

## University of South Florida Final iPASS Grant Report

### 1. Please restate your current iPASS grant vision. Describe activities and accomplishments to date, including where the work stands now in relation to your vision.

The University of South Florida's vision for iPASS is to bring all student support personnel into a coordinated network of providers that will contribute more timely and targeted support to at-risk undergraduate students to accelerate USF's path to state Preeminence and AAU eligibility. The original manifestation of that vision shifted paths early in the project from a narrowly tailored focus on academic tracking (e.g., ATLAS) to comprehensive holistic reform of student support services at multiple levels across the university. Most significantly, this represents a transition from a focus on reactive strategies applied to large student populations to a focus on effectively identify individual student needs in the moment of need. Previous activities and accomplishments connected to our iPASS work includes:

- A comprehensive on-site institutional advising program evaluation performed by consultants from the National Academic Advising Association (NACADA) that produced a gap analysis to engage stakeholders, catalyze the change process and prioritize areas of high-need within the advising community.
- The establishment of an ongoing process for the development of an institutional Academic Advising Strategic Plan:
  - During 2015, the original strategic planning process, guided by the then Vice Provost for Student Success, focused on the alignment of academic advising priorities with the USF 2013-2018 Strategic Plan.
  - In 2018, the Advising Assessment subcommittee of the University's Council on Academic Advising (CAA) attended NACADA's Assessment Institute to review and update the existing vision, mission and values to further connect with the case management model of student support developed during the iPASS project.
- Three and a half phases of collaborative product design and development work on the Archivm Insights Student Success dashboard. Product features include:
  - Creation of the student "Care Team" to indicate assigned personnel from various student services offices that are directly involved in the student's care and support;
  - Designation of a student success professional's (SSP) "Corral": a detailed list of all students where the SSP is an assigned member of the Care Team;
  - Enhanced student search functionalities that allow for the effective identification of student populations using over 25 different filters (e.g., cohort, residence hall, academic standing, excess credit hour indicator, student attribute such as Honors, etc.);
  - Creation of personalized watch list for student services professionals to flag one or more students for monitoring progress over an unspecified time;
  - Comprehensive interdepartmental referral workflow to escalate student needs and issues to the appropriate SSP;

- Case management workflow for the Academic Advocates (e.g., institutional-level case managers for undergraduate student success) to coordinate information and support for students at high risk for attrition;
- A student-facing portal for accessing and contacting the assigned Care Team;
- Centralized creation and storage of private and student-facing notes;
- Preliminary utilization reporting to evaluate engagement with case management model across multiple offices as well as by individual SSPs;
- A graduation dashboard (e.g., Finish in Four) to record and track essential data elements specifically identified as integral for improving four-year graduation rates; and
- Integration of a “Refer Students” link within the University’s learning management system CANVAS to allow faculty to send referrals directly to academic advocates and advisors without needing to sign-on into Archivm.
- Scaling the case management model for student support across campuses and offices:
  - The Office of Academic Advocacy (OAA) expanded service delivery from graduating students to support first year persistence and recently evolved to include a focus on transfer student success.
  - Initial involvement in the case management model centered on college-based academic advising and OAA, but now includes New Student Connections, Residential Education, the Academic Success Center and other offices.
  - USF St. Petersburg and Sarasota-Manatee campuses have developed case management models of student support engaging multiple student services offices across their own campus locations as well as implementing the Archivm Insights dashboard.
- A number of USF personnel have been invited to share presentations on the case management model and technology development at regional and national conferences, including EDUCAUSE, NACADA, and the National Symposium on Student Retention.
- Development and revision of academic policies to build an organizational infrastructure designed to optimize undergraduate student success.
- Creation of an Advising Technology professional learning community (PLC) to directly engage the advising community around peer-to-peer technology training, support and strategies of reflective practice.

Current work is focused on the continued development of infrastructure designed to stabilize all past change efforts and provide a framework for continuing student success reform. Through the summer of 2018, the members of the Advising Technology PLC will provide outreach to advising community and facilitate an advising climate survey to review attitudes and opinions about advising practice at the college level. Additional work will continue on the advising strategic plan to identify advisor and student outcomes aligned with the mission, as well as the identification of consistent funding earmarked for ongoing development of Archivm Insights.

## **2. What achievement are you most proud of in your iPASS work?**

During the iPASS work, it has been apparent that the entire USF community, from the individual offices within the division of Student Affairs and Student Success to those working in academic colleges, has a shared and visible commitment to transforming the institution and striving for excellence in student success. This is exemplified by the Persistence Committee, which has grown to represent over 20 different student service areas; every semester a new office reaches out to join the important work of this team. It is this commitment that has not only led to record-setting performance metrics at USF Tampa in second-year retention (90%), the six-year graduation rate for first-time in college (FTIC) students (71%), and, for the first time, the four-year FTIC graduation rate (59.6%), but most importantly, an institutional culture that places the student at the center of everything we do. For a synthesis of our iPASS work, visit the USF iPASS webpage at [www.usf.edu/student-affairs-success/ipass](http://www.usf.edu/student-affairs-success/ipass).

## **3. What measures are you using to track your progress (e.g. adoption, satisfaction, improvements in completion, etc.) and what outcomes are you seeing? Please be specific.**

The University of South Florida's vision for the iPASS grant centers on the development of institutional level of coordination for communication and outreach among undergraduate student service providers. Ongoing assessment of this initiative's progress involves seeking positive trends in the following metrics:

1. Increase the frequency of communication between units (metrics: number of referrals opened, number of cases opened, and trends over time showing the increase in utilization of referrals and cases);
2. Improve the quality of communication between student services units by tracking the nature and/or content of messaging (metrics: trends in referrals and cases by tags); and
3. Establish more coordinated outreach between student services units to ensure the correct office delivers needed interventions to students (metrics: number of different roles submitting referrals, and number of different roles receiving referrals).

For metric 1, we have monitored the number of referrals and cases opened within the Archivm Insights application since Spring 2017. Activity has steadily increased each academic term (Figure 1) demonstrating higher levels of engagement with the technology-facilitated communication.

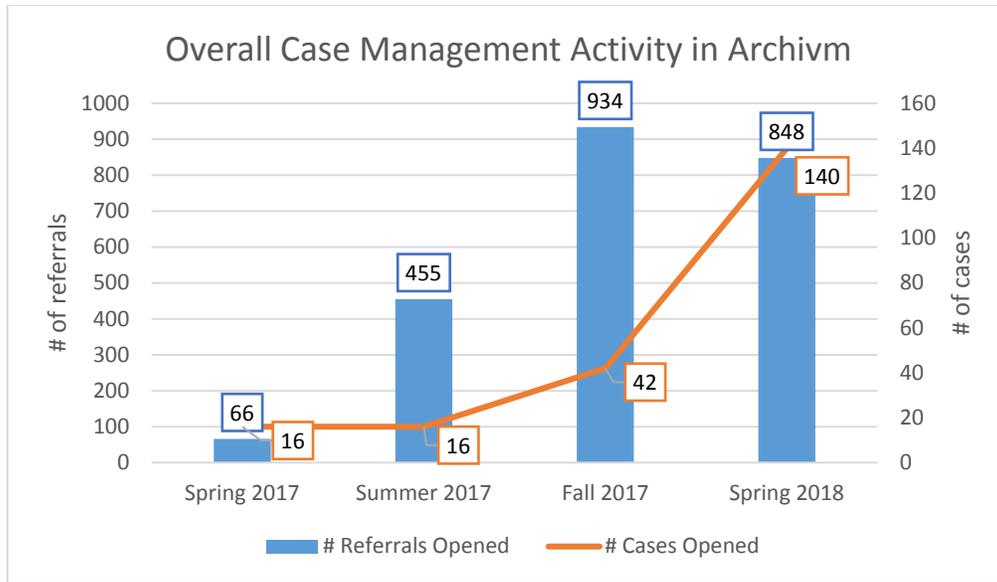


Figure 1. Overall case management activity using communication workflow in Archivm.

The second metric reflects on improving the quality of communications between units to ensure the correct department or individual is alerted of an at-risk student or of a student’s need for assistance. To support more transparent and action-oriented communications, referrals are flagged with “tags” selected by the student services professional who initiates the referral in order to better identify the issue at hand. Data on tag usage shows a marked increase in tags during the Spring 2018 semester (Figure 2), with “Academic” category representing over half of tags used (56.6%). There was also a 200% increase in the number of tags used from Fall 2017 to Spring 2018; however, the cause is still unclear.

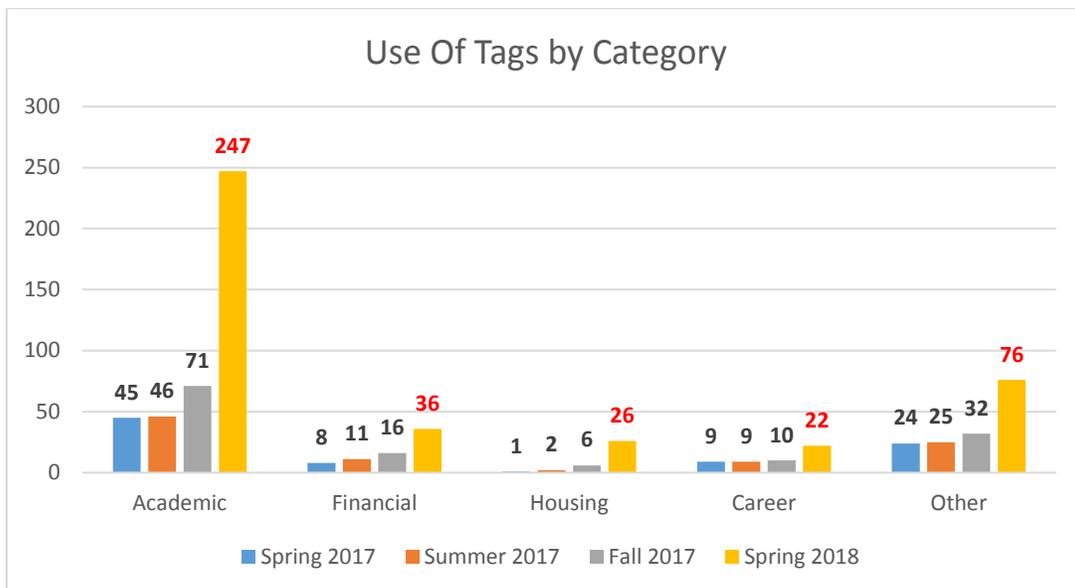


Figure 2. Number of tags by category each semester

The final outcome centers on improving communication between student support offices by demonstrating increased diversity in the different offices initiating and receiving referrals. More specifically, the principles of case management strategy are rooted in how effectively students are connected to the right office, so multiple offices should be involved in both sending and receiving referrals. Data shows that on average academic advisors and advocates account for over 75% of referral activity (Table 1 and 2); however, there are signs of improvement.

In 2017-2018, 10% of referrals sent originated from peer advisors (e.g. Office of New Student Connections), Residential Life, Financial Aid and Career Services – none of which had any referral activity during the 2016-2017 academic year. There is also an indication of reduced activity by the Academic Success Center, Academic Foundations instructors and Academic Success in Athletics; this trend needs to be explored in more detail. The most promising trend appears in Table 2 which details where referrals are sent. Although during the 2016-2017 over 70% of referrals were sent to one office (e.g., OAA), the following year shows seven different areas (excluding OAA) receiving over 50% of all referrals.

	Academic Advisors	Academic Advocates	Academic Success Center	Career Counselor	Director Level
2016-2017	38.2%	51.6%	0.9%	0.0%	8.0%
2017-2018	42.4%	34.6%	0.2%	0.2%	13.3%

	Financial Aid	Library	Peer Advisor	Residential Life	Academic Foundations (1st yr seminar)	Athletics
2016-2017	0.0%	0.0%	0.4%	0.0%	0.4%	0.4%
2017-2018	0.3%	0.0%	4.6%	4.2%	0.0%	0.0%

Table 1. Percentage of referrals *sent* each academic year by role type.

	Academic Advisors	Academic Advocates	Academic Success Center	Career Counselor	Director Level
2016-2017	13.8%	70.7%	0.4%	0.4%	12.6%
2017-2018	43.5%	41.2%	2.6%	1.4%	5.7%

	Financial Aid	Library	Peer Advisor	Residential Life	Academic Foundations (1st yr seminar)
2016-2017	1.7%	0.0%	0.0%	0.0%	0.4%
2017-2018	0.0%	0.2%	1.7%	0.9%	0.3%

Table 2. Percentage of referrals *received* by role type each academic year.

Assessment work will continue with a shift towards qualitative assessments to consider the change in perspectives within the student services community regarding how to support

student success as well as a more granular look at how case management impacts the student experience in lieu of using the larger institutional metrics.

**4. What does the student experience of advising and planning look like now after your iPASS work? What are the biggest changes from three years ago?**

The most substantive change in the student experience was to establish a campus culture that creates an environment where all students, regardless of differences in backgrounds, experiences and resources, believe the USF community as a whole is committed to student welfare. This is exemplified by more personalized communication and a heightened sense of awareness and empathy amongst staff about what students' experience – whether the employee delivers front-line customer service or is the chief academic officer for the USF System. For example, the Office of New Student Connections and Residential Education have utilized the case management structure to integrate one-on-one conversations with students to create intentional opportunities to connect with support. This awareness allows staff to truly see the needs of the community they serve in order to respond effectively and expediently. Proactive engagement also results in an evolved student experience where needs are anticipated instead of relying on the student to independently seek assistance.

**5. Have any major factors or conditions, such as staffing or funding, changed over the grant period? How have these changes affected the work?**

During the entire grant period, there have been a number of reorganizations including the integration of the Student Affairs and Student Success units as well as changes in senior leadership roles within the Office of Undergraduate Studies and other departments. We have focused on obtaining funding for technology development in a competitive budget environment and have been successful using short-term Tech Fee funding and additional investments; however, dedicated funding has not yet been allocated for ongoing work. Within the information technology unit, agile and scrum were adopted as the institution's new business process for doing systems work which has required considerable training, retraining and acclimation across campus. Finally, the state of Florida has applied continuous pressure to its postsecondary institutions by implementing (and repeatedly changing) an array of performance-based funding metrics in conjunction with pre-eminence measures which are designed to enhance quality across institutions in the state. Keeping pace with changes to these external requirements while maintaining a balanced level of commitment to our own internal goals for student success continues to be challenging. It is the variability in these factors that serves as a stark reminder that students are, and should remain, the center of our work.

**6. What has been the most challenging aspect of your iPASS work over the last three years?**

The most challenging aspect of the iPASS work has been scaling up technology adoption and the case management model without the time to plan for scaling. This is made particularly difficult in a loosely-coupled, decentralized organizational structure. Prior to the development

of Archivm, advising and other student services offices utilized multiple student success technologies but few to none have been integrated into a single system or access point. Creating a unified model of student support requires more than technology, and often there was an overreliance on the belief that the system itself would bring about needed changes to processes and attitudes. Throughout the iPASS work, project leaders have also struggled to find the right balance of participation to represent the diverse perspectives and needs of the student success community with limited time and resources. Lastly, an integral element of this positive change effort is the ability to communicate actionable feedback; this continues to require a shift in perspective for many front-line users more comfortable with saying “I don’t want/like this” than engaging in reflective practice.

**7. Briefly describe major activities planned or implemented to ensure that your work is sustained, and you have reached critical mass needed to achieve sustainable change. In your response, please note how you are continuing to build and maintain *true* urgency for your iPASS work on campus.**

Currently Information Technology is in conversations with executive leadership to negotiate reoccurring funds to support the long-term development of the Archivm Insights dashboards. Securing long-term funding will allow project leaders from the functional offices and product owners from IT to choreograph multiple projects earlier in the design process. Ongoing work on the strategic plan for the academic advising community is an important part of the continued push towards technology-mediated advising practice, as is the Advising Technology professional learning community which serves as mechanism for more centralized, two-way communication. The PLC is also an essential component of another vitally important sustainability effort: education and data literacy. PLC members will continue with peer-led engagement at the college-level to support the use of predictive modeling and proactive outreach resources. The Student Affairs and Student Success unit will continue to develop centralized resources to educate student support professionals about case management and provide ongoing training to maximize technology utilization.

**8. Aside from funding, in what areas or on what issues do you need additional support as you look to the future of your work?**

We need to continue to improve our use of assessment. Instead of considering assessment as an afterthought using reactive measures, we need to transition to using leading measures throughout program design and project implementation to better inform our work. Additionally, we need to use blended methodology that incorporates quantitative and qualitative data points.