

Integrated Student Success Plan

A Student-Focused Strategy

August 2018



Executive Summary

On October 30, 2017, UTSA launched the Presidential [Student Success Task Force](#) initiative chaired by Dr. Rhonda M. Gonzales. The twenty-nine-member task force was charged with developing an integrated student success plan inclusive of goals, metrics, accountability and self-assessment that would ensure that UTSA students have an exemplary experience.

The Planning Process

The *Integrated Student Success Plan: A Student-Focused Strategy* conveys the recommendations developed by EAB, who were hired to lead the UTSA task force in developing the plan. The plan has been developed over the course of initial diagnostic meetings held in November and December 2017 and seven subsequent site visits to our campus between January and June 2018. During these visits stakeholders from across campus – inclusive of staff, faculty and students – were interviewed to establish an inventory of ongoing student success efforts. The initial set of student success initiatives identified were combined with the results being generated from the President’s Strategic Enrollment and Finance and Budget Modeling Task Forces (Joint Task Force) which were simultaneously underway to generate a comprehensive set of recommendations that would help UTSA meet its goals. The projects captured in the *Integrated Student Success Plan* constitute those being led by the division of student success in collaboration with university stakeholders who will be integral to completing the efforts.

What is a Student-Centered Definition of Student Success at UTSA?¹

One outcome of the task force’s work included a goal to develop a student-centered definition of student success. The following five-point definition is the outcome of an initial task force draft and student focus group.

Student Engagement and Belonging

An inclusive student minded culture exists that provides a positive student experience resulting in student connectedness towards UTSA both during their time pursuing a degree and post-graduation.

Student Retention and Persistence

All students remain, register each semester, and successfully continue their undergraduate education.

Educational Attainment

All students persist to degree completion and attainment of their degree, program, or educational goal within a timeframe that is desirable to the student and with the least amount of debt possible.

Academic Achievement

Students achieve increasingly higher levels of academic performance as they progress through and complete their college experience.

Student Advancement

Students have the ability to participate in high impact practices (including, but not limited to employment, internships, experiential learning, research, and co-curricular experiences) and are prepared to articulate their marketable skills in order to obtain desired post-graduation employment and beyond (achievement, impacting people/programs, research, networking).

1) ¹ Student focus groups scheduled through September 14, 2018 are expected to produce additional student feedback to inform and further refine the Student-Centered Definition of Student Success at UTSA.

2018-2019 Priorities

The *Integrated Student Success Plan* details the projects that will be prioritized in 2018 as well as those that will be added and expanded upon in 2019 and beyond.

The 2018 project priorities include:

- Advising Excellence Project Plan
- Coordinated Care Network Project Plan
- Graduation Action Project Plan
- Student Success Communication Project Plan
- Data and Progress Tracking Project Plan

2019 and beyond projects include:

- Expanded Coordinated Care
- Expanded Progress Report Utilization
- Peer Mentoring
- Student Hiring Hub and Training
- Expanded Advising Excellence

Implementation and Evaluation

EAB's four-phased framework was used in the development of the plan (Phases I and II) and will be followed in implementation and evaluation (Phases III and IV). The four phases include assessment, awareness & alignment, implementation, and evaluation. The goal of assessment phase I was to understand the current state and analyze opportunities for improvement. Once recommendations were identified and documented they must be shared to gain stakeholder buy-in. The process of sharing the recommendations takes place during the awareness and alignment phase II. In addition to communicating recommendations, agreement needs to be made about what to prioritize and how to allocate resources to support the work that needs to be accomplished. Once initial plans have been established implementation will begin. Throughout implementation check points are built into the process to evaluate progress against key performance indicators. These comprise phases III and IV.

Resources

EAB consultants have identified key staff recommendations as resources needed to execute the *Integrated Student Success Plan*. These included establishing a Vice President for Student Success, as well as two full time positions to staff student success systems. The recommended positions include a program coordinator and an IT Business Analyst. The two will be leads in process improvement facilitated by technology to enhance student retention, timely graduation, and student experience. The primary focus is on leveraging the UTSA Student Success Management System including training end users, rolling out new features, understanding all system functions, workflow, reports, and analytics that will drive measurable results in student success.

Goals

The goals of this plan are to create and fine-tune processes and programs that provide our UTSA students with an excellent student experience from the time they onboard with us through their career launch. This includes ensuring that our first-year retention rates and four- and six-year graduation rates continue to improve until we meet and exceed our minimum goals of 85% first-year retention and 35% four-year and 60% six-year goals. Reaching and sustaining these goals must rest on regular intervention calendars and processes that UTSA will develop and use to ensure that we are proactive in removing unnecessary barriers our students face, and that we have processes in place to proactively resolve common problems that our students encounter.

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Guide Project Plan

Campus Project Plan

Note: At EAB, we offer our members expert advice and innovative strategies for tackling their most pressing issues, tested and proven to work by their peers at other institutions across the country. Rather than reinvent the wheel, our members benefit from the learning of thousands of other colleges and universities facing the same challenges. Our recommendations for UTSA in this plan are a direct result of applying our best practice research to our in-depth analysis of UTSA’s current and ongoing initiatives.

UTSA's Strategic Planning Process

During the 2017-18 academic year, President Taylor Eighmy launched a strategic planning process to provide a pathway for the university to reach new levels of excellence over the next decade. Several components were put into place over the course of the year to provide the framework.

STRATEGIC THEMES

As a starting point, [six strategic themes](#) were identified and shaped through discussions with faculty, staff and students. The themes provided a common understanding of institutional priorities and the vision for UTSA's future.



Figure 1

PEER MODELS OF EXCELLENCE

To help benchmark UTSA's progress, UTSA identified ten institutions to serve as [peer models of excellence](#). Selected for their aspirational qualities, UTSA is emulating their strategies and best practices throughout the strategic planning process.



Figure 2

KEY PERFORMANCE INDICATORS

A set of Key Performance Indicators (KPIs) pinpoint UTSA's goals and facilitate progress assessment. Five and 10-year targets have been set for each KPI, driving operational awareness toward common goals.

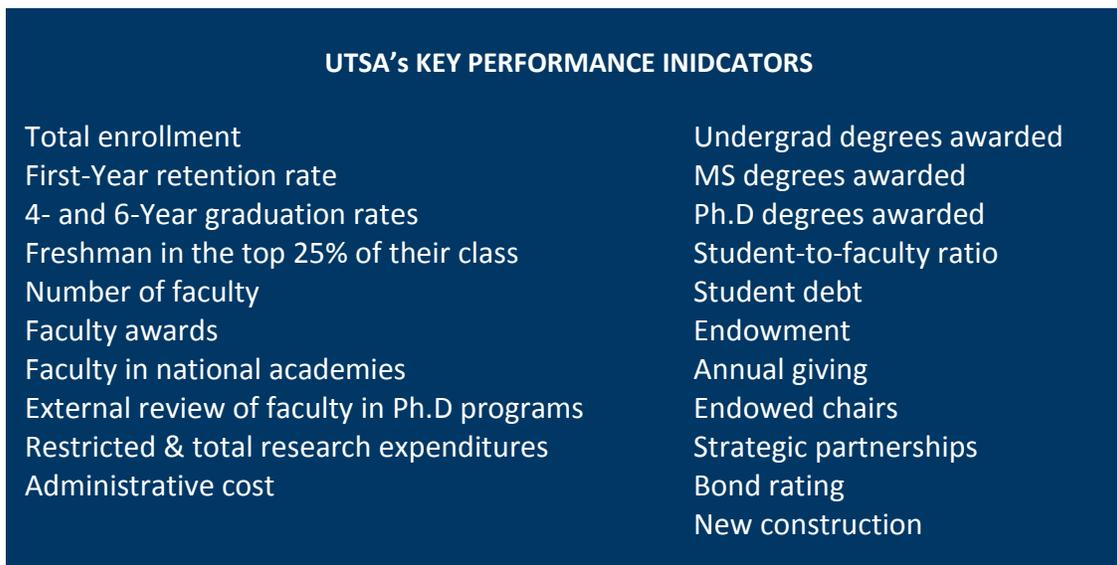


Figure 3

INITIATIVES

Three major initiatives launched in the fall of 2017: [Student Success](#), [Strategic Enrollment](#) and [Finance and Budget Modeling](#). The task forces and consultants for each of the three initiatives worked closely together to ensure alignment given their multiple interdependencies.

DESTINATIONS

In the fall of 2018, UTSA's strategic planning framework evolved to sharpen the focus on what kind of institution the university will become in the decade ahead. Based on input from internal and external stakeholders, as well as the UT System Board of Regents, UTSA has three overarching destinations that point us to the future.



Figure 4

Student Success Task Force

Charge

The Student Success Task Force will develop an integrated student success plan that includes goals, metrics, accountability and self-assessment. The plan will adopt a student-focused strategy and consider a pipeline continuum from K-12 through recruitment, enrollment, academic progress, career services and placement. This task force will examine best practices from other institutions and think expansively about administrative structure, accountability and resources.

Task Force Members

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Definition of Student Success

This plan is a roadmap for student success at UTSA to move towards helping students graduate in less time, with less debt, with better outcomes. The outputs will move UTSA toward a student experience that creates both social and academic belonging and engagement. It is important to establish a common definition of what student success means for UTSA to better understand the direction the University is moving.

EAB researchers worked directly with over 200 students to ask how they define success. For students, success consists not just of good grades and steady progress toward graduation, but a holistic sense of fulfillment. They want to become strong candidates for careers in their chosen fields, emerge as competent and trustworthy adults, look back on their time without regrets, and make their mentors and family members proud.²

All stakeholders, including but not limited to faculty, staff, administration, and students at UTSA have a role in student success which can take on many forms. No one unit, office, or individual can truly “own” student retention and completion, given the incredible complexity of students’ experiences on campus. From enrollment management and student affairs to advising offices and undergraduate colleges, dozens of organizational units on campus can (and should) stake a claim to student success. Making a meaningful improvement in retention and graduation rates requires extensive coordination among all of these stakeholders.³

Based on research, it is clear that the new student success mandate is to graduate more students, in less time, with the least amount of debt possible, with better outcomes. To improve UTSA culture and accelerate student success gains, we must continually remind both internal and external stakeholders what student success looks like at UTSA. With input from UTSA students, the Interim Vice President for Student Success and the Student Success Task Force are continuing to think about this and have developed the unified vision of student success for UTSA outlined below. This definition is the product of reviewing UTSA’s student success goals and strategic vision, and careful deliberation by the Student Success Taskforce. The subsequent 2018 student success initiatives laid out in this plan reflect the ranked priorities of members of the Student Success Taskforce.

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2) ² Source: Shapiro D, et al., “Completing College: A National View of Student Attainment Rates – Fall 2010 Cohort (Signature Report No. 12)” National Student Clearinghouse Research Center (2016); Federal Reserve Bank of NY: https://www.newyorkfed.org/research/college-labor-market/college-labor-market_underemployment_rates.html#; EAB interviews and analysis

3) ³ Koproske, C. “Defining the Faculty Role in Student Success.” (2016). <https://www.eab.com/research-and-insights/academic-affairs-forum/studies/2016/defining-the-faculty-role-in-student-success>

The Student Journey of Today

Today, new students are welcomed to UTSA with a comprehensive onboarding experience where they may learn about campus resources and advising. Depending on a student's needs, he/she might be placed in a program such as LEAD to receive additional summer onboarding support. New students to the university are inundated with information about resources, but they will likely be too overwhelmed to take full advantage of them. Students are assigned academic advisors but tell us that they cannot seem to get all their questions answered in one place. They are sent from office to office, each time having to explain previous conversations. Students get frustrated and may stop using resources altogether. Furthermore, some students have an abundance of support from being assigned several peer mentors, but others have none and do not know that this is a resource they could be using.

After the first year at UTSA, students often feel like they are left to fend for themselves. As academic or financial struggles arise, they may not be aware of where to go for help. A hold may be placed on their account preventing them from registering, and they wonder if it's even worth coming back next semester. A student might stay and navigate through their program, with the help of their advisors, but might find out right before graduation that they have not met all the requirements. At this point, they are likely to question the value of staying at UTSA.

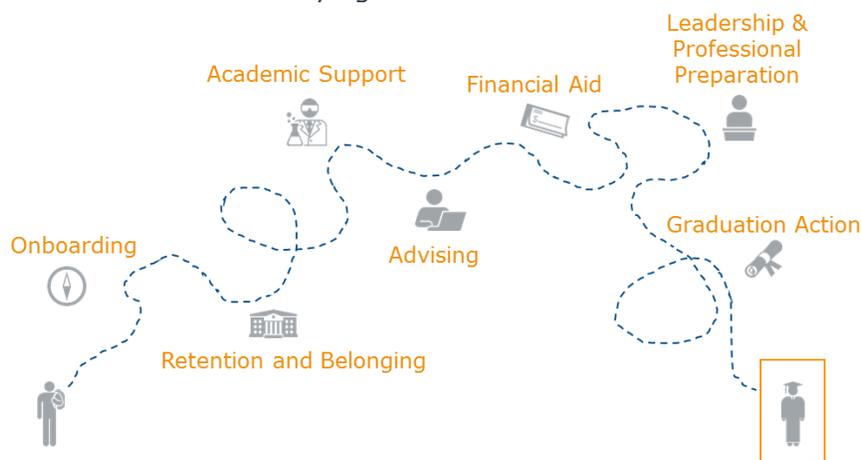


Figure 5

Students struggle to make sense of the complex systems within University settings; they often do not know where to go or what questions to ask.

The Student Journey of Tomorrow

During their orientation to UTSA, students learn about their advisors, peer mentors, and various other resources available to them. They receive the right communication at the right time, and all conversations they have with student support staff and advisors are tracked so students do not need to constantly repeat themselves or explain their situations. Students are fully aware of the requirements for their major and receive timely and appropriate communication from their advisors as reminders. Faculty are able to share mid-semester feedback with advisors so students receive help when they need it, not after it's too late. Finally, students are aware of graduation requirements and deadlines. The graduation application is easy to complete and the process of confirming a degree is streamlined. Students graduate in a timely manner and begin careers that they are excited about and prepared for.

Implementation Plan Framework

A four phased framework is being utilized in the development of the student success plan. Each phase builds on the next to ensure a comprehensive approach. The four phases include assessment, awareness & alignment, implementation, and evaluation. The goal of the assessment phase is to understand the current state and analyze opportunities for improvement. This information is gathered from faculty, staff, and students. Once recommendations are identified and documented they must be shared to gain stakeholder buy-in. The process of sharing the recommendations takes place during the awareness and alignment phase. In addition to communicating recommendations, agreement needs to be made about what to prioritize and how to allocate resources to support the work that needs to be accomplished. Once initial plans have been established implementation can begin. Throughout the implementation process check points are built into the process to evaluate progress against key performance indicators.

Phase I: Assessment

- Conduct onsite diagnostic (information gathering and process mapping of key student experience areas)
- Prioritize barriers and discuss areas of opportunity (Task Force)
- Review recommendations and current initiatives (Task Force)
- Perform deep dive process and stakeholder analysis

Phase II: Awareness & Alignment

- Define student success for UTSA
- Prioritize recommendations in alignment with institutional key performance indicators
- Allocate resources to each priority
- Meet with individual student success owners to share recommendations, create common goals, and develop project plans – including performance indicators
- Share information with stakeholders about technology that can be leveraged and develop tool service plan/roll out strategy
- Communicate with stakeholders about the plan and realignment of resources

Phase III: Implementation

- Provide implementation support to teams (onsite once a month and virtually) to execute project plans and support technology roll out
- Work with IR, IT, and Interim VP of Student Success to develop data and metrics tracking dashboard
- Develop formal communication plan to keep stakeholders informed of progress
- See individual high-level project plans*

Phase IV: Evaluation

- Compile results based on success metrics
- Showcase wins and successes
- Identify lessons learned
- Continue the cycle of ongoing assessment and process improvement
- Being planning to implement additional priorities

Organizing Around Building Blocks of Student Success

UTSA has completed numerous Student Success initiatives across the years owned by variety of institutional leaders. However, a division/leader of Student Success has not existed until the newly formed Vice President for Student Success.

A challenge for UTSA to date has been the management of the numerous initiatives into one cohesive ongoing operating structure that can be successfully monitored to ensure maximum impact. This has arisen to the ambiguous nature of what should be constituted as “Student Success” (anything and everything). Therefore, a central tenet of EAB’s recommendation is that each initiative fit within a building block of Student Success. We recommend using this structure as we discuss Student Success initiatives so that any new idea clearly falls within one of them and we weigh that against other priorities in those areas.

As you will see later in the document, our implementation teams/efforts may cross over multiple blocks (for maximum impact) or be focused within specific blocks (and even specific tactics within those blocks) as we need to be focused with the various solutions.

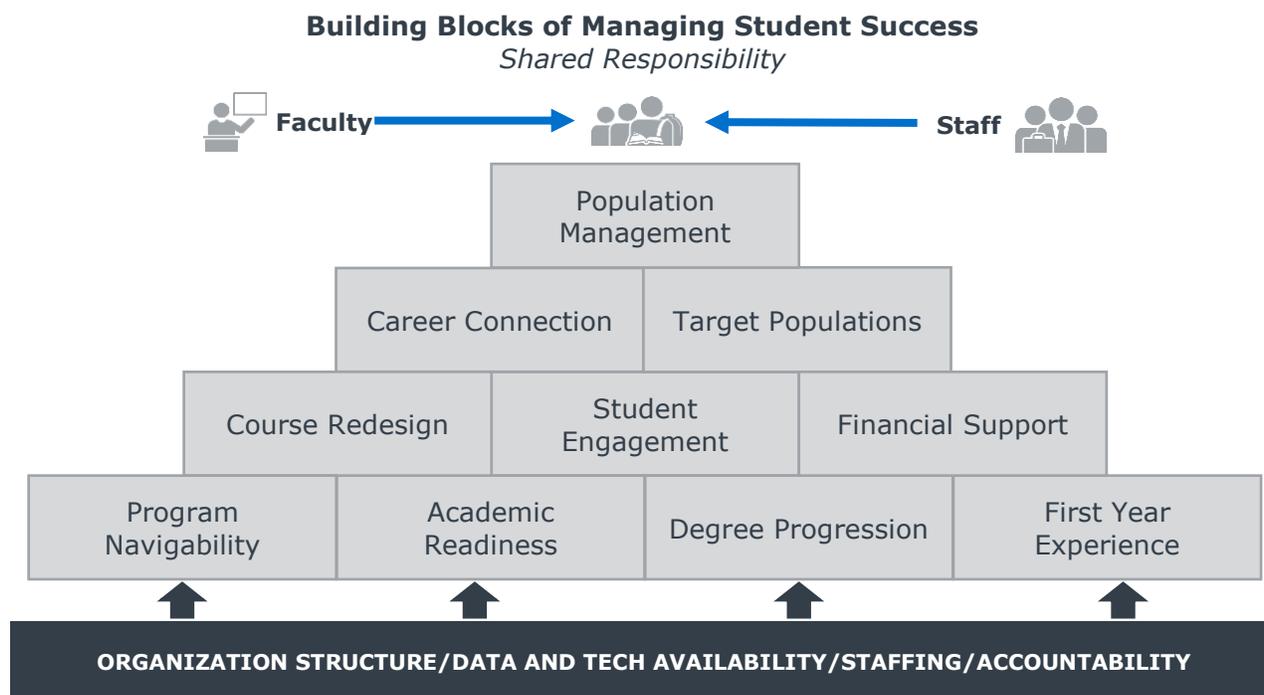


Figure 6

As the graphic above depicts, Student Success is owned by Faculty, Staff and the Student and therefore a successful Student Success strategy must involve constant collaboration with those groups. Some of the blocks such as Course Redesign are heavily driven by faculty whereas others, such as First Year Experience, are driven more by staff. It is important to not think about these blocks as departments (i.e., tutoring, financial services, advising) but instead “areas of focus” where organizational, staffing, tech/data availability and accountability structures must then be layered on. The various technologies provided by EAB as well as other technologies provided on campus should supplement these building blocks.

Building Block	Examples of Topics in this Block	Representative Examples at UTSA
Program Navigability	General Education requirements, meta majors, curriculum complexity, academic policies	AIS Academic Pathways
Academic Readiness	Bridge programs, developmental education and supplemental instruction/support	LEAD and SOAR
Degree Progress	Degree planning and progress management including incentives and capacity planning	Academic Plans, Block Schedules, Graduation Help Desk
First Year Experience	Student onboarding, FYE programs, cohorts and mentoring including transfer students	Roadrunner Transition Experience
Course Redesign	Critical course review, new scalable pedagogical models	Math Matters, Success Markers
Student Engagement	Campus employment, student groups, resident life	Peer Mentorship, Hiring Hub
Financial Support	Scholarships, emergency grants, FAFSA filing support and financial awareness	Emergency Aid
Career Connection	Recruiting activities, employer matching, career advising/coaching	60x30TX
Special Populations	First Generation Students, Hispanic Students	First Generation
Population Management	Identification of risk (early warning, predictive), referral and management	EAB Technology, Advising Redesign

Figure 7

EAB's Support within the Building Blocks

Key milestones impact students throughout their college journey that effect both social and academic belonging. These milestones include, but are not limited to, onboarding, advising, academic support, financial aid, leadership and professional preparation, experiential learning, and graduation. UTSA has had a heavy focus on developing initiatives to help break down barriers to student success. The goal of the student success plan is to build on the foundation of student success that exists and focus on creating a culture that is unified, responsive, and student centered. A prioritization exercise was conducted by the Joint Presidential Task Force in an effort to identify which recommendations would have the highest impact and the appropriate allocation of resources. Based on that assessment the following student success priorities have been identified as key areas of focus to launch in 2018: Advising Excellence; Coordinated Care Network; Gradation Action; Student Success Communication and Data and Progress Tracking.

Advising is at the core of the student success enterprise, but we cannot expect advisors alone to bear the sole responsibility for student support. To support the holistic development of students and meet evolving expectations of care, progressive institutions like UTSA want to reengineer structures, services, and processes to architect a truly coordinated network of support. This is why it is critical for UTSA to focus on developing proactive coordinated interventions with students who need it, when they need it and we create a coordinated care network between different units.

The first phase of the UTSA coordinated care network will involve Advising, the First Generation & Transfer Student Center, LEAD Summer Academy and SOAR. We will also be developing a progress report strategy starting with Math Matters courses. There is an additional focus on graduation and identifying the biggest barriers to timely degree completion that will be owned by the Graduation Helpdesk. Finally, in the initial planning stage, the Interim Vice President for Student Success and the Student Success Task Force will develop a robust communication plan and establish an accessible and transparent way to report on the metrics and progress of each of these areas.

The following teams allow us to impact multiple building blocks of student success. For example, Advising Excellence will help support "Population Management" and "Degree Progress".

2018 Projects

Advising Excellence: Assess current state of proactive advising including use of intervention calendar, campaigns, impact tracking and reporting

Creating a Coordinated Care Network: Enhance collaboration and sharing of information through the use of SSC Campus – pilot roll out to include LEAD & SOAR, First Generation & Transfer Student Center (FGTSC):

- **First Generation & Transfer Student Tracking:** Track yield of first generation students from application to F2G&G; Track students who utilize RTE (Roadrunner Transition Experience) resources/services; Onboarding – assign transfer students a peer mentor
- **LEAD & SOAR Summer Academies Tracking:** Track student outcomes by cohort by creating a category in SSC Campus
- **Progress Reports:** Implement progress reports for LEAD, SOAR, and Math Matters courses

Graduation Action: Break down barriers to graduation by leveraging Graduation Helpdesk and other stakeholders to ease operational barriers to graduation – shorten application, enhance and increase communication, etc.

Communication: Create student success communication plan that outlines specific stakeholder messages and delivery channels

Data & Progress Tracking: Create a key performance indicator dashboard – a tracking and reporting mechanism for VPSS to provide progress updates and outcomes

Advising Excellence Overview

To develop a more data-driven and proactive advising program, leaders are working with advising directors to determine how they are currently tracking student interventions and advisor appointments. By making this process more efficient, advising directors will be able to easily report on progress and success. The next step will be to leverage analytics to map out institutionally and at the advising center level which student groups need which types of interventions at any given point in time. This will allow clear, coordinated outreach that can be effectively tracked.

Advising Excellence Project Plan

Step 1: Assessment

May – June 2018

- 1.1 Conduct current state assessment of advising student outreach and tracking
- 1.2 Review current state and identify additional ways to track outcomes to show impact
- 1.3 Assess SSC Campus utilization and identify opportunities for enhancement and/or training

Step 2: Implementation

July – October 2018

- 2.1 Use institutional reports and population health dashboards to propose targeted outreach and intervention calendar

Relevant Building Blocks
Population Management
Degree Progress

- 2.2 Build robust intervention calendar of communication plans for target populations
 - Intervention calendar includes all outreach, SSC campaigns, call campaigns, and proactive intervention efforts to ensure students persist and graduate. Examples of interventions include:
 - All re-enrollment campaigns (i.e. to include targeted outreach for students on academic warning and probation)
 - Call campaigns to students not enrolled
 - Coordinated outreach to academically dismissed students
 - Intervention to students on academic probation in their first fall
 - Graduation communication (i.e., who is eligible to apply, when and how to apply)
- 2.3 Develop standard tracking mechanisms (i.e. which reason codes or tag) that support this effort within the platform

Step 3: Training

November – December 2018

- 3.1 Train advisors on intervention calendar and outreach methods
- 3.2 Receive feedback during the training process
- 3.3 Create training resources to assist with campus coordination

Step 4: Adoption and Action

January 2019 – Ongoing

- 4.1 Coordinate with other areas across campus to target students based on intervention calendar
- 4.2 Outreach to students based on intervention calendar
- 4.3 Track against KPIs

Sample Metrics:

- # of campaigns launched
 - # of appointments scheduled from campaigns
 - % completion of registration campaigns
 - % of students who achieve desired outcome from campaigns
- Examples: registration, degree planning, submission of a 4-year degree plan

Coordinated Care Network Overview

The Coordinated Care Network is a network of coordinated support providers, connected by technology and processes, to make it easier for students to navigate the system and receive holistic support. By expanding the number of support units in the Campus platform, UTSA will create a comprehensive network of student support units, unified through a single technology enabling them to track communication, and share critical information and records of their interactions with students. This process has begun with meetings with stakeholders from advising, LEAD, SOAR, and the First Generation & Transfer Student Center to establish a common set of goals that will translate into metrics.

Coordinated Care Network Project Plan

Relevant Building Blocks

Special Populations
First Year Experience
Student Engagement
Population Management

Step 1: Communication Plan

March – May 2018

- 1.1 Map out existing and future key student success stakeholders for coordinated care network
- 1.2 Complete prioritization and timeline exercise
- 1.3 Recommend focus on existing initiatives (i.e. LEAD & SOAR, 1st Gen, Transfers)

1.4 Launch communication plan

Step 2: Technology Audits

June – September 2018

- 2.1 Audit existing technologies, workflow, and case management practices by unit
- 2.2 Conduct a needs assessment and customized demo of SSC Campus based on most helpful functionalities
- 2.3 Select ideal functionality to implement (i.e. appointment scheduling, referrals, data reporting/advanced search, campaigns, and/or progress reports)
- 2.4 Pilot progress reports with LEAD, SOAR, and Math Matters courses
- 2.5 Identify at least one person by unit or initiative to serve as a Location Administrator to assist the Campus App Administration with configurations and training

Step 3: Location Admin Hand-Off

October – November 2018

- 3.1 Leverage Location Admin to own training for their unit and ongoing configuration changes
- 3.2 Establish process for triaging and monitoring referrals within unit
- 3.3 Focus on training new workflow and use of SSC Campus and impacting units (i.e. advising through referrals or notes)

Step 4: Celebration

December 2018

- 1.4 Track against KPIs based on unit and functionality used

Sample Metrics:

- # of advisors/staff members trained on how to issue alerts
- # of unique students with alerts/cases issued
- # of open and closed referrals
- # of cross-shared notes
- Response rates to progress reports and campaigns
- Persistence of students impacted
- Use SSC and institutional research to track improvements, and report at minimum each month

Graduation Action Overview

The Graduation Helpdesk has identified several key barriers to timely graduation and is currently working to determine which are high-impact and under the purview of the Helpdesk to solve. Areas of focus include the graduation audit process, the academic program review process, outreach to students not enrolled, and the process of setting academic enrollment caps to allow nearing-graduation students to take remaining courses required for graduation.

Potential Areas of Focus:

- Graduation / Process – Graduation Audit: Intervene with those not on track to graduate (e.g. missing a course) to prevent delays in graduation
- Academic Program Review / Process – Clear Program Requirements & Cross-program Alignment: Remove “hidden” requirements from programs of study (e.g. courses listed as

“recommended” for a core requirement rather than as a “required” course for a major despite the course serving as a prerequisite for major coursework)

- Process / (Outreach to Students Not Enrolled): Consider an “auto-graduation” initiative that awards degrees to students that have completed degree requirements even if they do not file an application for graduation (similar to other institutions)
- Academic Program Review, Student Experience / Process (Enrollment Limits): Determine if certain programs have a maximum number of students that could realistically complete their requirements in a timely manner given limits on instructional resources (instructors, facilities, etc.) and set enrollment caps accordingly

Graduation Action Project Plan

Relevant Building Blocks
Population Management
Degree Progress

Step 1: Assessment

August – September 2018

- 1.1 Conduct current state assessment of Graduation Helpdesk
- 1.2 Review current state and identify barriers to graduation
- 1.3 Determine which barriers can be impacted by advising and/or helpdesk and which are external
- 1.4 Prioritize focus areas and clearly define goals

Step 2: Planning

October – November 2018

- 2.1 Determine steps to remove barriers
- 2.2 Build project plan to execute and track progress
- 2.3 Align resources needed to implement
- 2.4 Involve stakeholders to gain buy-in

Step 3: Implementation

December 2018 – May 2019

- 3.1 Execute project plan

Step 4: Evaluation

June 2019 – Ongoing

- 4.1 Monitor progress against KPI's

Sample Metrics:

- Increase % of those eligible for graduation who submit graduation applications
- Increase % of students who apply for graduation and who are accepted
- Increase total number of graduates each semester and overall graduation rate

Student Success Communication Overview

In order to change the culture and accelerate the student success work being done at UTSA, student success leaders must continually remind both internal and external stakeholders what student success means at UTSA. The Vice President for Student Success and the Student Success Taskforce are continuing to think about this and have been working on a unified vision of student success for UTSA.

Student Success Communication Project Plan

Relevant Building Blocks

A student success communication plan underpins all building blocks

Step 1: Identify Communication Landscape

March – June 2018

- 1.1 Take stock of UTSA's current communication practices and resources
 - Understand who will participate in communications, what communication channels are available, and successful previous practices
- 1.2 Develop a unified vision and definition of student success with the Student Success Task Force and key stakeholders
- 1.3 Understand what "Return on Education" means for UTSA

Step 2: Develop Message

July – September 2018

- 2.1 Using vision and definition, develop a concise student success value statement based on UTSA's institutional goals
- 2.2 Create an elevator pitch that addresses "Why" you are investing in student success
- 2.3 Identify one or two student stories that will resonate with stakeholders, and incorporate into messaging
- 2.4 Anticipate questions from constituents, and prepare appropriate responses
- 2.5 Develop a motivational campus presentation

Step 3: Understand Stakeholders

October – December 2018

- 3.1 Create matrix outlining who your stakeholders are, what they care about, what they need to know, and how to reach them
 - Identify the most appropriate communicators and communication channels for each group
- 3.2 Develop timeline to share communications based on above stakeholder information
 - Use a project management style chart to visualize timelines and events

Step 4: Share Message

January 2019 – Ongoing

- 4.1 Execute on communication timeline
- 4.2 Return to student success message quarterly, tweaking stories and messaging as student success teams achieve new successes and grow impact

Data and Progress Tracking Overview

There are a lot of inputs that affect student success and UTSA's institutional Key Performance Indicators (graduation, retention, number of degrees awarded, etc.). Data and Progress Tracking is designed to create a forecasting tool that will allow the Vice President for Student Success the ability to drill into those inputs to see what is happening with students in real-time. While there are Institutional Reports in SSC Campus that have a lot of information, there are likely many other data sources that are not being used today to develop insights. Tools to be leveraged to take action today include the Population Health Dashboards and Institutional Reports in SSC Campus.

Data and Progress Tracking Project Plan

Relevant Building Blocks

Population Management
Degree Progress
Special Populations

Step 1: Develop Dashboard

July – October 2018

- 1.1 Create a VP for Student Success forecasting resource with real-time, semester, and annual metrics such as:
 - First time, full time students <15 credits
 - Students >3.8 and students <2.0 (probation status included)
 - Registered for next semester (Y/N, if no list Registration holds)
 - Graduation application statuses
 - Retention and Graduation rates by program, college, and special populations (first gen, dreamers, transfers, etc.)

Step 2: Benchmark and Forecast

November – December 2018

- 2.1 Establish benchmarks for year-to-year comparisons and a mechanism to forecast based on entering cohort or estimated graduation date
- 4.3 Surveys and degree plans can also be used to increase accuracy

Step 3: Set Goals

November – December 2018

- 3.1 Set institutional and college-wide goals (annual and 5 years out) based on the data and historical performance in collaboration with Deans and other college leaders
- 4.4 If resistant or unsure, encourage each college to perform a self-study

Step 4: Measure

January – May 2019

- 4.1 Identify key metrics for programs to measure success both real-time and each semester, connected to the VP for Student Success metrics plus:
 - 4.5 # of Advisor appointments scheduled and attended
 - 4.6 # of 4-year degree plans created
 - 4.7 Referrals and Closed Cases
 - 4.8 Progress reports
- 4.2 Provide colleges with data to track progress in real-time and during each semester
- 4.3 Transform the culture to establish these conversations annually

Additional Student Success Recommendations

In addition to the 2018 student success focus areas, there are other key recommendations to prioritize and tackle moving into 2019. After the initial 2018 areas of focus move into implementation and evaluation, resources can then be aligned to the recommendations listed below. Student success leadership will begin to assign timelines and phased project plans for the 2019 initiatives in the final quarter of 2018.

2019 Projects

Expand Coordinated Care Network

January – December 2019

After successful completion of the phases outlined in the Coordinated Care Network Overview section, Interim VP for Student Success will need to determine which additional offices should be included to expand the reach of the coordinated care network. Offices should be selected based on institutional priorities and existing involvement in the student experience. Strong consideration should be given to peer mentors, embedded tutors, tutoring center, and career services.

- Phase 1: Communication Plan
- Phase 2: Technology Audits
- Phase 3: Location Admin Hand-Off
- Phase 4: Celebration

Tasks to Achieve:

- Outline plan for expanding to additional units as appropriate
- Share Case Management & communications process with all relevant stakeholders
- Train stakeholders on how to issue alerts
- Track timeliness of Case Managers in following up and closing open cases
- Review outcomes of students

Sample Metric:

- # of advisors/staff members trained on how to issue alerts
- # of unique students with alerts/cases issued
- # of open and closed referrals
- # of cross-shared notes
- Response rates to progress reports and campaigns
- Persistence of students impacted
- Use SSC and institutional research to track improvements, and report at minimum on a monthly basis

Expand Progress Report Utilization

January – May 2019

Develop and implement full Campus launch to enhance academic support, upon successful implementation of progress reports for LEAD, SOAR, and Math Matters courses.

Progress reports enable advisors to proactively request feedback from faculty to understand individual student performance in each course. Advisors can collect information on:

- A student’s likelihood of failing a class
- Their current or anticipated grade
- Current absences
- The need for a potential Alert

From Progress Reports, an advisor can:

- Intervene with students early and understand the reasons for risk
- If necessary, create an Alert for thorough follow-up from another office

Alerts: Advisors, faculty, and student support staff with the appropriate permissions can create an alert to draw attention to a student who may potentially be at-risk.

Cases: Members can configure specific alerts to automatically open a case with a specific office or staff member. Once a case is opened, the sender and recipient can add information to the case, view progress, and close the case.

Before launching case management with additional offices, an assessment to identify additional offices and interventions to track using EAB Campus's case functionality, intervention processes, and desired outcomes will need to be performed. Elements of a process map include:

- Reason
- Example of Intervention
- Triage Process
- Recommended Action Desired
- Outcome
- Successful Case Close Reason

Sample Metrics:

- Number of progress reports sent
- Number of faculty participating in progress report completion
- Number of interventions as a result of progress reports

Peer Mentoring

January – December 2019

UTSA has ample support resources available for students; however, research shows that at-risk students often fail to seek this help on their own. Because many struggling students lack the awareness or motivation to engage with these support resources when they need assistance it is imperative that peer-to-peer interactions result in peer mentors connecting their mentees to the appropriate resource. Based on UTSA student focus group feedback we know that students are learning about help organically and through peer mentoring channels. To capitalize on this and to make a greater impact on student success the infrastructure supporting peer mentoring needs to be improved and the referral process from peer mentors to faculty and staff needs to be established.

Operations

- Centralize peer mentoring programs to improve training and increase proactive accountability
- Recruit & support (\$) peer mentors to reach a healthy student-to-peer mentor ratio
- Develop UPM ladder to retain great peer mentors, following similar model to F2G&G

Technology

- Expand Coordinated Care Network to include Peer Mentors so they can capture and share valuable information and refer students to existing resources on campus

Sample Metrics:

- Number of peer mentors
- Number of peer mentor interactions
- Student-to-peer mentor ratio
- Number of referrals generated from peer mentor interactions

Hiring Hub

January – December 2019

- Develop future Hiring Hub for students to offer on-campus work opportunities: 1) Ensure Human Resources (HR) is open and willing to meet with Hiring Hub team to discuss CBC and hiring handbook exemptions to streamline this process and make it easier to hire and retain students; 2) Create and implement a policy to post all positions centrally – Handshake (can still link out to individual office pages); 3) Have 1 to 2 dedicated HR business partners who specialize with on-campus student employment
- Create career ladder and associated salary structure for all student employees
- Create a student-facing plan that outlines high impact practices available to a student throughout their college journey and publish on a portal
- Require students to input their experience reflections into DegreeWorks

Sample Metrics:

- Number of visits to the Hiring Hub
- Number of campus student employees
- Number of experience reflections in DegreeWorks

Expanded Advising Excellence

January 2019 – Ongoing

- Continue to leverage and refine the use of the intervention calendar created as part of the 2018 project plan
- Assess and standardize various forms used in the advising process that are owned by academic units and then educate and get buy-in on their use
- Either prevent a student from dropping all courses without an intervention or build a clear report for all students who drop all courses and perform immediate intervention.
 - One option to intervene with students withdrawing (dropping?) from a course is to mandate a training materials/videos for students to understand implications of withdrawing from course.
- Operations: Centralized advising space

Sample Metrics:

- Number and frequency of interventions standardized in intervention calendar
- Number of advising forms standardized
- Number of students dropping and withdrawing from courses

Student Success Resource Alignment

The time frames outlined in this Student Success Plan are contingent on having the proper resources in place who can support the full roll out and implementation of the UTSA Student Success Management System. The resources below are foundational to the success of the Plan. The key stakeholders and their associated responsibilities are outlined below.

SSC Technology Leadership and Engagement Team Structure

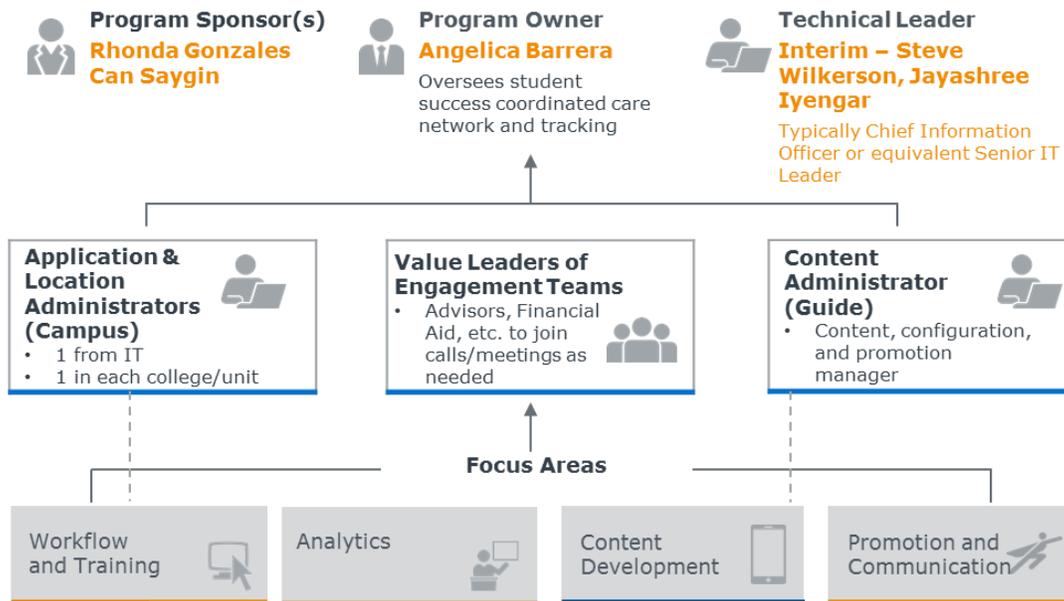


Figure 8

Roles	Responsibilities
Program Sponsor	<ul style="list-style-type: none"> Overall program and organizational champion Ensures support and holds team accountable
Program Owner	<ul style="list-style-type: none"> Leads overall effort to engage the users who will be using the product and maximizing value derived from the program
Application Administrator (Campus)	<ul style="list-style-type: none"> Primary owner of user activation, roles, permissions, and configurations Triage end user support issues and requests
Content Administrator (Guide)	<ul style="list-style-type: none"> Publishes and maintains content for the Guide mobile app through content management system
Engagement Leaders	<ul style="list-style-type: none"> Primary point of contact with campus stakeholders Leads engagement teams: involved in planning, day-to-day oversight, communication and advocacy
<i>Engagement Teams: Advisors, Financial Aid, Faculty, etc.</i>	<ul style="list-style-type: none"> Engagement teams may be set up to facilitate specific initiatives or modules within the platforms Focus areas around planning, day-to-day oversight, communication, intervention strategy, and training
<i>Faculty Champion</i>	<ul style="list-style-type: none"> Responsible for faculty buy-in
Technology Leader	<ul style="list-style-type: none"> Demonstrates familiarity with IT systems infrastructure; drives technology initiatives forward Leads effort to ensure configuration and data extraction/transfer/maintenance go smoothly

Figure 9

Based on the current UTSA resources, the following resources should be allocated to ensure the student success recommendations can be implemented in an accelerated time frame.

2 FTE Requested – Student Success Technology Project Leads / Application Administrators

Primary Purpose

Leads process improvement facilitated by technology to enhance student retention, timely graduation, and student experience. The primary focus is on leveraging the UTSA Student Success Management System including training end users, rolling out new features, understanding all system functions, workflow, reports, and analytics that will drive measurable results in student success.

Responsibilities

- Primary owner of SSC Campus user activation, roles, permissions, and configurations
- Works with campus stakeholders to create new content for the Guide mobile app
- Publishes and maintains content for the Guide mobile app through content management system
- Serves as helpdesk to triage end user support issues and requests
- Determines if issues/questions related to internal UTSA issue or broader tool issue that needs to be communicated to EAB
- Works with UTSA stakeholders and EAB stakeholders to answer end user questions and adjudicate any technical or data issues
- Provides ongoing training to existing and new internal UTSA end users
- Stays up to date on new functionality of the tools and validates data as needed
- Participates in regular team meetings to ensure understanding of student success strategy and works to implement
- Participates in regular team meetings with EAB technology consultant

Student Success Management System

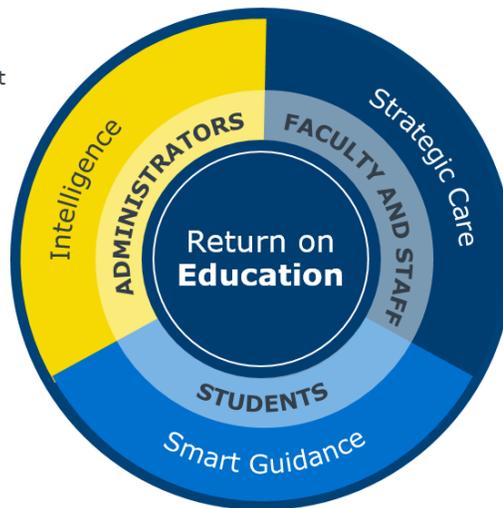
In addition to the numerous KPIs outlined throughout this plan, the success of the aforementioned 2018 and 2019 initiatives will be dependent on the Guide and SSC Campus technology. Leveraging these tools to optimal impact can be measured against the Student Success Management System's proven pillars and maturity curve below.

The Student Success Management System (SSMS) is an enterprise-level technology that links administrators, advisors, deans, faculty, other staff and students in a coordinated care network designed to help schools proactively manage student success and deliver a Return on Education. Through the UTSA partnership with EAB, UTSA has several technology tools that comprise our SSMS that will be leveraged to support our student success priorities.

The three pillars of the SSMS include intelligence, strategic care, and smart guidance.

Unlock the power of data analytics, bringing real-time insights and student success management **intelligence** to administrators and leaders

Figure 10



Create a connected and coordinated network of support for every student, enabling targeted intervention and proactive, **strategic care**

Provide curated, intelligent **guidance** at the most pivotal moments students encounter in college, simplifying and structuring the student journey to completion

The Student Success Management System Maturity Curve is a tool designed for members of the Student Success Collaborative to assess progress towards optimal adoption and strategic utilization of their SSMS. The greater breadth and depth of adoption, combined with strategic use and commitment to clear student success goals at all levels, leads to greater results. The work outlined in the student success priorities section will help UTSA to move up the Maturity Curve ultimately benefiting UTSA students, staff, and faculty.

	Adoption Stage	INTELLIGENCE	STRATEGIC CARE	SMART GUIDANCE
Level 7	Advanced	Continuous review of impact to make improvements	Case data evaluation to improve overall system effectiveness	Students are automatically corrected when they make a mistake
Level 6		Using data to track progress and/or accountability	Holistic collaboration between support offices managing at-risk cases	Guidance provided in real-time, including targeted interventions
Level 5	Intermediate	Using data to inform and drive broad, coordinated interventions	Cases and alerts referred to support offices	Guidance is customized to individual student needs
Level 4		Widespread use of data by individuals to drive day-to-day activity	Strategic campaigns target specific subpopulations	Self-serve guidance is personalized and proactive
Level 3	Basic	Sporadic use of data by individuals to drive day-to-day activity	Proactive, but generic appointment campaigns	Resources are centralized, uniform, and student friendly
Level 2		Leadership uses basic trends to inform decisions or strategy	Advisors using basic CRM functionality (notes, communications, scheduling)	Resources are centralized but inconsistent
Level 1	Pre	IR or Faculty run institution-specific trends	Advisors reference student record or profile during interactions	Scattered, inconsistent, and passive guidance
Level 0		Awareness of basic historical trends	No adoption	Self-service resources only accessible offline

Figure 11

SSMS 2018 Project Plan

Guide Project Plan

1.0: Content Development

July – August 2018

- 1.1 Confirm roles at UTSA that will comprise the Guide Content Management Team going forward
- 1.2 EAB to review content developed for New Students / Onboarding for Summer 2018
- 1.3 EAB & Guide Content Management Team to develop content strategy for AY 2018-19

August – September 2018

- 1.4 Guide Content Management Team to finalize content for AY 2018-19 (or at minimum, content for Fall 2018 semester)
- 1.5 Guide Content Management Team to specify which to-dos are of top interest to UTSA; i.e. which make a clear difference in student success and should be tracked by advisors in Campus or followed up on accordingly if students are or aren't completing them.
- 1.6 EAB to support specific content development for Fall 2018 on the back-end, including: (1) Updating the Intake Survey, (2) Configuring Quick Polls, (3) Creating any new categories requested for Guide content segmentation

August – December 2018

- 1.7 Guide Content Management Team to develop a calendar for when content will be reviewed and refreshed annually
- 1.8 EAB to continue to provide content management trainings, best practices, and/or resources
- 1.9 EAB to share Product Release Notes and advise UTSA accordingly when enhancements or new features become available

November – December 2018

- 1.10 Guide Content Management Team to review Guide Metric Reports and adjust content strategy based on student utilization / feedback
- 1.11 Guide Content Management Team, with support from EAB, to analyze impact of student completion rates of to-do's that play key roles in student success
- 1.12 EAB to support specific content development for Spring 2018 semester on the back-end, including: (1) Updating the Intake Survey, (2) Configuring Quick Polls, (3) Creating any new categories requested for Guide content segmentation
- 1.13 Recommended: student focus group among Guide adopters, to gain feedback and improve content and promotion strategy for Spring 2019

2.0 Promotion

2.1 Promotion Planning (Fall)

July – August 2018

- 2.1.1 Creation of UTSA Guide Promotion Team, or at minimum whom should be the main points of contact who can own Guide-related communications

2.1.2 EAB to facilitate a "Promotion Training & Planning" session to ensure the team is up-to-speed on promo best practices and EAB resources at their disposal, and to structure promo plans for AY 2018-19

2.1.3 Finalize promotional planning for Fall 2018 semester

2.2 Promotion Monitoring (Fall)

July – December 2018

2.2.1 EAB to share adoption reports w/ Promo Team and to hold semi-regular check-in calls w/ Promo Team (quarterly recommended for planning purposes)

2.2.1.1 Schedule quarterly check-in calls

2.2.2 UTSA Promo Team to inform EAB of ongoing or new Promo efforts

2.3 Promotion Strategy and Spring Planning

July – December 2018

2.3.1 EAB and UTSA Promo Team to jointly review adoption for Fall 2018 and plan promotional activities for Spring 2018 accordingly

2.3.2 EAB and UTSA Promo Team to structure a long-term, sustainable process for UTSA to plan and execute promotional activities

3.0 Impact and Evaluation

3.1 Metrics Reporting

July – December 2018

3.2.1 EAB to share monthly metric reports for Summer 2018 rollout, per UTSA's preference

3.1.1 UTSA to shape content strategy, promotion strategy, and/or internal processes according to adoption and utilization trends in the metric reports.

NOTE: Content & Promotion Teams should have at least one liaison between the two, so that their strategies can inform each other.

3.2 Holds

August – September 2018

3.2.1 UTSA to continue discussions internally regarding which Holds resolved during AY 2017-18 are of interest and value to the institution, in order to determine the impact of Guide expediting the hold resolution process (EAB has already shared robust data w/ UTSA)

3.2.1.1 Obtain list of all current holds. Review and filter according to registration holds or other negative impact. Ensure each hold has clear instructions and explanation

3.2.2 UTSA to report back to EAB which holds were of interest/value.

3.3 Impact Analysis

December 2018

3.3.1 EAB to support analysis of the impact of Guide utilization, ideally to develop case studies of Guide's impact on student success. This analysis should include the Hold Resolution Data analysis for Fall 2018, in the same fashion that analysis of data for AY 2017-18 was explored

Campus Project Plan

1.0 Product Release 18.1

1.1 Preparation

July – September 2018

- 1.1.1 EAB to provide a walkthrough of 18.1 functionality in the Training Environment prior to the August 15th release to UTSA training environment
- 1.1.2 UTSA to review 18.1 documentation in-depth
- 1.1.3 UTSA to explore 18.1 once released to Training Site on August 15th
- 1.1.4 UTSA to brainstorm, with input from EAB, which care units would be of interest to onboard and for what need/outcomes based on existing technology audits
 - 1.1.4.1 Make list of all care units, their current use of technology, whether they see students for walk-ins or appointments, and their level of interaction with other care units
- 1.1.5 EAB to advise on how to stage developing workflows for care units (potentially LEAD, SOAR, First Gen, and/or Transfer) in Training Site and how to train key end users accordingly

1.2 Roll-Out

August – December 2018

- 1.2.1 EAB to support set-up of care units in Production environment, depending upon how quickly care units need to gain access post- September 21st release to Production environment
 - 1.2.1.1 UTSA App admin configures permissions for new care units and set up locations and kiosks where necessary
- 1.2.2 New UTSA Care Units to leverage new functionality consistently, provide feedback and questions to EAB
- 1.2.3 EAB to provide recommendations on expanded onboarding of additional care units, pending input/feedback from initially onboarded care units

2.0 Progress Reports

2.1 Planning

July – September 2018

- 2.1.1 UTSA and EAB to review progress report philosophy and confirm strategy for Fall 2018 term (August 30)
- 2.1.2 UTSA to confirm which past Progress Reports will continue into AY 2018-19, and which Progress Reports that specific user groups (see below: LEAD, SOAR, etc) should be layered into this plan
- 2.1.3 EAB and UTSA to review alert and case configurations and make appropriate adjustments for Fall 2018
- 2.1.4 EAB to provide additional functionality training if needed from EAB
- 2.1.5 Develop plan for continued or expanded launch of Progress Reports at UTSA
- 2.1.6 UTSA to ensure appropriate training takes place for faculty for the Progress Report rollout process

- 2.1.7 UTSA to ensure appropriate training takes place for advisors for alerts and cases as they relate to Progress Reports

2.2 Launch

September – December 2018

- 2.2.1 UTSA and other agreed-upon stakeholders to support the launch of Progress Report process

2.3 Tracking & Reporting

September – December 2018

- 2.3.1 Track Progress Report responses by Faculty and ensure advisors follow up on reported risks according to agreed-upon plan
- 2.3.2 Track outcomes of Progress Reports and report them back to faculty and advisors

2.4 Evaluation

November – December 2018

- 2.4.1 EAB to facilitate review of Fall 2018 Progress Report plan to better inform process for Spring 2019

3.0 Onboarding Specific User Groups: LEAD, SOAR, First Generation & Transfer Office

- 3.1 UTSA to set up categories ideally (not just tags) for each student group (LEAD, SOAR, First Gen, Transfer) in Campus
- 3.2 Each program/office to work with Angie and Tammy to determine how their preferred Progress Reports for each user group will be incorporated into a Fall 2018 Progress Report calendar
- 3.3 Review Progress Report process with faculty members who will respond to the Progress Reports for each user group, and advisors who will be responsible for the follow-up
- 3.4 Review alerts and cases process with advisors as it relates to Progress Reports
- 3.5 Incorporate any new Appointment Campaigns of interest to these user groups into the Campaign Calendar for Fall 2018
- 3.6 EAB to share 18.1 Care Unit functionality/opportunities with each group to determine if their needs would call for setting up a new care unit in the near- or long-term
- 3.7 Begin to set up care units in Training and/or Prod and train end-users

Guide

1. EAB to offer a Guide Mobile App demo and a Guide Content Admin Tool training for all programs together
2. Each program to begin developing Guide content for the key tasks required in the onboarding process for their students
3. EAB to review the content being developed, provide feedback, and determine at what point in time Guide should start being promoted to each user group
4. UTSA to develop timeline for finalizing content and expanding Guide rollout to each user group over the course of Spring-Summer 2019

Peer Mentors

1. EAB and UTSA set up Peer Mentors with a specific role in Campus, so that they can provide support to students reported at-risk via Progress Reports

2. EAB conduct train the trainer trainings for Peer Mentors so that they understand the Early Alert process and other key functions that UTSA expects them to use, such as note-taking

4.0 Appointment Campaigns and Advising Reports

- 4.1 Confirm Campaign Calendar for AY 2018-19; ask any questions to EAB if needed
- 4.2 EAB and UTSA to partner to develop tracking process for campaigns
- 4.3 UTSA to track advisors' appointment campaign success
- 4.4 UTSA to report on outcomes of each Advising Campaigns to EAB
- 4.5 EAB to support analysis of impact of Campaigns, tying results ideally to ROI