

IPAS2 Application

Organizational Information

Institution Legal Name: _____

Tax code designation under which your organization operates (e.g., 501(c)(3), 501(c)()) and number (Employer Identification Number EIN): _____

The organization is:

Exempt from United States Federal income tax under section 501(c)(3) of the United States Internal Revenue Code of 1986 (the "Code") and not a private foundation;

Exempt from United States federal income tax under Section 501(c)(3) of the Code and a private foundation;

Exempt from United States federal income tax under a section of the Code other than 501(c)(3) (e.g., Section 501(c)(4) or 501(c)(6)).

If applicable, please indicate which section applies to your organization _____;

Not a tax-exempt organization under the Code.

If applicable, please indicate the type of organization and place of incorporation;

A United States government unit.

If so, please describe _____;

A state, tribal, or local government unit.

If so, please describe _____;

Address: _____

City: _____ State: _____ Zip+4: _____

Telephone: _____

Website: _____

Institution type: _____

President of Institution: _____

Phone: _____

Name of president's administrative assistant: _____

Email address of president or president's assistant: _____

Leader College

Name of Leader College: _____

Proposal

Lead Contact

Lead contact person: _____

Lead contact title: _____

Lead contact email: _____

Lead applicant office phone: _____ Lead applicant mobile phone: _____

Lead contact bio : _____

IT Contact

IT Contact: _____

IT Contact title: _____

IT Contact email: _____

IT contact bio: _____

Institutional Research Contact

Institutional Research contact name: _____

Institutional Research contact title: _____

Institutional Research contact email: _____

Institutional Research contact bio: _____

Letter of Support from institution's president: _____

IPAS2 Budget: _____

Narrative 1, Academic Affairs and Student Advising: _____

Narrative 2, Information Technology: _____

Narrative 3, Institutional Research: _____

Narrative 4, STEM Challenge Questions: _____

IPAS Grant Narrative 1

Completed by: Dr. Ralph Wilcox, Provost and Executive Vice President; Dr. Paul Dosal, Vice Provost for Student Success; Dr. Bob Sullins, Dean for Undergraduate Studies

1. Why are you seeking support for an IPAS project? What needs does IPAS address and how will it do so?

Since the formation of a Student Success Task Force in 2009, the six-year graduation rate at the University of South Florida has climbed from 48 percent to a 67 percent and the four-year graduation rate has climbed from 25 percent to 43 percent, rates of improvement that few institutions can match. However, USF intends to improve on these and other performance metrics. As part of its continuing Student Success Initiative, USF will fully implement an academic tracking system, Advanced Tracking Leading to Academic Success (ATLAS), that will empower undergraduate students to develop customized academic plans leading to the degrees and careers of their choice. Unfortunately, the implementation of ATLAS has been slowed by a number of factors, including fiscal constraints, technical issues, and business practices that have been slow to adapt to new technology and processes. The result is that the USF tracking system is incomplete, lacking the technological attributes, personnel, and practices required to function properly. To fully implement ATLAS we need to correct system problems and enhance business practices. Today our data-driven advising activities are built from historical reports and generally include only students already off-track or at-risk of failure. ATLAS is envisioned as a suite of tools and practices that will allow advisors to intervene *before* students veer off track. With IPAS support, USF will complete ATLAS by incorporating recently implemented predictive analytics platforms (Illume and Inspire for Advisors, by Civitas) into its advising practices or add additional tools (such as Degree Map, also by Civitas) into the advisors' tool kit.

2. Please describe advising and student support at your institution. To what extent have you already engaged in advising support of IPAS implementation? How will the institutional processes and procedures related to advising and student support change if IPAS is successful? How will data and predictive analytics inform your efforts?

In 2007, USF transitioned from faculty advising to a professional academic advisor model and currently has just over 90 academic advisors across 11 colleges and units. Our academic advising is centralized at the college level. Each college has a director or coordinator with responsibilities for administering that area's academic advising. To complement the college-level centralization, Undergraduate Studies serves a dual leadership and support role of academic advising across the university to administer and coordinate institution-wide advising initiatives. They include our Academic Advisor Career Path, on-going efforts to implement an academic planning/tracking system in Degree Works, and more recent initiatives with Civitas Inspire for Advisors. Even with limitations of systems and resources, academic advisors conduct regular targeted outreach to students and also meet with students who schedule appointments via our eScheduler system. Our advising approach is developmental, designed to engage students in planning so they can meet personal and professional goals. We adhere to an appreciative advising model to frame our discussions and build trusting

relationships. Every semester, our advisors use intrusive or proactive advising strategies to connect with and support our identified at-risk student populations.

Over the last three years, USF has been focused on establishing a student academic tracking system in Degree Works along with supporting policies and practices that would allow advisors to monitor students along a degree path, identify at-risk students, and redirect students as necessary to keep them on track to timely degree completion. Academic advisors have invested significant time and effort in a university-wide effort to develop a more effective advising system that would allow them to conduct targeted outreach and support.

The ultimate goal is to elevate not only the academic advisor's role in the Student Success movement but also the students' roles in developing their own academic plans. By empowering students to develop their own semester-by-semester plans and monitor their own progress, advisors will find themselves with more capacity to engage in more comprehensive developmental advising with the students most in need of such services. These complex issues often cross departmental and unit boundaries so our plans for ATLAS also involve collaboration and sharing of information among many student support staff such as academic advisors, career counselors, resident assistants (RAs), tutoring and learning support staff, and potentially others.

Over the last year we have implemented two predictive analytics models in academic advising: one constructed in-house and the other developed by Civitas (Inspire for Advisors). By fully implementing ATLAS, advisors can better meet our mission by more enhanced methods of engaging students in planning for graduation and career success; communicating effectively and timely with students; increasing our availability to assist our students; and identifying students who are in need of assistance before it is too late to provide timely and effective support. This IPAS proposal would allow for integrating predictive analytic models into meaningful academic advising practice, with a focus on targeted support and outreach even prior to a student becoming off track of their academic plans.

3. Please select one word to describe how change happens at your institution. Why did you select this word?

Collaborative. Our accomplishments to date are the product of a university-wide Student Success movement that has engaged colleges, departments, and support offices across campus. No single office or program is responsible for the dramatic increases in the six-year graduation rate. Through a deliberate, strategic, and collaborative effort that has functioned more like an institutional social movement than a specific program aimed at targeting a specific group of students, USF has managed to raise the graduation rate for all students and eliminated the racial and ethnic gaps more prevalent in other schools. Collaboration produced these significant results.

4. Who will lead your IPAS project? Why this leader or group of leaders? What role will the college's senior leadership play in the process, and why?

The Degree Works & Tracking Steering Committee, chaired by the Vice Provost for Student Success and co-chaired by the Vice President for Information Technology, will lead this IPAS project. Given the collaborative nature of change at USF, this committee is ideally positioned to carry out this project. It includes representatives from all stakeholders in this effort, including Student Success, Information Technology, Institutional Research, Undergraduate Studies, Academic Advisors, Admissions, and the Registrar. The committee has supervised the implementation of the new degree audit (DegreeWorks) and has been developing ATLAS from 2011 to the present. This committee is prepared to accelerate and complete the full implementation of the IPAS tool at USF.

- 5. Please identify the IPAS system(s) you need to implement for this project and the functionalities you need to implement. As indicated in the RFP, institutions that are pursuing the use of all three functionalities will be preferred: (a) education planning (b) counseling and coaching (c) risk targeting and intervention. Please note, The choice of systems you indicate here may change during the planning year as you learn more about the capabilities of possible systems.**

ATLAS is a broad set of policies, practices, and programs that includes academic planning, counseling and coaching, and risk targeting and interventions. To implement ATLAS, we will need to complete, perfect, and possibly supplement the systems and practices in development or under consideration. The tools currently available to advisors, staff, and students currently include Degree Works, Banner, Illume and Inspire for Advisors (both predictive analytics platforms acquired from Civitas Learning), and a home grown tracking tool within Degree Works. Following a year of planning and consultation, we may elect to add Degree Map from Civitas to this package.

The functionalities provided by this platform, will likely facilitate transfer student recruitment and articulation efforts currently underway between USF and the five state colleges (formerly community colleges) in the Tampa Bay area. Transfer student articulation processes are slow, cumbersome, and occasionally inaccurate, making it difficult for students to navigate the path from a state college to completion at USF. Thus, all three functionalities: planning, counseling and coaching, and risk targeting and intervention would be greatly increased for transfer students.

- 6. Please describe the project's implementation plan. What will departmental roles and responsibilities look like, what is your proposed timeline for work, etc.? Summarize your plans or strategies for successfully executing your department's responsibilities.**

Year one: Dedication to planning and building infrastructure. The Steering Committee will coordinate efforts to engage in the internal studies required to identify and resolve systemic issues and business practices that have impeded the full deployment of our tracking system. During this year of study, external consultants will be engaged to facilitate the internal audits and deliberations that will be required to help the university community articulate a comprehensive vision for its tracking program. This vision includes a decision on whether Degree Map adds the functionality that is missing from ATLAS, our current tracking system.

Years 2 and Year 3: Focus on professional development for counseling, coaching, and risk management. We will implement a broad array of professional development activities for the personnel associated with the tracking system, including but not limited to, information technology personnel, academic advisors, counselors, and admissions advisors. Effective utilization of the tools in house or likely to be developed (most notably Degree Map) requires a change in culture and practice, as we've already discovered with the implementation of the Illume application. To make full and effective use of this Big Data tool, the university has formed an Academic Analytics Team (A-Team) to coordinate the implementation and use of the insights gleaned from the instrument. Similarly, the tool box that academic advisors and counselors will have at their disposal requires advanced training and professional development activities to create and sustain an effective tracking tool. Through this IPAS grant we hope to design and assess interventions to promote student persistence and retention.

7. What concerns do you have and what challenges do you foresee in implementing and encouraging end user-adoption of IPAS? Summarize your plans or strategy to develop plans for addressing these challenges.

In the early stages of implementing ATLAS at USF, academic advisors who are the primary end-users, were not fully engaged in the design process. For the past year we have been engaging the advisors more directly in the design effort to ensure that the final product will meet their needs. The process is incomplete, however, and this IPAS project gives USF a tremendous opportunity to design the tools and practices that will empower advisors to carry out the critical tasks assigned to them.

8. Describe the ambitious goals you plan to set for your college for this IPAS project. How will you measure the impact of IPAS at your college? What types of data are available for assessing IPAS outcomes Consider academic records(i.e. student-unit record systems) as well as alternate forms of IPAS-related information (i.e. technology usage, vendor data). To what extent are these data available longitudinally and/or at the student-unit level?

By 2018, USF will have fully implemented ATLAS. The implementation of ATLAS will contribute toward the achievement of several important performance targets, including a 70% six-year FTIC graduation rate, 50% four-year FTIC graduation rate, 90% FTIC retention rate (1st to 2nd year); 70% four-year transfer student graduation rate. These data are available longitudinally by college, and also disaggregated by race, ethnicity, gender, and socio-economic status.

The metrics we will use to measure the impact of ATLAS, include but are not limited to the following:

(1) Number of FTIC students who have developed an academic plan in ATLAS; **(2)** Number of transfer students who have utilized an ATLAS tool to develop their own academic path to completion at USF; **(3)** Number of interventions prompted by ATLAS; **(4)** Utilization rate of ATLAS by academic advisors and **(5)** Utilization rate of ATLAS by students. Data collected would identify trends on why students leave and could potentially determine if there are attrition trends for specific populations of students. It is also worth noting that data will be student level data from our Student Information System, Learning Management System, as well as data from surveys and advising and tracking tools.

IPAS Grant Narrative 2

Completed by: Sidney Fernandes, System Vice President/CIO, Information Technology

1. Why are you seeking support for an IPAS project? What needs does IPAS address and how will it do so?

Although we have already done a significant amount in the development of ATLAS, our institution and our systems were probably not fully prepared to implement tracking or the tools associated with it, namely Illume and Inspire for Advisors. Our student information system, Banner, requires some enhancements and refinements, given that it is the source of data for the predictive analytics platforms. With an IPAS grant, we will be able to pause the rapid implementation process and implement some of the enhancements and improvements that our systems needs. Thankfully, we have already identified the most serious challenges and now have a plan for going forward. Funding for an IPAS project would enable our students and advisors to have the technology needed to keep all students, including at-risk individuals, on the path to graduation and achieving post-graduation career goals.

3. Please select one word to describe how change happens at your institution. Why did you select this word?

Collaborative. Student Success is more of a social movement at USF rather than a single institutional program. Information Technology has been a critical partner in this movement, providing services to the Office of Student Success as well as all colleges, student programs, and academic departments. USF has an institutional commitment to student success that is reflected through our current achievements.

4. Who will lead your IPAS project? Why this leader or group of leaders? What role will the college's senior leadership play in the process, and why?

Because we operate within a culture of collaboration and information sharing, the Degree Works & Tracking Steering Committee will play a pivotal role. This committee is made up of a highly diverse group with representatives from Student Success, Information Technology, and Admissions, to name a few. It exemplifies collaboration and puts it into practice.

5. Please identify the IPAS system(s) you need to implement for this project and the functionalities you need to implement. As indicated in the RFP, institutions that are pursuing the use of all three functionalities will be preferred: (a) education planning (b) counseling and coaching (c) risk targeting and intervention. Please note, The choice of systems you indicate here may change during the planning year as you learn more about the capabilities of possible systems.

ATLAS is the framework that integrates the three elements. It is a diverse set of policies and practices that include planning, counseling and coaching, and risk targeting and intervention. Tools include DegreeWorks, Inspire, Banner, and Illume to name a few. ATLAS is supported by the Civitas platform.

6. Please describe the project's implementation plan. What will departmental roles and responsibilities look like, what is your proposed timeline for work, etc.? Summarize your plans or strategies for successfully executing your department's responsibilities.

Year one will consist of planning and building infrastructure. Information Technology personnel will engage with external consultants and internal stakeholders to identify and fix systemic issues. Years 2 and 3 will be dedicated to developing professional development for counseling, coaching, risk management, and I anticipate that IT personnel will be fully engaged in these professional development activities as well.

7. What concerns do you have and what challenges do you foresee in implementing and encouraging end user-adoption of IPAS? Summarize your plans or strategy to develop plans for addressing these challenges.

Our goal in IT is to ensure that end users, in this case academic advisors, are satisfied with the tools we deliver. The absence of advisor input in the initial design of ATLAS has already been corrected. The on-going challenge for IT is to balance and occasionally mediate the interests of end users, but the collaborative institutional culture at USF facilitates this process.

8. Describe the ambitious goals you plan to set for your college for this IPAS project. How will you measure the impact of IPAS at your college? What types of data are available for assessing IPAS outcomes Consider academic records(i.e. student-unit record systems) as well as alternate forms of IPAS-related information (i.e. technology usage, vendor data). To what extent are these data available longitudinally and/or at the student-unit level?

ATLAS will be fully implemented by 2018 and will be critical in achieving several ambitious performance goals, most notably including a 70% six-year graduation rate, 50% four-year graduation rate, and 90% retention rate. The metrics we will use to measure its impact include the number of FTIC students and transfer students who have used ATLAS to develop their academic plans, the rate academic advisors use ATLAS, and the rate that ATLAS has successfully identified at-risk students before they become at-risk for graduation. The predictive models created by IPAS implementation would help us identify students who are experiencing financial hardships and allow for the implementation of exit surveys for outprocessing students. Data will be student level data from our Student Information System, Learning Management System, and advising tools.

IPAS Grant Narrative 3

Completed by: Valeria Garcia, Ph.D. – Assistant Vice President Decision Support (IR)

1. Why are you seeking support for an IPAS project? What needs does IPAS address and how will it do so?

USF is committed to student persistence, timely degree progression, and successful graduation. In order to continue success in these areas, there is a need for institutional data to inform daily practice. In this era of fiscal constraints and diminishing resources, there is a need for both financial and human resources to support the predictive analytics and systems that generate the communication and alerts the personnel on the ground need to enact interventions. The communication between the Office of Decision support to Undergraduate Studies and the academic advising community needs to be targeted and strengthened to achieve our student success goals. Funding for an IPAS project would greatly assist in all of these areas and enhance our ability to ensure all students stay on the path to graduation.

3. Please select one word to describe how change happens at your institution. Why did you select this word?

Collaborative. The institutional research capacity at the University of South Florida is dependent on a strong collaborative environment which allows for collegial dialogue and partnership. The Office of Decision Support, as the official data source for the university, strengthens its ability to inform decision makers with information and data through the support of collaboration with other key units.

5. Please identify the IPAS system(s) you need to implement for this project and the functionalities you need to implement. As indicated in the RFP, institutions that are pursuing the use of all three functionalities will be preferred: (a) education planning (b) counseling and coaching (c) risk targeting and intervention. Please note, The choice of systems you indicate here may change during the planning year as you learn more about the capabilities of possible systems.

ATLAS, a diverse set of policies and practices that include planning, counseling and coaching, and risk targeting and intervention, is the framework that integrates these elements and is supported by the Civitas platform. Tools include DegreeWorks, Inspire, Banner, and Illume, among others. The role of the Office of Decision Support is to ensure the accuracy of the data reporting, advise end-users, and support the decision-making process with additional research and analysis. Furthermore, the Office of Decision Support collaborates with core university units to elevate and augment focused research and analysis.

6. Please describe the project's implementation plan. What will departmental roles and responsibilities look like, what is your proposed timeline for work, etc.? Summarize your plans or strategies for successfully executing your department's responsibilities.

We have designed a three year timeline for implementation. Year one will be dedicated to planning and building infrastructure. External consultants will also be used. Years 2 and 3 will focus on professional development for counseling, coaching, risk management; this period will allow for advancing continued research around student success, as well as implementation of strategies that align with findings from year one. This three year plan creates a more formalized partnership between the offices of Decision Support, Student Success, Undergraduate Studies Information Technology, Admissions, and the Registrar, creating conditions for a successful implementation plan.

8. Describe the ambitious goals you plan to set for your college for this IPAS project. How will you measure the impact of IPAS at your college? What types of data are available for assessing IPAS outcomes Consider academic records (i.e. student-unit record systems) as well as alternate forms of IPAS-related information (i.e. technology usage, vendor data). To what extent are these data available longitudinally and/or at the student-unit level?

By 2018, USF will have fully implemented ATLAS, defined as the set of policies, practices, and programs that are used by advisors and students to develop and monitor progress toward degree completion on customized academic paths. The implementation of ATLAS will contribute toward the achievement of several important performance targets, including a 70% six-year graduation rate, 50% four-year graduation rate, and 90% retention rate (1st to 2nd year).

The metrics we will use to measure the impact of ATLAS, include but are not limited to:

- 1) Number of FTIC students who have developed an academic plan in ATLAS
- 2) Number of transfer students who have utilized an ATLAS tool (such as Degree Map), to develop their own academic path to completion at USF
- 3) Number of interventions prompted by ATLAS
- 4) Utilization rate of ATLAS by academic advisors
- 5) Utilization rate of ATLAS by students

There are, however, more ways that IPAS implementation would be able to forecast other issues. They are as follows:

Retention Rate: USF aspires to reach a 90% first-year retention rate. There is a first-year persistence model that predicts which first-year students are more likely not to persist into their second year. The list of these students is sent to first-year seminar instructors, academic advisors, and housing personnel so that these entities can provide intentional support and interventions for these students. The first-year retention advocate in Undergraduate Studies is working closely with these entities to discuss the predictive model and intervention strategies. The Office of Decision Support and Undergraduate Studies have begun to collaborate on an official exit process for students who voluntarily leave the university. This would include an official form as well as a survey. This survey would help the university collect information on why students leave. It could help determine if there are attrition trends for specific populations of students. This information can highlight areas of improvement for the university.

Struggling Students: The university could benefit from an early alert system that would flag students with negative attendance patterns and insufficient grade performance. At this time, the earliest indicator of a student's academic performance is through mid-term grades that are reported for 1000, 2000, and 3000-level courses by the 8th week of class. Illume can give us real-time reporting for students so we can see classroom trends earlier than the 8th week of class and provide interventions when there is still time for the student to enact meaningful change.

Data collected and assessed will be student level data from our Student Information System, Learning Management System, as well as data from surveys and advising and tracking tools.

Prepared by Alexis Mootoo

Submitted Date June 17, 2015

ENTER BASIC BUDGET INFORMATION

1) Enter Project Information

Organization Name	University of South Florida
Project Title	IPAS2 GRANT

2) Enter Budget Periods: You may enter one or as many budget periods as needed for the project. Budget periods may span any number of months, including a year (12 months). Budget Period 1 will not begin until the grant agreement is countersigned.

	Start Date	End Date	# of months
Budget Period 1	09/01/15	08/31/16	12
Budget Period 2	09/01/16	08/31/17	12
Budget Period 3	09/01/17	08/31/18	12
Budget Period 4			0
Budget Period 5			0

3) Indirect Cost %

Requested Indirect Cost %	10%
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If you wish to include indirect costs, please discuss this with your program officer. Please see item I. Indirect Costs on the Glossary tab for general classifications and a link to the foundation's published indirect cost policy.

Reminder: Information should only be entered into the yellow input cells.

Budget Summary				BUDGET PERIOD 9/1/2015 - to - 8/31/2016			BUDGET PERIOD 9/1/2016 - to - 8/31/2017			BUDGET PERIOD 9/1/2017 - to - 8/31/2018			BUDGET PERIOD 1/0/1900 - to - 1/0/1900			BUDGET PERIOD 1/0/1900 - to - 1/0/1900			Total Project Budget					
PERSONNEL DETAIL:				Total	EDUCAUSE		Budget Balance		Total	EDUCAUSE		Budget Balance		Total	EDUCAUSE		Budget Balance		Total	EDUCAUSE		Budget Balance		
Employee Name - Title	Annual Salary	Benefits %	Annual S&B Inflation %	%	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%	Amount	
1	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
2	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
3	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
4	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
5	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
6	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
7	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
8	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
9	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
10	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
11	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
12	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
13	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
14	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
15	-	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
DIRECT COSTS SUMMARY:																								
Personnel and Benefits Total																								
Consulting & Professional Fees				46,350	100%	46,350	0%		38,182	100%	38,182	0%		34,817	100%	34,817	0%		119,349	53%	100%	119,349	0%	
Materials & Supplies																								
Computers & Equipment (not calculated in total indirect costs)																								
Printing & Publications																								
Travel & Accommodations				9,272	100%	9,272	0%	6,440	100%	6,440	0%								15,712	7%	100%	15,712	0%	
Conferences, Conventions, Meetings				8,560	100%	8,560	0%	8,560	100%	8,560	0%			8,560	100%	8,560	0%		25,680	11%	100%	25,680	0%	
Direct Facilities (please review indirect cost policy guidelines)																								
Other Direct Costs				4,000	100%	4,000	0%	15,000	100%	15,000	0%			24,805	100%	24,805	0%		43,805	19%	100%	43,805	0%	
Total Direct Costs				\$ 68,182	100%	\$ 68,182	0%	\$ 68,182	100%	\$ 68,182	0%	\$ 68,182	100%	\$ 68,182	0%	\$ 68,182	100%	\$ 68,182	0%	\$ 204,546	91%	100%	\$ 204,546	0%
Subgrants to Organizations																								
TOTAL DIRECT COSTS & SUBGRANTS				\$ 68,182	100%	\$ 68,182	0%	\$ 68,182	100%	\$ 68,182	0%	\$ 68,182	100%	\$ 68,182	0%	\$ 68,182	100%	\$ 68,182	0%	\$ 204,546	91%	100%	\$ 204,546	0%
Total Indirect Costs				\$ 6,818	100%	\$ 6,818	0%	\$ 6,818	100%	\$ 6,818	0%	\$ 6,818	100%	\$ 6,818	0%	\$ 6,818	100%	\$ 6,818	0%	\$ 20,455	9%	100%	\$ 20,455	0%
TOTAL PROJECT COSTS				\$ 75,000	100%	\$ 75,000	0%	\$ 75,000	100%	\$ 75,000	0%	\$ 75,000	100%	\$ 75,000	0%	\$ 75,000	100%	\$ 75,000	0%	\$ 225,001	100%	100%	\$ 225,001	0%

Project Funding Summary				BUDGET PERIOD 9/1/2015 - to - 8/31/2016			BUDGET PERIOD 9/1/2016 - to - 8/31/2017			BUDGET PERIOD 9/1/2017 - to - 8/31/2018			BUDGET PERIOD 1/0/1900 - to - 1/0/1900			BUDGET PERIOD 1/0/1900 - to - 1/0/1900			Total Project Budget						
				Total Funding	EDUCAUSE		Other Funding		Total Funding	EDUCAUSE		Other Funding		Total Funding	EDUCAUSE		Other Funding		Total Funding	EDUCAUSE		Other Funding			
Project Funding Totals				\$ 75,000	100%	\$ 75,000	0%	\$ -	\$ 75,000	100%	\$ 75,000	0%	\$ -	\$ 75,000	100%	\$ 75,000	0%	\$ -	\$ -	\$ -	\$ -	\$ 225,001	100%	\$ 225,001	0%
Other Committed Funds:																									
1																									
2																									
3																									
4																									
5																									
6																									
7																									
8																									
9																									
10																									
Unfunded Project Costs				-				-	-				-	-				-	-			-			

Complete the table below for each direct cost category on the Budget Summary tab that meets the threshold amount. If there are not enough rows for the items budgeted, please contact your program officer for a customized template. Reminder: Information should only be entered into the yellow input cells and, when completed, no red cells should remain.

Direct Cost Detail	Period Starting 9/1/2015			Period Starting 9/1/2016			Period Starting 9/1/2017			Period Starting 1/0/1900			Period Starting 1/0/1900			TOTAL BUDGET		
	Total	EDUCAUSE		Total	EDUCAUSE		Total	EDUCAUSE		Total	EDUCAUSE		Total	EDUCAUSE		Total	EDUCAUSE	
	Budget	%	Amount	Budget	%	Amount	Budget	%	Amount	Budget	%	Amount	Budget	%	Amount	Budget	%	Amount
CONSULTING & PROFESSIONAL FEES - If \$50,000 or more annually, enter detail by line item.																		
Consulting & Professional Fee Totals (from Summary tab)	46,350	100%	46,350	38,182	100%	38,182	34,817	100%	34,817	-	0%	-	-	0%	-	119,349	100%	119,349
Consulting & Professional Fees - Detail Totals	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
MATERIALS & SUPPLIES - If \$25,000 or more annually, enter detail by line item.																		
Materials & Supplies Totals (from Summary tab)	-	0%	-	-	0%	-	-	0%	-	-	0%	-	-	0%	-	-	0%	-
TOTAL MATERIALS & SUPPLIES	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
COMPUTERS & EQUIPMENT - If \$25,000 or more annually, enter detail by line item.																		
Computers & Equipment Totals (from Summary tab)	-	0%	-	-	0%	-	-	0%	-	-	0%	-	-	0%	-	-	0%	-
TOTAL COMPUTERS & EQUIPMENT	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
PRINTING & PUBLICATIONS - If \$25,000 or more annually, enter detail by line item.																		
Printing & Publications Totals (from Summary tab)	-	0%	-	-	0%	-	-	0%	-	-	0%	-	-	0%	-	-	0%	-
TOTAL PRINTING & PUBLICATIONS	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
TRAVEL & ACCOMMODATIONS - If \$25,000 or more annually, enter detail by line item.																		
Travel & Accommodations Totals (from Summary tab)	9,272	100%	9,272	6,440	100%	6,440	-	0%	-	-	0%	-	-	0%	-	15,712	100%	15,712
TOTAL TRAVEL & ACCOMMODATIONS	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
CONFERENCES, CONVENTIONS, MEETINGS - If \$25,000 or more annually, enter detail by line item.																		
Conferences, Conventions, Meetings Totals (from Summary tab)	8,560	100%	8,560	8,560	100%	8,560	8,560	100%	8,560	-	0%	-	-	0%	-	25,680	100%	25,680
TOTAL CONFERENCES, CONVENTIONS, MEETINGS	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
DIRECT FACILITIES - Please review item D Direct Costs, Facilities on the Glossary tab for correct usage of this category. If \$10,000 or more annually, enter detail by line item.																		
Direct Facilities Totals (from Summary tab)	-	0%	-	-	0%	-	-	0%	-	-	0%	-	-	0%	-	-	0%	-
TOTAL FACILITIES	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
OTHER DIRECT EXPENSES - If \$10,000 or more annually, enter detail by line item.																		
Other Direct Expense Totals (from Summary tab)	4,000	100%	4,000	15,000	100%	15,000	24,805	100%	24,805	-	0%	-	-	0%	-	43,805	100%	43,805
Micro-Award #1	1,500	100%	1,500	2,500	100%	2,500	2,500	100%	2,500	-	0%	-	-	0%	-	6,500	100%	6,500
Micro-Award #2	1,500	100%	1,500	2,500	100%	2,500	2,500	100%	2,500	-	0%	-	-	0%	-	6,500	100%	6,500
Micro-Award #3				2,500	100%	2,500	2,500	100%	2,500	-	0%	-	-	0%	-	5,000	100%	5,000
Micro-Award #4				2,500	100%	2,500	2,500	100%	2,500	-	0%	-	-	0%	-	5,000	100%	5,000
Micro-Award #5				2,500	100%	2,500				-	0%	-	-	0%	-	2,500	100%	2,500
Micro-Award #6				2,500	100%	2,500				-	0%	-	-	0%	-	2,500	100%	2,500
Student Peer Advisors							14,805	100%	14,805	-	0%	-	-	0%	-	14,805	100%	14,805
TOTAL OTHER DIRECT EXPENSES	\$ 3,000	100%	\$ 3,000	\$ 15,000	100%	\$ 15,000	\$ 24,805	100%	\$ 24,805	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ 42,805	100%	\$ 42,805

BUDGET NARRATIVE

Explain specifically how your project's outcomes and milestones are supported by the proposed budget.

The proposed budget supports the University of South Florida (USF) IPAS project's outcomes and milestones by providing external consultants and professional development opportunities for the persons associated with the development of the Advanced Tracking Leading to Academic Success (ATLAS) system at USF. ATLAS is an academic tracking system that is designed to empower undergraduate students to develop customized academic plans leading to the degrees and careers of their choice. To date, the implementation of ATLAS has been slowed by a number of factors, including fiscal constraints, technical issues, and business practices that have been slow to adapt to new technology and processes. 74% of the funding in year 1 will cover the cost of consultants and their respective travel. As is required in the request for proposal, 11% of the funding request is earmarked for four USF team members to attend the EDUCAUSE Annual Conference in October 2015. 5% of the funds requested will support professional development activities for academic advisors. 10% of the requested funding for year 1 will fulfill the mandated indirect costs for U.S. universities.

In years 2 and 3, the University of South Florida will complement and support the technological innovation of a fully functional ATLAS system by providing professional development opportunities to academic advisors. The activities will enable advisors to refine their counseling, coaching, and risk management skills. In year 2, 51% will cover consultant expenses and 20% of the request will fund micro-awards for collegial and innovative thinking staff. In year 3, 46% of the funding request will cover consultant expenses, 13% of the request will cover similar micro-awards to year 2 and 20% of the request will cover peer student advisors. 11% of the funding request for years 2 and 3 is earmarked for four USF team members to attend the annual conferences, respectively. The balance of remaining funds will be earmarked for awards to support retention and progression initiatives in colleges, departments or units through micro-awards that are designed to spur innovative thinking and practices. 10% of the requested funding for years 2 and 3 will fulfill the mandated indirect costs for U.S. universities.

By 2018, USF will have a fully functional ATLAS, completed by the development or enhancement of the policies, practices, and programs that are used by advisors and students to develop and monitor progress toward degree completion on customized academic paths. The completion of the ATLAS system will contribute toward the achievement of several important performance targets, including a 70% six-year graduation rate, 50% four-year graduation rate, 90% retention rate (1st to 2nd year), and 70% four-year transfer student graduation rate.

To the extent that your organization will be relying on additional funding to make this grant successful, describe: a) the proposed sources of funding (e.g., a grant from another organization or earned revenue generated by the project); b) the status of the funding sources (e.g., proposal submitted or grant awarded); c) the assumptions used to generate any estimates; d) strategies and timeline for securing the necessary additional funding.

The completion of the ATLAS system is not solely dependent on the funds provided by an IPAS grant. Institutional investments will be required to complete the system. Complete functionality of the system will only be achieved by investing additional recurring resources in technology and personnel. In the event that the planning process produces a decision to add another academic planning program to the ATLAS tool box (such as Degree Map) for example, the funds for the acquisition of this Civitas application will come from institutional sources. Additional academic advisors, research analysts, and IT personnel will also be required to complete the implementation, and these recurring funds can only come from institutional sources. The value of the IPAS grant is in providing external expertise—through the employment of consultants and professional development opportunities—is that external funds will accelerate and add value to the internal efforts of the last few years.

YEAR 1 Narrative

Consultants and Professional Fees

USF will engage the services of consultants to analyze the shortcomings of the current Advanced Tracking Leading to Academic Success (ATLAS) system. The consultants will identify the most successful methodology to innovate and fully operationalize ATLAS - \$46,350

Travel and Accommodations

Two consultants will travel to USF bi-yearly [at the beginning of year 1 and at the mid year point] to analyze and implement innovative solutions for the full implementation of the ATLAS system. Average cost per traveler per trip is \$1,640 - \$500 airfare, lodging for 4 nights at \$200/night, incidentals of \$340 including meal allowance, baggage fees, and transportation/parking – \$6,560 Two consultant will travel to USF at the end of year 1 to review the status of ATLAS and provide next steps for years 2 and 3. Average cost per traveler per trip is \$1,355 - \$500 airfare, lodging for 3 nights at \$200/night, incidentals of \$255.5 including meal allowance, baggage fees, and transportation/parking – \$2,712

Conferences, Conventions, Meetings

Four team members' travel to the EDUCAUSE Annual Conference in October 2015. Average cost per traveler is \$2,140 - \$500 airfare, lodging for 3 nights at \$200/night, incidentals of \$255 including meal allowance, baggage fees, transportation/parking and the registration fee of \$785 – \$8,560

Other Direct Costs

Micro-awards (2 @ \$2,000) to be awarded to USF academic advisors, career counselors, faculty, enrollment planning analysts, and/or others who propose and implement an innovative idea or approach to academic planning or retention. The awardees would put those resources directly into implementation of their awarded idea/approach with a focus on designing scalable or sustainable practices and changes of practice – \$4,000

YEAR 2 Narrative

Consultants and Professional Fees

USF will engage a “needs assessment” consultant/professional to understand exactly what our academic advisors and students' needs are for an academic planning system. The consultant/professional fee includes travel expenses to USF – \$32,500

USF will engage the services of a professional development consultant for academic advisors, career counselors, enrollment planning analysts, and/or others that revolves around academic/educational planning - with a focus on assessment, continuous process improvement, outcomes/measurement, or similar concepts that speak to improvement and sustainability of processes and systems – \$5,682

Travel and Accommodations

Four academic advisors, career counselors, enrollment planning analysts, or others that revolves around academic/educational planning to visit other institutions and share/develop best practices. Average cost per traveler per trip is \$1,610 - \$470 airfare, lodging for 4 nights at \$200/night, incidentals of \$340 including meal allowance, baggage fees, and transportation/parking – \$6,440

Conferences, Conventions, Meetings

Four team members' travel to the EDUCAUSE Annual Conference in October 2015. Average cost per traveler is \$2,140 - \$500 airfare, lodging for 3 nights at \$200/night, incidentals of \$255 including meal allowance, baggage fees, transportation/parking and the registration fee of \$785 – \$8,560

Other Direct Costs

Retention innovation micro-awards (5 @ \$2,500/award plus 1 @ \$2,500/award to scale out one successful micro-award from year 1) – \$15,000

YEAR 3 Narrative

Consultants and Professional Fees

USF will re-engage the consultant from the “needs assessment” to look at how well the processes and systems have met the advisors' and students' needs and to make recommendations or assist with finding/filling gaps in need. The consultant/professional fee includes travel expenses to USF – \$26,600

USF will engage the services of a professional development consultant for academic advisors, career counselors, enrollment planning analysts, and/or others that revolves around academic/educational planning - with a focus on assessment, continuous process improvement, outcomes/measurement, or similar concepts that speak to improvement and sustainability of processes and systems – \$5,000

USF will engage the services of two trainers at \$1,609 who will train the peer advisor student employees – \$3,217

Conferences, Conventions, Meetings

Four team members' travel to the EDUCAUSE Annual Conference in October 2015. Average cost per traveler is \$2,140 - \$500 airfare, lodging for 3 nights at \$200/night, incidentals of \$255 including meal allowance, baggage fees, transportation/parking and the registration fee of \$785 – \$8,560

Other Direct Costs

Retention innovation micro-awards (4 @ \$2,500/award); follows the same model of year 1 and year 2. These may be new awards or may be for scaling out successful prior awards – \$10,000

Eighteen students will be hired to take on low-level advisor duties during orientation sessions. Their salaries total \$700/year (70 hours @ \$11.75/hr.) – \$14,805