an appendix to this report. The Joint Task Force Leadership Team will consider those possibilities and how they fit into other institutional planning efforts. Several of these strategies address university-wide systems issues and may best be developed outside of SEP. Following the Joint Task Force Leadership Team’s discussions, Lisa Blazer will work with the working group chairs to identify action planning teams for the strategies moving forward in SEP. The action planning teams will develop the strategy action plans. The action planning teams may consist of Task Force and working group members who are familiar with the SEP process and framework as well as campus content experts who may be essential to the success of particular initiatives. The action planning teams should strive to have the action plan drafts complete by March 2 so that the Task Force members and I have the opportunity to review them in advance of the March 6 discussion. The strategies under consideration include:

- ASAP improvements
- Course management
- CRM system
- Data governance
- Dual credit programs

- Financial aid leveraging
- Financial aid messaging
- Online learning strategy
- Partnerships
- Prospect and inquiry management
- Scholarship/fellowship management
- Transfer recruitment and admissions
- University-wide marketing coordination
- University-wide recruitment coordination
- Work-study program modifications

To support the work of the Joint Task Force Leadership Team, Can Saygin asked that we map the strategies against the student life cycle. I have prepared that document, delivered it to Dr. Saygin and Dr. Blazer under separate cover, and attached it as an appendix to this report.

Next Steps

SEP Visit Schedule and Timeline

What follows is the current schedule for SEP at The University of Texas at San Antonio.

Visit	Dates	SEP Phase	Objectives/Focus
One	November 7-8, 2017	Phase I – Preparation and data analysis	SEP process discussion with leadership; solidify organization; identify preliminary planning assumptions and KPIs; review data needs; set the stage
Between visits: Task Force and leadership confirm working group composition, planning assumptions, and preliminary KPIs; make arrangements for conference-style launch; continue data collection			
Two	December 5-6, 2017	Phase I – Preparation and data analysis	Conference-style launch of SEP process with working groups; SWOT identification; prepare for situation analysis
Between visits: Working groups prepare situation analyses in their respective focus areas; identify potential SEP strategies to action plan			
Three	January 24-25, 2018	Phase I – Preparation and data analysis; Phase II – Strategy ideation	Situation analysis review; initial strategy ideation; action planning organization
Between visits: Working groups and/or strategy teams action plan possible SEP strategies for first action plan review			
Four	March 6-7, 2018	Phase II – Strategy ideation	Action plan review one; additional strategy ideation
Between visits: Working groups and/or strategy teams revise action plans with feedback from the first review and action plan possible SEP strategies for the second review			

Five	April 3-4, 2018	Phase II – Strategy ideation	Action plan review two
Between visits: Working groups and/or strategy teams revise action plans with feedback from previous reviews			
Six	April 25-26, 2018	Phase II – Strategy ideation; Phase III – Goal setting	Strategy prioritization/plan formation
Between visits: Task Force and leadership finalize initial SEP strategy set and draft the written plan; SEP consultant builds enrollment, revenue, and expense models; prepare for implementation; identify implementation/continuation team			
Seven	May 22-23, 2018	Phase IV – Implementation	Implementation/initial roll-out
Between visits: Implementation team begins its work; plan for broader campus roll-out			
Eight	Fall 2018	Phase IV – Implementation	Implementation follow-up

Academic Program Demand Analysis

My RNL colleague Pam Lee recently received the necessary data from UTSA to complete the secondary research phase of the Academic Program Demand Analysis. The secondary phase includes analysis of both undergraduate and graduate programs and will be complete in early February. The primary phase will begin at that time and include survey research and analysis for potential undergraduate programs UTSA wishes to test in the marketplace.

Work between Visits Three and Four

Lisa Blazer

- Work with UTSA leadership and other Task Force leaders to identify which recommended strategies to action plan as part of the SEP process.
- With the working group chairs, identify the action planning teams for each strategy.
- Provide support to the Task Force, working groups, and action planning teams.
- Make arrangements for the fourth campus visit.

Action Planning Teams

- Draft action plans by March 2 for discussion with the Task Force on March 6.

Task Force

- Participate in action planning teams as necessary.
- Continue to explore the themes from the situation analyses and subsequent discussions for potential SEP strategies.
- Review the first wave of strategy action plans in preparation for the March discussions.

Working Groups

- Review the situation analyses from other working groups.
- Revise the situation analysis with materials from visit three discussions and additional data analysis.
- Participate in action planning teams as necessary.

Data Team

- Continue the posting of existing reports and materials.
- Continue the collection of requested data.

Brad Goan

- Present the deep-dive diagnostic to Senior Leadership and the Dean's Council on February 7.
- Provide remote support to the SEP chair, the Task Force, the working groups, and the action planning teams.
- Coordinate with the SEP chair on visit four planning.
- Review the first wave of strategy action plans in preparation for the March discussions.
- Confer with other Ruffalo Noel Levitz team members providing service to UTSA to ensure effective integration into the SEP process.

Proposed Goals and Schedule for SEP Visit Four

Goals

- Review the first wave of action plan drafts.
- Identify any additional data needs at this stage of the project.
- Confirm the second wave of strategies for action plan development.
- Continue strategy ideation and action planning.

Possible Schedule

Tuesday, March 6

9:00 a.m. – 12:00 p.m.	Task Force and action planning teams: Action plan review
12:00 – 1:00 p.m.	Lunch
1:00 – 4:00 p.m.	Task Force and action planning teams: Action plan review

Wednesday, March 7

9:00 a.m. – 12:00 p.m.	Task Force: Strategy discussion; identification of the next wave of strategies for action plan development
12:00 – 1:30 p.m.	Working lunch with Lisa Blazer
1:30 – 2:30 p.m.	Executive Debrief with the President Eighmy

Appendix

- UTSA SEP Task Force (1-25-18).pdf
- UTSA Potential SEP Strategies (January 2018) .xlsx
- UTSA Strategy-Student Life Cycle Mapping.xlsx
- UTSA Action Planning Tool.xlsx

