Understanding and Supporting Equity-Centered Student Success Routines and Practices for Impact

Insights

December 2023
EPISTEME for Moore Philanthropy
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We conducted a study to investigate how student success efforts are constituted, managed and routinized by MLLs and their institutions. Instead of centering MLLs as “users” (their behaviors, mindsets, habits, barriers/challenges, etc.), we centered their organizational practices and (formal and informal) organizational systems.

Our aim was to identify the scaffolding and mechanisms that underlie successful collaboration and coordination around student success in order to develop ECSS-centered public goods.

Previous studies supported by BMGF have underscored the pivotal role of mid-level leaders (MLLs) in driving transformation efforts, but more insights on these critical ‘users’ were needed to begin designing solutions that address institutional challenges.

The current research seeks to identify strategies for enhancing and supporting MLLs in their pursuit of equity-centered student success through the utilization of public goods.
Dr. Tiffany Polite is the founder of FGM Consulting and served in a variety of programmatic, administrative, and leadership roles focused on improving experiences in and the quality of higher education for over 10 years. She earned her Ph.D. in Educational Studies with a specialization in higher education and student affairs from The Ohio State University, is a Certified Strategic Foresight Practitioner, an alumna of the National Inclusive Excellence Leadership Academy, and a Professional Certified Coach.

Her professional agenda centers around understanding the dynamics of power, organizational design, and institutional change processes in decision-making, practice, and policy, with particular emphasis on the role of institutions and organizations in the creation and perpetuation of inequitable social outcomes.

Dr. Funke Sangodeyi is the founder of EPISTEME Research and Strategy, LLC. She has led projects for C-suite clients across a range of industries and has 10+ years of experience in qualitative research, UX research, and strategy consulting. She holds a PhD in History of Science from Harvard University, an MPhil in History and Philosophy of Science from the University of Cambridge, and a Bachelor’s in Molecular Biology from Harvard.

EPISTEME clients include Meta, the Bill & Melinda Gates Foundation, Hims & Hers Health, and Jamaica National Group.

http://www.epistemestrategy.com
MLL Research Project Overview

Research Focus
Organizational and administrative practices for and challenges to advancing ECSS work

From Insights to Innovation Briefs for Challenges of Practice

1. Reviewed prior BMGF work and other research on student success, equity in higher ed, MLLs, and organizational behavior

2. Conducted 33 interviews with MLLs from 16 institutions and collected ECSS-related materials

3. Bottom-up analysis of interviews and materials to identify emerging themes, shared needs, solution strategies, and pain points across institutions

4. Developed 80-question survey for an expanded pool of MLLs to refine insights and identify insights-driven opportunities for investment

5. Prioritized opportunities by potential impact and feasibility based on participants’ feedback captured in a follow-up survey and BMGF input

6. Streamlined prioritized opportunities into 3 Opportunity Areas: 1) Initiative Operations, 2) Understanding Students, and 3) Faculty Buy-in

7. We discussed all three opportunity areas over the course of the Community of Users workshop at BMGF (November 1-3), but initiative operations provided our core design challenge. We tackled the 6 thorniest challenges of practice across the initiative life cycle as identified by study participants.
Participating Institutions

Amarillo College
Austin Community College
Boise State University
Cal State University, Stanislaus
Cal State University, San Marcos
College of Staten Island, CUNY

Elizabeth City State University
Fayetteville State University
Florida International University
Fort Valley State University
Grand Valley State University
Lehman College

Nevada State University
Norco Community College
Northern Arizona University
Portland State University
Sinclair Community College
Southern Connecticut State U.

University of Guam
U. of Southern Alabama
University of Texas Rio Grande Valley
Western Kentucky University
Winston-Salem State University
Participating Institutions

23 total and 16 in core research group: all regions represented except the Plains; undergraduate enrollment ranges from < 2,000 to 46,000+

EPISTEME
Participating Mid-Level Leaders
46 total; 33 in core research group

Who participated

- Functional Unit leaders (14)
- AVCs/AVPs of Student Success, Student Engagement, Student Affairs, etc. (13)
- Deans, faculty, and other academic leaders (8)
- VPs of Student Success, Student Affairs, Strategy, Undergraduate Studies, etc. (8)
- Data Leaders and analysts (VP for Institutional Effectiveness, Manager of Research, AVP of Admissions and Recruitment, etc.) (6)

45% of respondents for whom data analysis is a primary job responsibility
<table>
<thead>
<tr>
<th>Name</th>
<th>Role and Responsibilities</th>
<th>Institution</th>
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<tbody>
<tr>
<td>Chad Atkinson</td>
<td>Manager of Research and Chair of the IRB</td>
<td>Sinclair Community College</td>
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<tr>
<td>Melissa Bader</td>
<td>Professor of English &amp; Guided Pathways Faculty Lead</td>
<td>Norco College</td>
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<tr>
<td>Gary Brown</td>
<td>Vice Chancellor for Student Affairs &amp; University Advancement</td>
<td>Elizabeth City State University</td>
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<tr>
<td>Victor Brown</td>
<td>Associate Provost for Academic Programs and Educational Effectiveness</td>
<td>Lehman College</td>
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<tr>
<td>Susan Brown</td>
<td>Assistant Vice President, Office of Strategic Analysis and Institutional Reporting</td>
<td>UT Rio Grande Valley</td>
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<tr>
<td>Patricia Burke-Williams</td>
<td>Advising Manager for STEM Career Community &amp; Equity Summit Lead</td>
<td>Sinclair Community College</td>
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<tr>
<td>Becky Burton</td>
<td>AVPAA</td>
<td>Amarillo College</td>
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<tr>
<td>Lawrence Camacho</td>
<td>Dean Enrollment Management &amp; Student Success</td>
<td>University of Guam</td>
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<tr>
<td>Nicole Carr</td>
<td>Associate Vice President, Student Academic Success</td>
<td>University of South Alabama</td>
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<tr>
<td>Jonikka Charlton</td>
<td>Associate Provost of Student Success Dean of the University College</td>
<td>UT Rio Grande Valley</td>
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<tr>
<td>Roddrick Chatmon</td>
<td>SACSCOC Liaison/ Program Coordinator/Associate Professor</td>
<td>Fort Valley State University</td>
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<tr>
<td>Bridgette Cram</td>
<td>Vice President for Academic Affairs</td>
<td>Florida International University</td>
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<tr>
<td>Mary Cruz</td>
<td>Interim Associate Dean</td>
<td>University of Guam</td>
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<tr>
<td>Alisha Davis</td>
<td>Assistant Vice President of the Social Justice Centers and Director of the Office of Multicultural Affairs</td>
<td>Grand Valley State University</td>
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<tr>
<td>Laurie Dickson</td>
<td>Vice President for University Strategy and Senior Associate to the President</td>
<td>Northern Arizona University</td>
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<tr>
<td>Heather Dunn Carlton</td>
<td>Associate Vice President for Student Engagement &amp; Wellbeing/Dean of Students</td>
<td>Cal State Stanislaus</td>
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<tr>
<td>Tavoria Freeman</td>
<td>Director of the Bronco One Stop</td>
<td>Fayetteville State</td>
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<tr>
<td>Andrea Garrity</td>
<td>Executive Director of Student Success</td>
<td>Portland State</td>
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<tr>
<td>John Georgas</td>
<td>Senior Vice Provost for Academic Operations</td>
<td>Northern Arizona University</td>
</tr>
<tr>
<td>Cierra Griffin</td>
<td>Executive Director for Adult Learners, Transfer, and Military Students</td>
<td>Fayetteville State</td>
</tr>
<tr>
<td>Tuesdi Helbig</td>
<td>Director, Office of Institutional Research; Special Assistant to the President for Strategic Planning</td>
<td>Western Kentucky University</td>
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<tr>
<td>Sean Hunter</td>
<td>Director</td>
<td>Boise State University</td>
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<tr>
<td>Tenisha James</td>
<td>Interim Vice President Planning &amp; Development</td>
<td>Norco College</td>
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<tr>
<td>Molly Kerby</td>
<td>Assistant Provost for Institutional Effectiveness</td>
<td>Western Kentucky University</td>
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## Participating Mid-Level Leaders

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<thead>
<tr>
<th>Name</th>
<th>Title</th>
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<tbody>
<tr>
<td>Karla Knepper</td>
<td>Director of Academic Advising</td>
<td>Sinclair Community College</td>
<td>Yolanda Seabrooks</td>
<td>Morgan State</td>
</tr>
<tr>
<td>Laura Lucas</td>
<td>Director, Strategic Initiatives</td>
<td>Austin Community College</td>
<td>Susan Shadle</td>
<td>Boise State University</td>
</tr>
<tr>
<td>Willie Martinez</td>
<td>Associate Vice Chancellor, Student</td>
<td>Austin Community College</td>
<td>Kathy (Doria) Stitts</td>
<td>Winston-Salem State</td>
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<td></td>
<td>Engagement &amp; Academic Success</td>
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<tr>
<td>Ernesto Olmos</td>
<td>Senior Director of Advising and Completion</td>
<td>Amarillo College</td>
<td>sandip thanki</td>
<td>Nevada State College</td>
</tr>
<tr>
<td>Jennifer Ostergren</td>
<td>Dean of the College of Education, Health,</td>
<td>California State University San</td>
<td>Tracy Tyree</td>
<td>Connecticut State Colleges and University</td>
</tr>
<tr>
<td></td>
<td>and Human Services</td>
<td>Marcos</td>
<td></td>
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<tr>
<td>Marlena Pangelinan</td>
<td>Vice Provost, Institutional Effectiveness</td>
<td>University of Guam</td>
<td></td>
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</tr>
<tr>
<td>Ralf Peetz</td>
<td>Dean of Science and Technology</td>
<td>College of Staten Island, CUNY</td>
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<tr>
<td>Katie Pereyra</td>
<td>Senior Director of Student Success Operations and Strategy</td>
<td>Florida International University</td>
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<tr>
<td>Amy Pifer</td>
<td>Director of First-Year Experience</td>
<td>Amarillo College</td>
<td>Daniel Velez</td>
<td>Grand Valley State University</td>
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<tr>
<td>Dana Poole</td>
<td>Executive Director of Student Success &amp;</td>
<td>Elizabeth City State University</td>
<td>Erica Wagner</td>
<td>Portland State</td>
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<td>Conrad Walker</td>
<td>Lehman College</td>
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<tr>
<td>Catherine Preston</td>
<td>Senior Director, Academic Advising &amp; Transfer Services</td>
<td>University of South Alabama</td>
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<tr>
<td>Gregory Robinson</td>
<td>Vice Provost for Student Success</td>
<td>Nevada State College</td>
<td>Cori Watkins</td>
<td>Portland State</td>
</tr>
<tr>
<td>Ana Rummer</td>
<td>Associate Vice Chancellor Student Affairs Operations</td>
<td>Austin Community College</td>
<td>LaMonica Wilhelmi</td>
<td>Winston-Salem State</td>
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**Study Participants Overview**
Most of our insights map onto the PRPAM Continuous Improvement Model

**PREPARE**
Review, analyze and consider student success initiatives and goals

**REFLECT**
Gather information and people to reflect on goals, progress and plans

**PRIORITIZE**
Review data, discuss alternatives and prioritize in order to initiate/proceed with plans to address gaps

**ACT**
Make changes and investments in people, processes, and technology in order to address gaps

**MONITOR**
Monitor progress against goals and support the changes made
Insights Mapped onto PRPAM Model (at the Institution Level)

1. IMPACT OF THE PHILANTHROPIC CONTEXT

2. UNDERSTANDING STUDENTS
3. STUDENT BEHAVIOR, ENGAGEMENT & UX
4. ECSS DEFINITION & PLAN
5. DATA LITERACY & CAPACITY
6. FACULTY RESISTANCE
7. NARRATIVE
8/9. ROLE OF FORMAL SS STRUCTURE
10, 12. INITIATIVES
11. INITIATIVES
1. The **philanthropic approach** to funding drives fragmentation in ECSS efforts at institutions and can make building sustainable efforts more difficult.

2. Institutional stakeholders (especially faculty and the Board) struggle to move past antiquated and/or inaccurate notions about their student body and often **don’t understand what it means to be a student today**.

3. Institutions are using **student experience mapping**, **student behavioral data** and **student engagement data** to help rationalize holistic ECSS efforts and to **deepen their understanding of students**.

4. Many institutions don’t have a **consensus definition for what student success should mean**—much less what equitable student success should mean.

5. Institutions are increasingly **setting clear goals for their unique equity challenges** as part of their strategic planning, but **struggle to operationalize** them.

6. Most institutions we studied are **disaggregating data and have data analysis capacity**, but MLLs struggle to interpret and deploy it for ECSS.

**Faculty resistance** to actively engaging in ECSS efforts is a major challenge; even when faculty believe they are committed to ECSS goals, they resist change.
Insights Summary

7. **Narrative** has been identified as a powerful tool for communicating the impact of institutional ECSS efforts, yet this remains an underutilized mechanism for creating buy-in.

8. **SS units** formally live within an assistant or associate VP/VC portfolio and seem to lack intentional student-centered design— but share some core structural components.

9. **Centralized SS units** seem to produce the most streamlined, organized and effective ECSS efforts – and SS unit structure can impact ECSS challenges.

10. Institutions that deployed deliberately structured “project teams” in ECSS initiatives had a more robust and effective approach to ECSS work.

11. The biggest challenges to ECSS initiative work lie in 1) monitoring and evaluating impact …

12. … and 2) solution exploration & development.
External & Institutional Pressures
INSIGHT #1
The philanthropic approach to funding drives fragmentation in ECSS efforts at institutions and can make building sustainable efforts more difficult.
Leadership and MLLs are committed to increasing equitable outcomes at institutions, but face external challenges to sustaining ECSS efforts

External Imperatives

- Different philanthropic organizations’ priorities
- State & federal funding priorities
- Board priorities
- Civil, social, and political unrest

Implications

- External pressures create inefficiencies and fragmentation on the ground that the existing institutional infrastructure must absorb and respond to. Re-orienting around these changing priorities is challenging along process, resource and organizational lines.
- Often MLLs must focus on funding bodies’ priorities rather than the needs of their institution’s students.
- The need to navigate the politics of funding bodies can limit MLLs’ agency and effectiveness in addressing student needs.

“We’re trying to build and sustain a culture of student success so that there are more people engaged in the work; that way, if one leaves, the work can continue. However, the time-limited funding, usually via grants, is a killer. We haven’t found a way around that in any systematic way.”
### Philanthropic Interventions: Pros and Cons

<table>
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<tr>
<th>PROS</th>
<th>CONS</th>
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<tr>
<td>• Funding for resource-constrained institutions</td>
<td>• Time-limited</td>
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<tr>
<td>• Funding for under-resourced or neglected needs, challenges and populations</td>
<td>• Can shift emphasis away from most pressing needs, challenges and populations (because philanthropic institutions have their own priorities)</td>
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<td>• Ability to circumvent/avoid institutional and/or local politics</td>
<td>• Need to understand and navigate philanthropic institutions’ politics</td>
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<td>• Catalyzing innovation and new methods and approaches</td>
<td>• Newness for newnesses sake— incentives are towards trying new things, not refining or building on old methods</td>
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<td>• Advances and accelerates collaboration and cross-functional engagement</td>
<td>• Support ends and the work reverts back or the institution is left with the complexities of change prompted by the effort</td>
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<td>• Data-informed decision-making and assessment for ECSS efforts</td>
<td>• Lack of standardization of required metrics for reporting; Duplication of metrics and reporting in siloed, resource-constrained environments</td>
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Implications of these “cons” exacerbate existing challenges to sustaining ECSS in institutions

CONS

Time-limited | Can shift emphasis away from most pressing needs, challenges and populations (because philanthropic institutions have their own priorities) | Need to understand & navigate philanthropic institutions’ politics | Newness for newnesses sake– incentives are towards trying new things, not refining or building on old methods | Support ends and the work reverts back or the institution is left with the complexities of change prompted by the effort | Lack of standardization of required metrics for reporting; Duplication of metrics and reporting in siloed, resource-constrained environments

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Key Challenges to Sustaining ECSS Efforts

**Staff Turnover**
Efforts may die out or suffer when the person championing it leaves or takes on other formal responsibilities; already time limited grant-funded personnel exacerbates this

**Burnout**
Due to initiative overload, SS staff and “equity champions” who are usually involved in ECSS initiatives hit a wall/capacity and often absorb the work once funding runs out

**Boredom**
“We get bored easily with working solutions. We are great at creativity and rallying around a cause. But when we have made changes and starting "working a plan" we get tired and retreat to older habits.”

**Resource Constraints**
Continued state divestment; Time-limited (internal or external) funding; no strategic budget; no pathway for internal scaling

**Political Landscape**
External political realities - Board, locally, state or federally-driven - can limit, hinder, or end efforts
These challenges deepen the gap between institutional and student needs

Institutional Needs

- Align with the status quo and meeting the interests of those in control
- Primary concerns are resources, reputation, and competitiveness
- Place emphasis on real-time outcomes and positive results
- Typically in alignment with policies and practices that incentivize maintenance of the system and structure as it currently exists

Student Needs

- Focus on inclusivity and meeting the needs of unique populations
- Primary concerns are security, wellness, safety, and experience
- Place emphasis on immediate needs and future-oriented outcomes
- Precipitate institutional collaboration and equity-mindedness
- Elicit use of innovative strategies to diffuse knowledge and intervene on behalf of students

Though senior leadership is largely aligned with MLLs’ vision for ECSS and equity, they struggle to balance student needs and institutional imperatives – and the metrics they prioritize.
Traditional SS metrics prioritize institutional needs rather than the needs of students – and consequently miss critical factors that can drive better, more equitable outcomes

Many MLLs complain that their institutions lack a holistic enough approach to ECCS. Study participants were split (13 vs. 14) on whether their institutions had a holistic enough definition of SS. Those who didn’t believe their institution’s approach was holistic enough noted the following discrepancy between their institution’s narrow definition and what they believed it should include:

- Completion/graduation
- Retention
- Persistence
- Career preparation
- Reduction of financial stress
- Sense of belonging
- Personal growth
- Post-graduation success
- Social-emotional wellbeing
- Connectedness
- Engagement in student life
- Equity in the classroom and coursework
- Intersectional equity gaps

“Student Success" is defined by our system as graduation rates. We are currently trying to expand that definition, but ultimately the system definition is the one we need to follow. When we present on student success to the Board of Regents, we’re generally presenting on graduation rates and our student population. Beyond that, our definitions are more philosophical and difficult to measure.”
Senior leadership and SS leaders must demonstrate the institutional and business impact of ECSS and develop an effective institution-wide approach to operationalizing ECSS

Demonstrating Business Impact

Our respondents largely had confidence in their leadership’s support for equitable student success and commitment to equity, but worried about the support of the board and business/funding stakeholders.

Because funding is tied to core metrics and these drive operations, the case for ECSS must be framed in terms of its impact on an institution’s bottom line.

Developing an Effective Institution-Wide Approach

Our respondents felt leadership lacked the clarity, awareness, bandwidth, will, and/or resources to provide the level or type of support student success teams need.

Centering students’ needs, not the institution’s needs, to drive better outcomes for both

MLLs see institutional problems like dropping enrollments, matriculation challenges and stubborn equity gaps as related to a fundamental misunderstanding of student needs, but it is difficult for them to demonstrate impact of ECSS efforts and to identify the most effective interventions.

MLLs want to be able to demonstrate centering students in the right ways and approaching ECSS holistically can help boost their institutions’ bottom line.
Opportunity

1) How might BMGF help reform the philanthropic approach to funding higher ed initiatives to promote sustainability?
Centering Students
INSIGHT #2
Institutional stakeholders (especially faculty and the Board) struggle to move past antiquated and/or inaccurate notions about their student body and often don’t understand what it means to be a student today.
MLLs generally believe that key institutional stakeholders lack a deep enough understanding of students.

Study participants stressed that advancing equity requires a very clear understanding of who an institution’s students are and their needs. Study participants largely felt senior and academic leadership, other mid-level administrators and front line staff did know this— but the faculty and board lagged behind.

**Preparedness**

*Meeting students where they are*

“We need to be student ready. It would be helpful to shift the culture around student interventions and more on institutional interventions. Rather than preparing students, how do we design courses and resources that meet students where they are at? This is a gap I see often.”

**Profiles**

*Understanding who they are and where they come from*

“We need to fully understand the students we serve today and who we will be serving tomorrow. This goes beyond race/ethnicity, but fully understanding personas of our students so that we can work towards properly serving the students we have and helping address the very real life circumstances that are around.”

**Professions**

*Understanding where they are going (and the environments they will need to navigate)*

“It is time for us to fully understand more about what our students need to get the job or move on to the next level of education in a modern world. …Academia is lagging behind industry in understanding what success means in a business world. We are too disconnected and refuse to listen.”

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**“The College Student”:** 70% of respondents believed institutions still held an antiquated notion of who a prepared student is.

**Aspiration vs. Reality:** 80% of respondents saw a need to serve the students who are at the institution—not those the institution may strive to enroll.
Understanding Students: Some key barriers to ECSS that are often not front of mind for boards and faculty

**Key Barriers to Student Success** *(adapted from EAB)*

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<tr>
<th>Pre-college Academic Preparation</th>
<th>Family Expectations and Self-sufficiency</th>
<th>Climate</th>
<th>Financial</th>
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<tbody>
<tr>
<td>Limited access to college-prep academic support</td>
<td>Low familial awareness of college-going lifestyle</td>
<td>Low sense of belonging</td>
<td>Financial aid verification processes</td>
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<tr>
<td>Poor ESL reading and writing scores</td>
<td>Student self-efficacy</td>
<td>Engagement and responsiveness of faculty to students</td>
<td>Needing to work while enrolled in college</td>
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<tr>
<th>Pedagogy &amp; Academic Experience</th>
<th>College Navigation</th>
<th>Policies &amp; Procedures</th>
<th>Post-Graduate Outcomes</th>
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<tbody>
<tr>
<td>Academic recovery</td>
<td>Likelihood to register late for courses</td>
<td>Mismatch between credit accumulation &amp; financial aid rewards</td>
<td>Internship participation rates</td>
</tr>
<tr>
<td>Completion of online courses</td>
<td>Unproductive credit accumulation</td>
<td>Impact &amp; knowledge of transfer credit articulation policies</td>
<td>Impact of student debt</td>
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</tbody>
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INSIGHT #3
Institutions are using student experience mapping, student behavioral data and student engagement data to help rationalize holistic ECSS efforts and to deepen their understanding of students.
MLLs are experimenting with and institutionalizing ways to develop, deepen and share this student understanding

Key Challenges

- Antiquated notion of who a prepared student is—particularly in schools that source the local community for enrollment
- A gap between existing student population and students institution is striving to enroll
- Antiquated notions of what a successful student is
- Understanding the “real world” environment students will enter post-graduation

How Institutions Address These Challenges

- Individual and cohort assessments (e.g. CSI)
- ECSU is using the CSI to not only identify students, but to assess general profile of students
- Developing personas
- Focus groups
- Sharing population data & qualitative stories about student body to board and faculty in key meetings
- Community outreach/events
- Listening sessions

“I think often in higher education many stakeholders forget the student voice, so reminding them of who their students are and where their students are academically and personally will help all stakeholders serve students better. Storytelling is always a great option when trying to help the stakeholder see the bigger picture.”
Student Experience Mapping
12 (of 22) institutions used student experience mapping in various ways

**Mapping the journey to completion**

Austin CC, FIU, Grand Valley State, Lehman, Nevada State College, Portland State U, Sinclair CC, UTRGV, Winston-Salem

**Mapping the student experience**

Austin CC, Elizabeth City State, Grand Valley State, Nevada State College, Portland State U, UTRGV

**Cross-functional collaboration to develop interventions/solutions**

Austin CC, FIU, Grand Valley State, Nevada State College, Portland State U, UTRGV, Winston-Salem

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**Lehman: Blueprint for Success**
Institutions like Lehman College have developed their own student journeys to track student progress *Lehman College’s Blueprint to Success*.

**ACC: Wayfinding**
ACC is mapping how students navigate and engage with the institution at critical touchpoints (student experience).

**NSC: Exploration for Interventions**
Some institutions are using student experience mapping to help rationalize interventions as part of a collaborative problem-solving approach to student challenges.
MLLs want to find ways to include (more) student behavioral and engagement data to identify student pain points, challenges— and potential solutions

80% of study participants believed that student behavioral data is key for understanding equitable student success, but only 33% of participants were using it

84% of study participants believed that student engagement data is key for understanding equitable student success, but only 33% of participants were using it

Student Voice
Most institutions have mechanisms to capture student voice, including:

- Focus groups
- Surveys at key milestones (e.g. end of year), points of contact
- Student representative or government involvement in SS meetings and processes

Student Behavior
Some schools can track library use and number of times a student leaves the dorm if an issue is flagged by someone or triggered by the system (roommate, RA, professor, counselor, hold, etc.). Some MLLs are using this data to identify behaviors that nudge core SS metrics (grades, persistence and retention).

Student Engagement
Participation and involvement in student life and campus activities are also important measures that can point to a more holistic view of student well-being, but there is difficulty in collecting these data, as well as with making sense of their impact when integrated with academic measures.

“Some of the engagement data is very difficult to access from a variety of systems; the behavior data is more frequently accessed. Disaggregating to tease out group differences requires time and resources we don’t have, and because it’s not a stated priority of executive leadership, we are only able to do specific work when it is part of a project we take on to answer questions, or when it is grant supported.”
SS infrastructure scaffolds across the student journey, but often in piecemeal and makeshift ways

**Student Journey** *(adapted from Brightspot Strategy & EAB)*

- **Apply**
  - Searching, applying, deciding
- **Adjust**
  - Arriving and getting oriented
- **Approach**
  - Exploring programs & communities
- **Advance**
  - Progressing along a selected academic path
  - Making your mark on campus
  - Connecting with global and local communities
  - Preparing for life & career after graduation
- **Attain**
  - Graduating and transitioning
- **Affiliate**
  - Staying connected to the school as an alum

**Student Success Infrastructure**

- Enrollment Mgmt
- Bridge programs, Orientation
- Initial Advisory meetings, first year experience programs
- **Tracking**; Case managers, advisors, tutoring center, writing center, faculty notes, alerts, etc.
  - Red Flags that trigger interventions:
    - Drop, fail, and withdrawal
    - Residence life infractions
- **Advancement**
- **Enrollment**
- **Affiliation**

Initiatives not under purview of formal SS structures or personnel
Students have to navigate a landscape of often confusing services that are not structured around their needs

Lack of SS Infrastructure
Students are often passed off and bounced around between departments and offices and must proactively seek out guidance and support because it’s unclear how to navigate available resources

Loosely Structured SS
Students typically have to find a compassionate staff member they can depend on for guidance

Centralized SS Units
Students are able to engage one-stop service units for support
More sophisticated SS models are aligned with and address students needs in real-time and provide wraparound care

Sophisticated SS Models
A red flag triggers direct support and guidance from faculty and staff (coordinators, advisors, etc.). A care/cross-functional team is alerted via a student success tech platform, which allows for continuous and collaborative support for that student.
Opportunities

2) How might BMGF help institutions and their Boards better understand their students and “meet them where they are” along their journey?

- **Understanding Students**
  - Who are they (needs, histories, aspirations, goals)?
  - Experience mapping (navigating the institution)?
  - Journey mapping (navigating through their degree/credential)?

- **Focus on University Boards**
  - How to foster student-centered mindsets to redefine Board orientation to ECSS?
  - How to integrate Boards & their roles into institutional transformation efforts?

- ...?

3) How might BMGF help institutions capture, track and deploy student behavioral and engagement data?

- ...?
SS Infrastructure
Infrastructure helps with three core areas related to change and systemic support for student success: implementation, sustaining efforts and cultural change.

We used Dr. Adriana Kezar’s framework to investigate how institutions and identified some key pain points and opportunities. identified a few key insights regarding these elements of Dr. Kezar’s framework.
INSIGHT #4

Many institutions don’t have a consensus definition for what student success should mean– much less what equitable student success should mean. Institutions are increasingly setting clear goals for their unique equity challenges as part of their strategic planning, but struggle to operationalize them.
Insights: SS Infrastructure

Key Infrastructural Touchpoints: Decision-Making & Governance

Pain Point: Defining ECSS for the Institution

Not all institutions have a formal, much less clear or consensus definition of student success, but almost all our study participants agreed that having one was critical for ECSS.

Only 1/2 of institutions had a clearly articulated definition of what “student success” means according to the MLLs we interviewed, but 36 of 37 participants believe that having a clearly defined and well-articulated student success framework is critical.

“My experience has been that if a school has clearly defined what student success means to them and what their student success goals are, then it is more likely that there will be dedicated infrastructure and resources dedicated to the work. This also usually means the work will be successful because there's dedicated leadership and senior leaders have made it an institutional priority. Schools where there isn't an infrastructure for student success are usually the ones where an assumption is made that success will flow naturally from faculty just doing what they do in the classroom (and as advisors). Lack of clarity about what you're trying to impact usually means that there's not deep expertise in student success work.”
Key Infrastructural Touchpoints: Decision-Making & Governance

A clear ECSS definition is fundamental because it can help ...

Identify clear, measurable goals

“Defining student success is a first step in achieving it. When there is a clear definition, measurable goals can be developed along the necessary strategies and tactics to achieve those goals throughout the organization with the appropriate resources—human, financial, technological, facilities, etc.”

Identify the right metrics

“Definitions spawn metrics which drive efforts. If measures are selected without significant care, there can be unintended consequences when attempting to meet goals that are defined in terms of those metrics.”

Rationalize project planning & priorities

“The definition of student success determines the parameters for which we can plan and initiate projects.”

“If equity and success are not clearly defined, they won’t happen to specific groups. We need to be intentional and targeted.”

Guide allocation of resources

“The lack of a definition for student success, leaves lots of room for interpretation and ensures that needed resources may or not be placed appropriately.”

Clarify stakeholder roles & responsibilities

“A clear definition of student success would aid in the development of action steps that would provide all stakeholders with a clear vision of who would be responsible for achieving that goal.”

Elevate the institutional over the individual & streamline efforts

“Without a clear definition of student success, there is a tendency to view it through an individual lens rather than measured against the collective definition. It’s like having a bucket of Legos and no directions. We can all build something, but we won’t use all the pieces or agree on the construction method. We need a strong definition upon which we can build.”

“Without a definition, individuals are left to craft their own ideas. This could lead to fragmented effort.”
Institutions are increasingly setting clear goals for their equity challenges as part of their strategic plans, but struggle to operationalize them.

Setting institution-specific ECSS targets and metrics beyond core metrics

~1/2 of institutions included in the study have defined their own institution-specific metrics and goals that target their unique equity challenges as defined by leadership’s priorities, federal, state or industry funding, and data analysis of equity gaps/challenges.

A critical component of planning is to determine how to rationalize the status quo—to tie the existing reality, which is often chaotic and fractured, with a new vision—often driven by a leadership change.

Only 30% of MLLs surveyed said that their institutions have taken an inventory of ECSS programs and initiatives across the institution, despite what is typically a patchwork landscape for ECSS efforts.

**Planning**

- **NSC’s intentional strategic plan development process**
- **Norco’ Community College’s 15 KPIs**

**Institutions who have done/are doing this:** ACC, Grand Valley, Norco CC, NSC, NAU, PSU, UTRGV

- Norco’s “Equity Crosswalk” to review and assess all ECSS efforts across the institution to identify redundancies and impacts in one overview
- **FIU ComPASS** (Communication Protocol for Accountability and Strategic Support)
INSIGHT #5
Most institutions we studied are disaggregating data and have data analysis capacity, but MLLs struggle to interpret and deploy it for ECSS.
Key Infrastructural Touchpoints: Data & Institutional Research; IT
Pain Points: Data capacity, literacy and analysis

Access to and use of data for ECSS is increasingly standard at institutions, but MLLs struggle with using it. Access to and use of data dashboards among MLLs and/or their staff is routine at our institutions (~90% of respondents), and half of our institutions had data capacity structurally embedded in SS units. However, MLLs were concerned about student populations that seemed neglected in favor of traditional students (e.g. online students).

Disaggregation to understand differential outcomes and routine cross functional data-sharing is occurring for many institutions (60% of our sample).

However, routine assessment of individual efforts and cross-functional synthesis and interpretation isn’t happening for most (20% and 30% respectively).

70% of respondents said they use data regularly in ECSS, but people don’t know what to do with it.

Some institutions have developed data coaching and training initiatives for staff, but few have incentivized them.
Key Infrastructural Touchpoints: Data & Institutional Research; IT

Institutions are using data in 4 key ways with varying degrees of sophistication in ECSS work, but all are struggling with the bedrock issue of data literacy

Critical Need for Transformative Use: Data Fluency
How do I explore and analyze the data?

Understanding problems
Seeking root causes of and contributors to problems

Exploring options and developing hypotheses for solutions to problems

Assessing effectiveness of interventions that address problems

Baseline Need: Data Literacy
How do I read and interpret the data correctly?

90% of MLLs surveyed had access to a dedicated team they could go to for data support, but most lacked continuous access to robust analytical capacity for their needs (for exploration and analysis) if they didn't possess it themselves
Key Infrastructural Touchpoints: IT, Facilities

Pain Points: Tracking Students across the Institution and throughout their Journey

A lack of integrated platforms & old systems make monitoring, intervening and collaborating around student challenges more difficult

The technological platforms used by many institutions to track student progress, identify equity gaps and student success challenges, and to guide problem solving are clunky and not integrated.

The most sophisticated institutions use these systems to centralize information about students that advisors, faculty members and admins can access and have built-in mechanisms to reach at-risk students (either pre-emptively or after the fact). Schools are trying to move towards a more proactive model for early intervention before there is a catastrophe that knocks a student off course. Though most institutions had a SS platform with early alerts, utilization varied, especially amongst faculty.

Many institutions are undergoing a tech overhaul and trying to do it in a way that includes all stakeholders for the rebuild.

Facilities as a source and partner for student behavioral data

Some institutions (e.g. ECSU) partner with facilities to track student movement and behaviors as a way to identify changes in student behavior that may signal a need for support.

MLLs who didn’t have this capacity were eager for access to this kind of behavioral data for SS interventions and to better understand student experience.
Key Infrastructural Touchpoints: Finances & Resources; Decision-Making & Governance

Pain Points: Strained and/or Inconsistent Financial Resources

Patchwork financing and intra-institutional jockeying for financing in a resource-constrained environment is a consistent challenge.

Institutions are trying to make a greater case for increased budgeting by building budgeting models that show how ECSS efforts directly impact the institution’s bottom line—or at least try to show how impacts boost core metrics.

“One thing I have done is I've been able to do do a model with the budget director, which says for every 1% increase in overall retention, that equals a million dollars in revenue for the university. And that is a thing that faculty and deans have latched onto because they know that our financial state is not great. So folks can start to see “oh, 1% That's not that much. We can do that.” And then we regularly are showing them, “look we’ve increased this by 2%-- that's $2 million.” So that can help even though schools and colleges don’t necessarily see that $2 million dollar increase trickle down to them.”
Key Infrastructural Touchpoints: Human Resources & Development; Incentives & Rewards

Pain Point: Burnout

This is a persistent problem for ECSS efforts and ranked as the biggest issues. There are not enough people to do the work—and “programmitis” leads to initiative overload for those involved.

Some schools offer incentives and project management support to help ease the burden on ECSS staff, but the introduction of new initiatives and efforts and staff turnover often means that core staff and equity champions get saddled with more work because they are deeply committed to it.

“Burnout and having a limited number of people engaged are problems being addressed in part by the model of having faculty and staff volunteer for committees and workgroups, rather than being assigned. The idea is that those working on the program bring particular interest, passion, and/or skills to the project that will help with sustainability and success. There is also an awareness of the need to scale across our service area, and for plans to be developed early to do so in a sustainable way.”

Most student success leaders/personnel may take on additional equity-minded initiatives/work despite being over capacity because…

- when funding for an impactful program dries up and its staff is cut, the responsibility for maintaining that program shifts to remaining staff.
- there is no clear or safe way to say no to leadership/management.
- they are driven by a deep commitment to “doing the work.”
INSIGHT #6
Faculty resistance to actively engaging in ECSS efforts is a major challenge; even when faculty believe they are committed to ECSS goals, they resist change.
Key Infrastructural Touchpoints: Human Resources & Development; Incentives & Rewards

Pain Point: Buy-in

Though MLLs surveyed said the majority of faculty generally consider helping students succeed as part of their responsibility, there were several key challenges to getting buy-in:

- 60% said faculty blame equity gaps and poor (or dropping!) student success metrics on their students.
- 60% said faculty feel unfairly attacked or blamed for poor outcomes.
- 50% said faculty can be dismissive of SS expertise and assessment from “staff” rather than academic peers.

“Faculty leadership can be resistant to assuming responsibility for priorities that come from senior leadership. Faculty believe that they have bought in [to ECSS], but the student experience suggests otherwise. Faculty struggle to prioritize needed changes that might impact the viability of departments, programs, courses, or other aspects of their work. Faculty are more faculty-centric than student-centric.”

Which Faculty are most resistant?

Our MLLs mentioned older, tenured faculty as most resistant, while the newest, youngest faculty were most engaged. Some mentioned STEM fields as more resistant to engaging with ECSS efforts than other fields; and doctorate-granting institutions tend to have the most stubborn faculty.
Key Infrastructural Touchpoints: Human Resources & Development; Incentives & Rewards

Getting Faculty Buy-in for Equitable Student Success Efforts

**Most common strategies to boost buy-in**
- Sharing faculty and department-specific student success data with faculty (85%)
- Building relationships with deans and dept. chairs (78%)
- Offering stipends for participation in student success initiatives (75%)
- Attending key faculty meetings (66%)
- Framing student success programs/efforts as providing a service/support for faculty, not just for students (63%)
- Listening & centering faculty needs and interests (59%)
- Showing proof of concept to other faculty and departments by piloting student success programs with adjacent and equity-minded departments (59%)
INSIGHT #7
Narrative has been identified as a powerful tool for communicating the impact of institutional ECSS efforts, yet this remains an underutilized mechanism for creating buy-in.
MLLs socialize ECSS across the institution in key ways, but can struggle to convey impact or excitement when sharing updates and data share outs

“More and "shorter" narratives shared with all staff; regular student profiles shared, not just one time a year at commencement, but throughout the year would be helpful. How to equip the institution - again - resources! Each of us have a story to share but there is not a place to catalog those stories in any valid way.”

“If there was a better understanding among senior leaders of what we actually do—and the metrics associated with that—it would be easier to get them to endorse and amplify the narrative. However, they are operating at a high level with an almost exclusive connection to retention, graduation, economic mobility, research dollars, etc., so I don't really foresee getting them to take anything other than a 30,000 foot view to the impact of the work. Now, if we had someone whose responsibility it was to help amplify these narratives, that would be great, but we're a large institution and that would take a fair number of people.”
Leveraging Narrative for ECSS Efforts

Why Narrative Matters

- **Explanatory Power**: Qualitative data can provide valuable insights into the "why" behind metrics and equity gaps.
- **Stories Stick**: Narrative is more impactful, compelling and memorable to stakeholders and can humanize equity challenges in a way that quantitative data can’t.
- **Student Experience**: The story of institutions is the story of students and the impact of ECSS efforts are most meaningful through the lens of their experiences—yet their voices are too often minimized or missing.

**KEY CHALLENGES TO LEVERAGING NARRATIVE IN ECSS EFFORTS**

**Quantitative Bias**
- Institutions are increasingly numbers driven and qualitative data can be dismissed as anecdotal.

**Finding the Right Balance**
- SS MLLs struggle with combining individual stories with broader measures to avoid overemphasizing single cases.

**No systematic storytelling infrastructure with needed expertise & tools**
- Stories and qualitative data are often not integrated with quantitative data in compelling, systematic and intentional ways.
- No clear way for developing comprehensive and consistent ECSS narratives and disseminating them across the institution.

**Collecting Qualitative Data**
- **Representativeness**: Concerns about the representativeness of participants in qualitative data collection.
- **Participation**: Challenges in collecting qualitative data, such as low response rates for surveys and difficulties in conducting focus groups.
- **Resources & Bandwidth**: Resource limitations and bandwidth constraints affecting the ability to collect, analyze, and integrate qualitative data effectively.

**INSIGHTS: SS INFRASTRUCTURE**
How Institutions Are Deploying and Routinizing Narrative

How, when and where to deploy it

Audience Targeting

Building narratives around powerful external imperatives and goals that resonate with external stakeholders and community audiences (e.g. ECSU & social mobility; Fayetteville State & Adult, Military, and Transfer Students)

Rich Storytelling

Using multimedia, videos, etc to illustrate a key challenge or tell a story about a community or student groups; project successes or failures (e.g. Sinclair, NAU)

Institutionalizing Student Voice in ECSS Routines & Deliverables

Annual surveys, point of service surveys, focus groups, involving students in governance and decision making with student representatives; including qual as well as quant data in reports and presentations as a baseline (e.g. U of Guam)

Disseminating Stories

Highlighting student stories through media sources, social media, institutional websites, and other platforms.

Building Personas

Using personas as a way to peg equity challenges and interventions to student’s experience and journeys in a way that humanizes and personalizes these challenges (e.g. Lehman College)

“We’ve been very successful in creating the narrative of our student Maria. Maria is frequently mentioned in our discussions, as we strive to provide the necessary services to help her succeed. Our Advocacy and Resource Center was established to support our Maria’s and remove non-academic barriers.”
Opportunities

4) How might BMGF help institutions develop a clear, holistic definition of ECSS and a plan for operationalizing it?

5) How might BMGF help institutions deepen and broaden data capacity (literacy, analysis & exploration) for ECSS efforts?

- Facilitating data literacy, discovery and exploration (training, tools, sandboxes)?
- Helping the sector institutionalize data literacy and analytics as a core competency for staff and faculty to develop?
- ...?
Opportunities

6) How might BMGF help institutionalize faculty involvement and commitment to ECSS?

- Understanding faculty motivations and resistance?
  - Focus on faculty as individual professionals/needs/aspirations/barriers
  - Focus on departments/units/local institutional context
  - Focus on what professionalism means in academia writ large

- Training/tools/frameworks for curricular reform?
  - Faculty aren’t empowered or equipped to be higher education professionals (rather than disciplinary experts) and there is typically little pedagogical and curricular support available.

- …?

7) How might BMGF help institutions facilitate narrative development for ECSS?

- Collecting + synthesizing qualitative data?
- Multimedia/Rich Story-making?
- Integrating qual and quant?
- Amplifying and incorporating student voice?
- Personas and other tools?
- …?
SS Structures & Organization
INSIGHT #8
SS units formally live within an assistant or associate VP/VC portfolio and seem to lack intentional student-centered design– but share some core structural components.
SS structures seems to grow organically according to capacity and need, not intentionally designed to support students

General Organization

- Operationally (financial aid, registrar, advising, etc.)
- Support-based (tutoring, writing centers, one stop centers, etc.)
- Aligned with senior leader responsibilities (faculty, data analytics, advising, online learning)
- Miscellaneous functions (e.g. grants, coaching, library, etc.)

Faculty Not Included

Only 2 institutions listed faculty under the purview of SS

Data

Half of SS units had data support embedded: In some institutions, SS MLLs had these data skills themselves and tried to upskill their teams (e.g. ECSU); other institutions formalized this capacity as part of the SS unit (e.g. FIU, PSU)

Innovation

This seems to be an emerging capacity at some institutions (PSU, NSC and WSSU in our sample)
INSIGHT #9
Centralized SS units seem to produce the most streamlined, organized and effective ECSS efforts – and SS unit structure can impact ECSS challenges.
SS Structure: One Centralized Unit

“\textit{It ensures that there is a very narrow perspective on whose work truly impacts student success outcomes when \ldots, there are a number of other offices that actually contribute to student success that meet the needs of students besides admission, tutoring, other coursework supports.}”

**Key Strengths**
- Tighter coordination across efforts
- Clearer processes for evaluation and monitoring
- Clearer sets of metrics/goals to aim towards
- Clearly folded into standard operating procedures
- Potentially easier to identify and prioritize student challenges/needs and design interventions intentionally

**Key Challenges**
- A tightly organized structure may be too aligned with leadership’s priorities and may miss solutions or problem identification coming from outside of the SS infrastructure. It may limit what kinds of interventions are invested in, regardless of student impact because of political considerations and structural inequities
- A narrow perspective

*Some institutions have a hybrid structure for SS; see slide 61.*

---

**Institutions with this Structure**

Amarillo College, College of Staten Island, CUNY, Elizabeth City State, Fayetteville, FIU, Grand Valley State, Lehman, Nevada State College, PSU*, U Guam*, U Alabama, UT Rio Grande Valley
SS Structures: Loose Collection of Departments + Siloed Staff

A loose collection of departments with a general mandate

Key Strengths
- Opportunities for innovation/experimentation
- Culture of collaboration
- Less political tension

Key Challenges
- Avoiding duplication of effort
- Role allocation
- Accountability

Siloed staff embedded in individual departments and/or schools

Key Strengths
- Greater degree of independence
- More space for individual-driven efforts tailored to the needs, priorities of specific units/depts

Key Challenges
- Avoiding duplication of effort
- No institutionalized monitoring function
- Fragmentation of efforts
- Local view of SS that may not connect to broader institutional needs/challenges

Institutions with this Structure

*Some institutions have a hybrid structure for SS; see slide 61.

Institutions with this Structure
- Austin CC*, Cal State Stanislaus, Northern Arizona U*, U Guam*, Winston-Salem State*
- Austin CC*, Boise State U*, Norco CC, PSU*, Sinclair CC*
SS Structures: No Formal Structure + Hybrid Structures

**Institutions with this Structure**

**Key Strengths**
- Greater degree of independence
- Opportunities for innovation & experimentation
- More space for individual-driven efforts

**Key Challenges**
- Avoiding duplication of effort
- Lack of accountability
- No institutionalized monitoring function: “Once we implement, we don’t take time to analyze the results of the implementation.”
- Fragmentation of efforts

**Not Mutually Exclusive**
- Not mutually exclusive: depends; where you sit in the institution may determine the SS structure (e.g. different schools or colleges within a university)
- Some particularly SS-centered and mature institutions have a combination of all (e.g. PSU)

**Institutions with Hybrid Structures**
- Austin CC, Boise State, PSU, Northern Arizona U, Sinclair CC, U Guam, Winston-Salem State

*Hybrid structures

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**“There are multiple efforts across campus and no single office or person responsible for monitoring the impact of the data.”**

**“We have a ‘centralized’ SS office that focuses on strategy & project management, and SS staff in schools & departments across campus.”**

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INSIGHTS: SS STRUCTURES + ORGANIZATION
Comparing Implications of Structure Regarding ECSS Efforts

MLLs with centralized SS units rated their ECSS efforts as more mature & streamlined than their peers

<table>
<thead>
<tr>
<th></th>
<th>Initiating</th>
<th>Rationalizing &amp; Coordinating</th>
<th>Sustaining</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Centralized</strong></td>
<td>Inertia</td>
<td>Too much time and attention spent putting out fires vs. strategic problem solving</td>
<td>Time-limited funding; network of people to lead and to do the work</td>
</tr>
<tr>
<td><strong>No formal structure</strong></td>
<td>Limited network of people to lead and do the work</td>
<td>Loss of institutional knowledge from dead or abandoned initiatives</td>
<td>Time-limited funding, lack of sustainability plans, orphaned efforts &amp; burnout</td>
</tr>
<tr>
<td><strong>Loose collection</strong></td>
<td>Inertia</td>
<td>Difficulty getting visibility into what is happening across the institution; no formalized or centralized process for initiating programs</td>
<td>Burnout, network of people to lead and to the work, orphaned efforts, lack of sustainability plans</td>
</tr>
<tr>
<td><strong>Embedded/Siloed</strong></td>
<td>Limited network of people to lead and do the work</td>
<td>Bandwidth</td>
<td>Time-limited funding; burnout</td>
</tr>
</tbody>
</table>
Opportunities

8) How might BMGF help institutions support innovations in or intentional redesign of SS unit structures?

9) How might BMGF help institutions overcome ECSS challenges unique to their SS structure?
ECSS Initiatives
INSIGHT #10
Institutions that deployed deliberately structured “project teams” in ECSS initiatives had a more robust and effective approach to ECSS work.
Using a structured project team approach for initiatives seemed to facilitate ECSS efforts

Common Components of Project Team Approach
Project charters, sourcing across the institution for roles, incentives (financial or service), RACI charts to indicate clearly defined roles and responsibilities, time-limited frame (1-2 years), allocated project management & data analysis support, regular touchpoints with team members and with SS leadership/advisory team, goals and metrics plan, sustainability planning*

1/2 of our sample’s participants had this approach at their institutions; these tended to be community colleges and 4-year colleges vs. doctorate-granting institutions.

Institutions with a Project Team Approach*
Amarillo, ACC, College of Staten Island, ECSU, FIU, Fort Valley State, Grand Valley, Lehman, Nevada State, Norco, Northern Arizona U, PSU, Sinclair, Guam

Institutions without a Project Team Approach*

Example: Portland State University
PSU has institutionalized a project management approach to streamline efforts and make it easier to juggle the work to great effect and has built templates, forms and guides for initiative coordination and facilitation.

*Some institutions have a hybrid, inconsistent approach in different units; the overlap between categories reflects this.
Institutions with project teams had a more streamlined and deliberate approach to ECSS challenges overall

Institutions with project teams were more likely to have coordinated, inventoried ECSS efforts that reflected leadership’s institution-wide goals; and were much more likely to have clear ECSS-specific metrics and goals to target.

At these institutions, there was also a more holistic approach to ECSS in general– and MLLs felt more empowered to say no to leadership regarding initiative overload, approach and “programmitis.”

<table>
<thead>
<tr>
<th>Institution has ECSS-specific metrics &amp; goals?</th>
<th>Institution takes a holistic approach to ECSS?</th>
<th>ECSS initiatives have been inventoried?</th>
<th>ECSS efforts are coordinated?</th>
<th>Difficult to say no to leadership?</th>
<th>Local ECSS efforts reflect Institutional goals?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Teams</td>
<td></td>
<td></td>
<td></td>
<td>17%</td>
<td>70%</td>
</tr>
<tr>
<td>No project Teams</td>
<td></td>
<td></td>
<td></td>
<td>50%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Data, Tech & Tools: Project teams reflect a more data-driven and innovative culture around ECSS

Institutions without project teams presented a greater burden on ECSS leaders, and were less likely to disaggregate data or have access to real-time data for ECSS goals. Though many struggled with clunky and unintegrated technological platforms and systems, this was a bigger challenge for MLLs at institutions without project teams.

Institutions without project teams were also much less likely to use student journey mapping in their ECSS work.

<table>
<thead>
<tr>
<th></th>
<th>Clunky &amp; unintegrated tech platforms?</th>
<th>Limited network of people engaged in the work?</th>
<th>Student journey mapping?</th>
<th>Data disaggregation?</th>
<th>Access to real-time data for ECSS goals?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Teams</strong></td>
<td>2:1*</td>
<td>40%</td>
<td>50%</td>
<td>83%</td>
<td>80%</td>
</tr>
<tr>
<td><strong>No project Teams</strong></td>
<td>3:1*</td>
<td>70%</td>
<td>25%</td>
<td>33%</td>
<td>40%</td>
</tr>
</tbody>
</table>

“We get daily data files from student support departments helping us measure engagements. Student behavioral data are collected and managed/utilized by our CARE team.”

*Ratio of strongly agree/agree vs. disagree/strongly disagree on 5-point Likert scale
INSIGHTS #11 & 12
The biggest challenges to ECSS initiative work lie in 1) monitoring and evaluating impact and 2) solution exploration & development.
The Initiative Life Cycle

This cycle reflects how things work at the institutions of **75%** of study participants.

**90% with project teams; 50% without teams**

**What’s missing:**
- Piloting before full-scale implementation
- Iteration
- Scaling initiatives
- Sustainability planning

**Figure:**
- **Bar Chart:**
  - **w/ project teams:** All participants reported pilot testing.
  - **No project teams:** Only 40% reported pilot testing.
The Initiative Life Cycle: Biggest Pain Points

- Biggest pain points for Institutions with project teams: **Impact Monitoring and Evaluation**
- Biggest pain points for Institutions without project teams: **Solution Exploration and Development**
Impact Monitoring & Evaluation

Reflections from the field

54% of survey respondents have difficulty determining what metrics to use and how to measure them

Measuring Impact

“Aging on the proper metrics and structuring the intervention in a manner in which it can be accurately assessed is exceptionally difficult. Absent RCT design, it is very hard to determine how much a given initiative has affected student outcomes.”

“It feels as if, often, student success initiatives that are not clearly tied to academic success are hard to measure because of how qualitative they are.”

“Given the sheer number of efforts that we have, it can be challenging to isolate the impact of specific efforts.”

Boredom

“We get bored easily with working solutions. We are great at creativity and rallying around a cause. But when we have made changes and starting "working a plan" we get tired and retreat to older habits.”

Impact → ROI

“ROI in higher ed is one of the hardest things to measure. We are very good at showing impact, but translating that into ROI I think needs to be more of a focus to convince external stakeholders & funders and internal stakeholders (e.g. CFO etc...) why these initiatives work to save money and why we need to invest more.”

Data Integration

“We often struggle to show impact of various initiatives due to lack of consistent data collection practices, and to the use of disparate, disconnected systems that make it difficult to aggregate data. It often requires intensive manual processes to produce summary statistics on the effectiveness of various initiatives, and our ability to do so is limited by competing demands on staff time.”

Technology Integration

“We all need to use one system. Currently, we have office 365 products; however, there’s no direction on the single tool that everyone should use.”

Capacity & Time

“Collecting "new" data to assess initiatives and impacts, especially in a rigorous manner, requires more staff/capacity. We may even hire to implement, but we rarely invest in the evaluative component.”
# Impact Monitoring & Evaluation

## KEY CHALLENGES TO EVALUATING ECSS EFFORTS

<table>
<thead>
<tr>
<th>Measuring Impact</th>
<th>Technology Integration</th>
<th>Capacity &amp; Time</th>
<th>Data Integration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership increasingly wants evidence of how initiatives impact ROI, but it is difficult to calculate</td>
<td>Fragmented, often legacy and outdated systems</td>
<td>Overburdened staff; lack of capacity or budget for evaluation</td>
<td>Disparate data sources, types and repositories</td>
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</tbody>
</table>

## STRATEGIES TO ADDRESS THESE CHALLENGES

- **Identification of measurable outcome goals in advance of the project**
- **Using lead/lag indicators or KPIs/OKRs to monitor efforts in real-time**
- **Exploring data through statistical analyses to see which additional available information has an impact**
- **Engagement with external consultants for guidance on assessment**
- **Creation of an assessment team**

- **Investing in new integrated systems and involving multiple departments across the institution in the scoping/development of a customized enterprise system**

- **Using software to automatically generate specific assessments for stakeholders**
- **Building capacity by providing professional development around data literacy and analysis**

- **Implementation of an enterprise system to integrate disparate data systems**
- **Working to get a dashboard that will hold all data**
Solution Exploration & Development

Reflections from the field

Effective & Customized Data Use

“We know that our students are not persisting to earn degrees and that there are equity gaps in those experiences, but our approaches to address those problems have been either based on national best practices (that may or may not be relevant to our students) or simply based on anecdotal information. We need to to ensure that we are focusing on the right things.”

Navigating Politics & Egos

“We have too many chiefs and too many “know-it-alls.”

“There are preconceived notions of what the problems and solutions are by most faculty and staff. These notions often align with satisfying their own self-image and a savior mentality. Data does not change their opinion and they continue down fruitless and unnecessary paths.”

Limits on Solutioning Field

“We lack the ability to control many aspects of the institution that impact equity, such as the student experience within the classroom.”

Lack of Student Input

“Nobody wants to listen to the students. Student voices are very important in the work.”

Resources: Time & Money

“Because resources (especially finances) are tight, any solution is dependent on our ability to identify adequate funding and people to work on the initiative.”

70% of survey respondents said initiative overload and a limited network of people driving “the work” were the biggest impediments to solution development for ECSS initiatives.
### Solution Development: Practicalities

**KEY CHALLENGES TO INITIATING ECSS EFFORTS**

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<th>Initiative Overload/Burnout</th>
<th>Resource Constraints</th>
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<tr>
<td>Faculty and other institutional stakeholders are comfortable with the status quo and resist innovation that impacts how they do their work</td>
<td>SS staff and “equity champions” who are usually involved in ECSS initiatives have no capacity for new ones</td>
<td>Human, material (tools, space, software), technical (e.g. data analytics capacity, IT, subject matter expertise), financial</td>
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### STRATEGIES TO ADDRESS THESE CHALLENGES

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<td>● Forming committees with user input to get around those stuck in the past</td>
<td>● Shifting to a volunteer model for certain initiatives</td>
<td>● Incorporating financial data warehouse for data-informed budgeting</td>
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<td>● Bringing more people to the table early on to have conversations and share concerns</td>
<td>● Faculty burnout committees</td>
<td>● Recruitment of additional ECSS champions</td>
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<td>● Making regular reporting out part of our senate and strategic operations to normalize/institutionalize ECSS efforts</td>
<td>● Scaling down initiatives</td>
<td>● Formation of strike teams to address resource problems</td>
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<td>● Bringing in outsiders to help influence the culture</td>
<td>● Limiting new initiatives &amp; combining old ones</td>
<td>● Ensuring adequate compensation as an incentive</td>
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<td>● Cut less effective efforts and reassigned those involved</td>
<td>● Inviting new perspectives</td>
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<td>● Aligning external and internal initiatives around a core set of metrics and goals</td>
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Opportunities

10) How might BMGF help institutions develop project team approach/infrastructure?
   ● ...?

11) How might BMGF help institutions facilitate impact monitoring and evaluation for ECSS initiatives?
   ● Measuring impact & ROI?
   ● Technology integration?
   ● Data integration?
   ● ...?

12) How might BMGF help institutions facilitate solution exploration and development for ECSS initiatives?
   ● Resistance to change/limited solution space?
   ● Incorporating student voice?
   ● Expanding capacity (human, data analysis expertise, project management support, etc.)?
   ● ...?
Testing the I-I-I Framework
The I-I-I Framework

This framework was developed by BMGF as a tool for assessing institutional maturity in key transformation areas that drive continuous improvement in support of equitable student success.

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<td>How might we help institutions generate momentum and rationale for change?</td>
<td>How might we help institutions systematize discrete student success efforts into a campus-wide transformation agenda that connects mission, vision, and strategy?</td>
<td>How might we help institutions develop people and routines that best sustain equitable transformation?</td>
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| - Routines remain unit-based, and few are campus wide  
  - Institutional wide routines tend to focus on general operation. | - Start of new, cross-functional teams to look at shared data, metrics to transparently learn and plan for next steps  
  - Smaller routines connect to larger routines (cross-functional, institution level)  
  - Roles, functions, and platforms are formalized. | - Cross-functional teams gather to identify barriers to student success by examining data that show loss and momentum points. Teams gather at predictable and established times with a senior leaders for awareness and accountability  
  - Mid-level leaders meet more frequently with more detailed information to identify, track, and resolve barriers. There are structures and processes for ensuring accountability vertically and horizontally for resolving success issues by race and income. |
| - Remains largely unchanged but awareness for change has become more evident through diagnostic tools | - Small scale change begins with a clear focus on addressing specific student success problems (e.g., first to second-year retention, course sequence, advising)  
  - Shared and centralized institutional resources are evident. These resources allow leaders and teams to align around definitions and integrate campus routines. | - Formalized academic and staff structures: organizational, procedural, departmental, and functional personnel metrics/goals are refreshed and recast to orient approaches and time toward equitable student success. These structures are designed to scaffold and animate the business model of the institution. |
| - Campus has transformation champions who are embedded in units across campus but a whole institution change narrative remains early | - Leaders roll out a campus change narrative and speak to the role of individuals. Campus-wide equity work begins to take root.  
  - Changes in attitudes, beliefs, values are aligned with equitable transformation. Culture change is evident beyond the core change agents. | - Equitable student success is core to the cultural norms at the highest levels of leadership and the board and throughout academic and staff departments, typically manifesting in hiring practices, goal tracking and accountability, etc. Student experience problem-solving is a standard part of each department meeting and the cross-functional mechanisms that bring academic and operating functions together. These cultural norms are supported by engaging and involving students in defining problems and solutions. |
| - Remains unchanged but diagnostics tools are leveraged to identify the need for change | - New campus-wide strategy for transformation leads to different budget choices that prioritize equity  
  - Campus-wide budget process has operationalized equity principles to guide budget decisions | - Financial, time, physical, and human resources are allocated to student success practices, facilities, and managerial routines in addition to or as a replacement of more traditional college and university operating models and budgetary decisions. |
Mapping the Institutions against the Framework

**Least Mature***
Cal State Stanislaus, Cal State
San Marcos, CSI, Fayetteville
State, Fort Valley State, Grand
Valley State, Southern
Connecticut State, CSU, U of
Guam

**Most Mature***
Boise State, Elizabeth City
State, Norco, PSU, Sinclair, U
Southern Alabama,
Winston-Salem U

Austin CC, FIU, Nevada State
College, NAU, Amarillo,
UTRGV

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### How We Tested the Framework across our Institutional Sample

1. **FRAMEWORK DECONSTRUCTION**
   - We translated all of the indicators from each stage of the framework into individual statements for field testing

2. **FIELD TESTING**
   - Participants identified the indicators that reflected common experiences at their institution

3. **ANALYSIS**
   - Survey results were analyzed by mapping institutional responses (count data) to the I-I-I framework directly

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*Institutional maturity as determined by # of survey responses per framework stage by institution*
### Mapping the Institutions against the Framework: Heat Map

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<td>Routines remain unit-based, and few are campus-wide. Institution-wide routines tend to focus on general operation.</td>
<td>Start of new, cross-functional teams to look at shared data and metrics to transparently learn and plan for next steps.</td>
<td>1) Cross-functional teams gather regularly to identify barriers to student success by examining data that show loss and momentum points. 2) Teams gather at predictable and established times with senior leaders for awareness and accountability. 3) Mid-level leaders meet more frequently with more detailed information to identify, track, and resolve barriers. 4) There are structures and processes for ensuring accountability vertically and horizontally for resolving success issues by race, ethnicity, and income.</td>
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<td>Structure</td>
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<td>Small scale change begins with a clear focus on addressing specific student success problems. (e.g., 1st to 2nd year retention, course seq, advising).</td>
<td>Formalized academic and staff structures: organizational, procedural, departmental, and functional personnel metrics/goals are refreshed and recast to orient approaches and time toward equitable student success. These structures are designed to scaffold and animate the business model of the institution.</td>
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<td>1) Campus has transformation champions who are embedded in units across campus 2) but a whole institution change narrative remains early.</td>
<td>1) Leaders roll out a campus change narrative and speak to the role of individuals. 2) Campus-wide equity work begins to take root.</td>
<td>1) Equitable student success is core to the cultural norms at the highest levels of leadership (including the board of trustees) and 2) throughout academic and staff departments, typically manifesting in hiring practices, goal tracking, and accountability, etc. 3) Student experience problem-solving is a standard part of each department meeting and the cross-functional mechanisms that bring academic and operating functions together. 4) These cultural norms are supported by engaging and involving students in defining problems and solutions.</td>
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<td>Business Model</td>
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<td>New campus-wide strategy for transformation leads to different budget choices that prioritize equity.</td>
<td>Financial, time, physical, and human resources are allocated to student success practices, facilities, and managerial routines in addition to or to replace more traditional college and university operating models and budgetary decisions.</td>
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#### Fewest Responses

- Routines remain unit-based, and few are campus-wide.
- Start of new, cross-functional teams to look at shared data and metrics to transparently learn and plan for next steps.
- Smaller routines connect to larger routines (cross-functional, institution level).
- Routines, roles, and platforms are formalized.
- Changes in attitudes, beliefs, and values are aligned with equitable transformation.
- Culture change is evident beyond the core change agents.
- Equitable student success is core to the cultural norms at the highest levels of leadership (including the board of trustees) and throughout academic and staff departments, typically manifesting in hiring practices, goal tracking, and accountability, etc.
- Student experience problem-solving is a standard part of each department meeting and the cross-functional mechanisms that bring academic and operating functions together.
- These cultural norms are supported by engaging and involving students in defining problems and solutions.

#### Most Responses

- Routines remain largely unchanged but awareness for change has become more evident through diagnostic tools and reflection.
- Small scale change begins with a clear focus on addressing specific student success problems.
- Leaders roll out a campus change narrative and speak to the role of individuals.
- Campus-wide equity work begins to take root.
- New campus-wide strategy for transformation leads to different budget choices that prioritize equity.
- Campus-wide budget process has operationalized equity principles to guide budget decisions.
- Equitable student success is core to the cultural norms at the highest levels of leadership (including the board of trustees) and throughout academic and staff departments, typically manifesting in hiring practices, goal tracking, and accountability, etc.
- Student experience problem-solving is a standard part of each department meeting and the cross-functional mechanisms that bring academic and operating functions together.
- These cultural norms are supported by engaging and involving students in defining problems and solutions.
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**Mapping the Institutions against the Framework**

*Individual participant responses*
Common Challenges across Institutions

- Business model is the least understood/integrated
- Formalization of x-functional & institution-level SS processes, platforms and roles
- Structures and processes to ensure accountability vertically and horizontally for resolving SS challenges by race, ethnicity, and/or income– or other priority groups
- The [lack of] influence that equity objectives have on hiring practices, goal tracking and accountability, etc. throughout academic and staff departments.
- Equity-minded student experience problem-solving as a standard part of department meetings and x-functional mechanisms that bring academic and operating functions together.

Reflections from the Field

**Routines**

**Challenge of Sustainability**
“MLLs work on cross-divisional efforts, but roles and infrastructure for the work are not yet institutionalized. If current MLLs left, the whole thing would have to start over from scratch.”

**Response as Routine**
“If executive leadership choose to prioritize - they would join the Student Success Team for a meeting and state the charge.”

**Business Model**
 “[Equity] is part of our strategic plan, but no real change has occurred. Just a great deal of talk.”

**Structure**

**Inconsistent Scaling**
“We are large and some things are more established than others, so for certain things we are better structured and further along and for others we still haven’t scaled.”

**Roles and Responsibilities**
“This is complicated and not strategically coordinated at the executive level. The awareness is present, but the next step to structural changes is not. Specific units have grant funded work or small boutique programs to increase equitable outcomes. These efforts are done at the MLL level, not at the executive level.”

**Culture**

**Scaling Equity**
“There are many people (beyond the equity champions) who bought into the work, but it hasn’t reached all the corners of the university yet.”

**Equity Champions**
“We are very weak at this at the institutional level. There are "pockets of greatness" but it’s largely the result of particular efforts of specific people across various units. It is coordinated a bit by the Student Success Team - however the team’s priorities don’t necessarily reflect strategic efforts of executive leadership.”