Triaging for Student Success: Utilizing a Case Management Model

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Caroline Twachtman, Assistant Director, Undergraduate Studies – Academic Foundations
Agenda

• Foundation Building for Student Success
• Institutional Goals and Reflection
• Health Management Approach
• Evolution of Case Management Model
• Successes and Challenges
• Moving Forward
About USF Tampa

- Public Metropolitan Research I University (1956)
- 42,000+ enrollment (74% UG / 26% GR)
- Emerging Preeminent Research University (FL)
- Top 25 Public Research University (NSF)
- Approximately 4,400 new FTIC each year
Dedicated Effort to Improving Student Success

• New vision for supporting first year students (2006)
• University-wide Retention Task Force (2009)
• Creation of an Office of Student Success (2010)
• Appointment of the VP of Student Success to coordinate all efforts (2010)
• Gardner Foundations of Excellence self-study (2011-2012)
• Merger of the divisions of Student Affairs and Student Success (2016)
Florida Board of Governors Accountability on Student Success

Performance Based Funding:
2 of 10 metrics focused on retention & graduation

Preeminence:
2 of 12 metrics focused on retention & graduation
Retention Rate Improvement

**FTIC/Freshmen Retention Rate**

<table>
<thead>
<tr>
<th>Percent</th>
<th>2010 Cohort</th>
<th>2011 Cohort</th>
<th>2012 Cohort</th>
<th>2013 Cohort</th>
<th>2014 Cohort</th>
<th>2015 Cohort</th>
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<tbody>
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<td>91</td>
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*Source IPEDS: Data reported follows IPEDS methodology but are based on internal preliminary data.*
Graduation Rate Improvement

FTIC 6-Year Graduation Rates

<table>
<thead>
<tr>
<th>Year</th>
<th>Graduation Rate</th>
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<td>2004 Cohort</td>
<td>51</td>
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<td>2005 Cohort</td>
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<td>2006 Cohort</td>
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<td>2007 Cohort</td>
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<td>2008 Cohort</td>
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<td>2009 Cohort</td>
<td>68</td>
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<tr>
<td>2010 Cohort</td>
<td>67.5</td>
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<tr>
<td>2011 Cohort</td>
<td>70*</td>
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*Source: IPEDS. Data reported follows IPEDS methodology but are based on internal preliminary data and projection.
The top performer, University of South Florida, receives very high marks for improving its graduation rate and good—but not great—scores across the other dimensions. That’s good work, but they won’t be satisfied with the results yet.”

Eduventures, 2016
INSTITUTIONAL SELF-REFLECTION
Efforts Mostly Independent

- No way to share findings that would be of interest to everyone (one effort did not inform another)
- No way to track efforts by offices
- No conduit to inform everyone of changing requirements of various agencies for retention calculations
- Risked too many contacts with students
  - “Financial Aid office just called me yesterday—why are you calling me again?”
Extensive Individual Office Initiatives

• Office of Academic Advocacy
  • Created in response to USF’s Student Success Initiatives
  • Located in Undergraduate Studies
  • Enhancing student academic success by supporting advisors, developing systems, and improving academic policy and processes with the goal of increasing student persistence, progression, graduation and the overall student experience.
    • Objective #2 – Maintain or improve on 90% first year retention rate
  • Recent reorganization and expansion with specific advocates for persistence, progression, and graduation
Individual Office Initiatives

• Academic Advocates - Identify and counsel students who are at risk of academic probation and dismissal as the first year progresses—outreach
• Orientation – Orientation Leader outreach to first year cohort (Exit Survey, High-Risk)
• New Student Connections - Identify and counsel students who exhibit signs of failing to socially integrate into the University—contact by student mentors
• Academic Foundations – Monitor student participation for concerning trends; provide additional support for at-risk students; identify factors that may be impacting students’ adjustment to college and performance in academic environment
Defining a Differential Care Strategy

What Would Population Health Management Look Like in Higher Education?

- **Low Risk**
  - Time and Cost Savings

- **Moderate Risk**
  - Proactive Intervention

- **High Risk**
  - Preventative Measures
  - High-Touch Care

**Differentiated Care Strategies**

- **Coordinate Efficient High-Touch Care**
  - Work closely with students and manage their interactions with support offices

- **Proactively Monitor and Intervene**
  - Create an analytics “safety net” to catch common problems before they escalate

- **Enable Effective Self-Direction**
  - Provide easy access to information to leverage students themselves

Source: EAB Interviews and Analysis
Persistence Model (Practice)

Risk Identification & Segmentation
Which students are at risk?

High Risk Students

Increasing Risk Students

Low Risk Students

Individualized Support Strategies
How do we use our resources strategically and efficiently to support the individual needs of these students?

Coordinate High-Touch Care
Work closely with students and manage interactions with support offices/services.

Monitor and Intervene
Use analytics to uncover problems before they escalate.

Enable Self-Direction
Use electronic tools to nudge and advise, freeing staff to focus on higher risk students.

Efficient Scalable Care

Ownership & Accountability
Who owns student success?

Student Success Leadership
- Oversee efforts
- Organize resources & incentives
- Track & report metrics

Advisors
- Responsible for assigned student population success
- Accountable to student outcomes
- Use technology for proactive management

Slide Credit: Dosal, Fernandes, & Thompson, 2017
Identifying High-Risk Students

- Predictive Analytics
  - USF Research Model for First Year Retention (FYR)
  - Civitas – new tool to advance predictive analytics
  - Beginning College Survey of Student Engagement (BCSSE) responses
- Academic Probation
- Referrals from on-campus partners
- Self-referral
USF Persistence Committee

• USF Persistence Committee was convened as a standing group
• Included representatives from
  • Academic Advocacy
  • Financial Aid
  • Housing and Residential Education
  • Dean of Students
  • New Student Connections
  • Career Services
  • Academic Advising
  • Office of Decision Support/Institutional Research
  • Cashier’s Office
  • Student Well-being
  • University Ombuds
Collaborative Partnerships
Meet Ryan

https://youtu.be/KfcX8E6WD0U
What do we do?

1. Receive a Referral
2. Assign Advocate
3. Create Case
4. Make Referral
5. Monitor
6. Close Case/Referral
Current Challenges

• No way to identify needs to provide intervention prior to matriculation
• Tracking done through spreadsheets
• Coordination of communication
• Need for a centralized system
### Student Success Dashboard

#### Main Dashboard
- My Cases & Referrals
- Case Management Metrics
- Reports

#### Actions
- Search Students
- Create a Referral
- Create a Case

#### All Tasks

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Deadline</th>
<th>Created On</th>
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<td>12/22/2016 6:29 PM EST</td>
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<td>Respond to Referral for Riana</td>
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<td>1/10/2017 4:28 PM EST</td>
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#### My Corral

Enter search terms below to filter your corral

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<th>First Name</th>
<th>Last Name</th>
<th>Cohort Code</th>
<th>UID</th>
<th>Civitas Risk Indicator - TBD</th>
<th>Has Open Case?</th>
<th>Student</th>
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<td>University of South Florida</td>
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Moving Forward
Questions?

Thank you for your time & attention!

Contact email: academicadvocacy@usf.edu