# Transcript: Northeast Wisconsin Technical College (NWTC) Webinar – Promising Onboarding/Intake Practices

John: Good afternoon everyone. Nice to see you. My name's John Grant. I'm the dean of student development at Northeast Wisconsin Technical College. The areas that I represent are mental health counseling, career services, academic advising, disability services, early alert, title nine and student conduct and risk work.

Kelly: And My name is Kelly Casperson. I am the early alert manager NWTC. So under my kind of duties would be starfish as mostly the biggest part of my role, which also includes the intake survey in different retention initiatives like our faculty mentoring, a lot of data tracking with coaching and advising, so faculty engagement as well. But, anything else in those and we have some questions that we're going to hit on a lot of that. So...

John: Yeah, I'll just... I'll mention that. Kelly and I were fortunate to be part of both I-Pass one and two grants with the Gates Foundation and some of the work that we're going to be talking about this afternoon really was born out of the I-Pass work that we were doing trying to make early alert earlier, basically both through starting some work in predictive as well as... Is really sort of collecting information earlier from students that we weren't getting in any other way that we thought might be helpful for us to know in terms of creating success plans for them.

Kelly: So I think what we wanted to start with it says, and you know that we want to talk a little bit about addressing some technical questions as well as intake in our onboarding process. So I'll start with this kind of an overview of how are set up and what we use and how we do some of those different processes. So just like a college, I think, and here it says "Peoplesoft and Starfish." Those are the two systems that we use as well. We also have Blackboard. Those are, and then as a CRM, we use Salesforce. So those aren't really our four big technology systems at the college. In terms of onboarding, I'll just kind of walk through how we're set up.

So we have a recent change with our colleges that we have admissions advisors, the times that they apply to the college until they come to what we call a sore where registration session, which is a mandatory step in our new student process. It's very similar to an orientation. I know I heard that someone was one of our orientation directors here, so probably very similar to what you do. It's a required step for our new students. Once they're admitted to the college, they come to that session to learn more about our services. What about the college? Get a student ID and actually register for classes at that time. That's also when they take our intake survey. So it is a mandatory step that they come to that session and take that survey. So that's why we do have a really high response rate as far as a number of our new students that take that survey. From that point.

We also have a secondary component to our orientation, which is called a welcome week and that happens the week before the semester starts, so students come back for that right before the semester begins to learn a little bit more about nowhere to park, get a tour for where their classes are. Kind of adjust in time information. It's also when we present a keynote presentation on growth mindset, which does tie into some of the intake survey utilizing the resources on campus and that happens at that welcome week session within, like I said, the week before classes begin.

At that point, those are really the two required steps for our new students. We do have something called faculty mentoring that also happens in the first semester for our students. And that's a subset of new students depending on the program. It really depends. Some academic programs do every new student, some of the bigger programs just don't have the capacity to mentor every student, so they choose a subset of their new students. And the goal of that initiative is really for faculty to start engaging with our students early. So being able to review those intake survey responses with the students, talk with them about their program, make sure they have a right fit, make sure that they kind of know what their plans are going forward. And it is not an advising role. It is truly a mentorship role with that faculty member because we do also have assigned academic advisors, which I know you guys called counsellors in California, but our advisors are assigned as well. So the student would have an assigned advisor as well as this faculty member. It's just that the faculty does that advising our registration component. That's really an advisory role. I mean as far in general overview of how it's laid out, kind of that timeline.

John: Like Kelly said, maybe the biggest thing to take from that as we really split the onboarding into two pieces. And the upfront new student registration is really just those things that they know or need to know to get into classes and finance their education. And that's where we implement the intake survey and then welcome week happens the week before school, and that's really about meeting their instructors, really going over some program expectations and getting familiar with the space and sometimes even getting engaged in activity is already happening on that first welcome week day.

Speaker 3: I do have a question. When you do the survey and thank you for sharing your intake form, you called it a survey. Is it something that students complete in paper format or do you distribute it electronically somehow? How do you deliver the intake to the students?

Kelly: Yeah, we can definitely get into some of the technical stuff now I purposely didn't say that yet, but we totally can. So we've done it a couple of different ways. It's currently in Starfish, so we currently use Starfish to implement the survey and then do the reach after that, which I can talk through that process as well.

The prior to having survey available in Starfish is a newer functionality for the system, and before they had that ready, we actually used Survey Monkey, so it was just a regular Survey Monkey that we embedded into blackboard kind of course that students would log into and take that within Blackboard. I will say that the Starfish using it in Starfish is an extra step for the students because they have to log in and kind of click in a couple of places to get to it. Whereas in Blackboard it was just there and it didn't feel like an extra login because they were already using Blackboard during that session. So that, I would say, is the one downside of having it in Starfish is just that it takes an extra click or two for students to get to it.

That's not a downside by any means for the amount of time it saved us and the efficiency and just bring everybody being able to see the results of the survey. Putting it in Starfish is leaps and bounds about having it as a separate survey,

Speaker 3: So when you store event have we have something similar, we call it discover Palomar. So you bring your students in provide like pre-admission kind of work so admission work. Do you have them in a lab? Like, do you have everybody in the room, and you explain that now we're going to do this intake survey?

Kelly: Yes.

Speaker 3: Okay, so they're physically on campus when you admitted them to have a survey. If somebody doesn't attend are you able to push it out to them or have some follow up process for them to complete the survey?

Kelly: They are not supposed to be enrolling in classes if they don't attend. So at this point, we probably have really formalized session and working on an online section of it. So in the online section of it, we will, for them to start to log in and how to take it is supposed to be part of that online session. Right now though we are filtering through, and this is a relatively new set up for us, as far as having this required in person. But we will have it as part of the online once we get that all set up as well.

Speaker 3: And when you have them in the lab, and you have them do the survey generally how long does it take them to complete the steps? So it's about five minutes, 15 minutes...

Kelly: 2 Minutes

Speaker 3: Okay. They can talk technical later. I just wanted to picture at what point you engage your student and tell them what to do.

Kelly: Yeah. So the way I have it is kind of... The way that day work is that they are joined in one big room and we do a presentation about resources, we go through a financial plan, kind of what financial aid is and then each advisor, academic advisor takes their group of students to the computer lab or just a room that has laptops, either one. And in that room is where they do the intake survey right before they start enrolling in classes because our students enroll right on the computer obviously, but they're doing intake survey and enrollment with their advisor in smaller groups. So the advisor is able to introduce the survey a little bit, tell them about why they are to answering the question, what we do with the information. And it literally takes them, maybe a few minutes. It's a really short step.

Speaker 4: Quick question, when does this week happen again?

Speaker 3: The week before school opens.

Kelly: No, that's the welcome week. This one happens as soon as registration opens. So for right now for our January students that I started in January, we started in October. For fall students we actually started this process in April.

Speaker 4: Okay.

Speaker 3: Okay. So we have equivalent of them, so we're trying to... When you call them to what we call them so we can try and figure out if we can repurpose some of our time. Okay, wonderful. Thank you.

John: Well, I just gonna say part of reason why we do it during the new team registration processes to give staff the opportunity to connect with students prior to school starting. And if you're anything like us, we continue to admit students all the way up until sort of that first week of class if you will, which of course makes this process a little bit harder.

So, Kelly, we'll probably talk about that a little bit. And the reason we do that is we want to continue to have opportunities to connect with students if for some reason we couldn't reach them over the late spring and summer, maybe they're just not thinking about college yet, but in any case, then they get to class, and we have an opportunity in the first few weeks to reach out to them. Or if they were admitted late, and then we close those referrals and we let the real-time Starfish system of early alert and what's going on in their classes currently sort of take over priority.

Speaker 4: Quick question, one more. SOAR, it takes place in April, are they able to enroll I mean before the start of April for fall classes.

John: Yes. In summer.

Speaker 4: Now is June. Okay.

Speaker 2: And it'll go all, it goes weekly. All the way through the summer. So SOAR, it just keeps happening. Once April hits, it'll just eat every week. We'll have new sessions. So I can get into some of the workflow as far as what happens when a student takes the survey. Some of the more technical stuff if you'd like and alluded to some of it and you've asked them questions about it already. So it takes the survey at their store session and then I usually, I'm the one who then looks at those results, and we'll send out Starfish referrals to service teams here on campus in batches, well typically it kind of depends on the SOAR schedule, but if we have, so a bunch of SOAR sessions in one week, I'll wait until after those.

So it might be every week, it might be every two or three weeks. But I will go in timeframes, have chunks of time, and look at the students who took the survey in those two or three weeks; I will then filter the results, which Starfish, this is one of the huge benefits of moving the survey into Starfish is that it's literally just a one-click filter. And then I have my list of here's the 35 students who said they were unsure about their career or program choice. I select all, and I send a referral out to career services that says, here's the 35 students that indicated that they're not sure about their career, please reach out to them within the next 24 to 48 hours. And then we keep that process going. Teams each handle their referrals a little bit differently. So some teams will send, like first I might send like a mass text to that group of 35, or they might send a mass email to that group. Some may call them individually first, some may do the call individually second. So it really depends on the team staffing and kind of how they want to work those referrals. But they're responsible to reach out at least two times to try to get in touch with them prior to this semester starting or, yeah, at least within the first couple of weeks of the semester. Have that conversation about here's what you said on your intake survey. Know, first I want to let you know I'm a resource for you. Welcome them to campus. They can thank them for enrolling and then really get into some of those responses that they mentioned on the intake survey.

Now, students currently are not informed that they have this referral out there until a staff member makes a connection with them. So I know normally in Starfish if you're using it currently students get notified if they have a flag or referral. His referrals aren't behind the scenes, right? Only staff are notified that they're out there. We did that because we didn't want students, well, one students probably aren't checking their email before the semester starts. They might be confused about what it is, why they're getting this email from Starfish one an email to really be the first we wanted staff table to kind of control what they were saying to students and to make it more of a welcoming coaching type of conversation with those students rather than just a blanket email that says, "Okay, hey, you told us some things that might be barriers for your success."

Let's talk about those. so we, we've switched it so that students aren't notified and staff kind of controls those notifications to there, I'll repeat that process every couple of weeks until this semester begins. So I'll keep batching those referrals, sending them out to the different teams and teams, just keep on calling and reaching out to those students all the way, like John said to about week four of the semester. And then we just kind of clear them in bulk and say, okay, these students never responded. He never got back to us. Does that make sense? Questions about that process?

Speaker 4: One question. Did you say students are required to complete SOAR? What do you do with students who are completely online, say active duty people? How do you handle that?

Kelly: John might need to answer that. I know the process has changed.

Speaker 1: Yeah. So just for this particular semester start we've developed a new online orientation for our students. So we had a couple of advisors actually build that sort of an adaptive release type of with structure within Blackboard with the content and students essentially having to engage in it and demonstrate that they have completed the sections and then that triggers our admission staff to take a hold off of their registration once they complete the SOAR.

Speaker 4: Thank you.

Speaker 3: Can you also talk about what happens when a student doesn't answer. I know you said that week four is the amount of time you give the teams to respond but what process have you set and is it different for students in different areas.

Kelly: Yeah, each service team is able to really design what happens. Essentially there is no repercussions if a student doesn't get back to us. It's their choice if they want to respond to those referrals are not. What we do is typically, it's mostly right now for data purposes, so we track the students who responded are they, how much more likely are they to be successful in their classes and persist? That's kind of one of the kind of factors we use in our data pretty frequently is all the students who responded, and they do better than the students who never responded. Other than that, teams may do something, but it's not, it's not something that's documented. Then I wouldn't know kind of what each team is doing for that group.

Speaker 3: And can I also has how early you introduce Starfish to the new students?

Kelly: It will be at that SOAR so when they come to register for classes they'll here just tiny snippet about what Starfish's. Basically just to say that you can take your intake survey in it and that their services and you have like a success network. That's what they learn at SOAR. It's a very, very basic and then I welcome week. We get into it a little bit more but still not a ton. We don't have a great Starfish training for students yet. We're hoping to get there and it's really one of our goals for this upcoming year is to get students more engaged in the system. We've had Starfish for now five and a half years and students is really kind of our, our one area that we need to work on is getting the students trained in using it more frequently.

Speaker 3: So we're using Starfish for faculty members to give referrals. We're testing the feature where students can self refer right now, raise their hand. But when you bring your students into SOAR, what is the relationship you set up, not an instructor-student relationship? Is it some kind of umbrella relationship that you can, what format do you push the survey out to them? How do you get them all eligible to take the survey?

Kelly: It's either an on/off for the survey. So you either make it viewable or not viewable and then anyone who is in Starfish can see it. It will be like under the student's profile where they can change the email address. There's a little tab that says 'intake' so you can make it available. So you don't need any type of relationships. Now to see the results, that's where the relationships come in. You have role-based security based on who can see the results of the survey. Now I will say that our campus is very different when it comes to starfish security. We let every faculty member that's full time, every staff member that works with students, which is pretty much everybody, see every student. Instructors can see not just their own class. They can see all of the tens of thousands of students that are in Starfish. We made that choice very early on based on feedback from our faculty and from our students, that they wanted to just be able to see a more holistic view of the students and be more engaged in the student's entire career rather than just what they're doing in their class. So we do keep a very open security set up in Starfish.

Speaker 3: We'll have to talk about that later.

Speaker 4: And you already resolved any FERPA issues, right?

Kelly: Correct. All of our staff are trained on FERPA.

John: Yeah. We actually couple up the FERPA training with the Starfish training. It might be helpful to know too that just to back this process up a bit, when Kelly and I first started working on this, we brought a team together from across the college to include folks from, from our learning departments, from IT, from the library, from recruitment, from a number of different services and started sort of working through the process of what we wanted to know about students. And there were a number of tools that were available in the marketplace, but they were long, and they were expensive. And one of the things that really drove the work that we wanted to do is that we didn't want it to feel like a barrier in their registration process.

And so we decided to create our own in house survey based on what we sort of knew to be issues for students just based on our experience. And as you can imagine, lots of people wanted a piece of that. They they, they all wanted their questions, and you still do probably a pool of 40 to 50 and were able to get it down to about 15. In that process, we really backtracked it from the services that we already had available. So for example, we have a mental health counselling team, and we would pose the question to the mental health counselling team. If you could know something about a student prior to them ever enrolling here that might help you support them from a counselling perspective, what would that be and what would you do with it? And then those teams helped us design the questions that were referred to their service. And then those teams were also empowered to be part of the design of the intervention.

So we're going to give you this list of students who say that they have a mental or emotional health need that they might want support with. What do you want to do with that? And it was a really good opportunity and exercise I think to work through with each of the teams to really think about how we might handle this more proactively than when a student's in week seven, and they've failed two classes and all of a sudden it's crisis time, or there's something going on in their personal life. They were able to come in and build relationships potentially with some of our counsellors early or a disability staff or our advisors based on responses they had given that allowed us to have a plan in place and then a relationship built for when things got tougher.

Svetlana: If you could say a little bit more about building the survey over time because I know we're in at least iteration three, if not more. I love the fact that the people who will actually use data help to contribute to the questions. And so if you could just talk about how you involve people and the crafting of questions because some of it is quite sensitive and I was really impressed how you managed to get out difficult issues that say face in a way that seems really noninvasive and respectful and so forth.

John: Yeah. So I guess I'll start in Kelly, feel free to jump in. But one of the things that was really important to us is that we framed the survey in a way that I guess sort of nudge students to complete the survey in the first place. And so we give them a little bit of information about successful student behaviors and reaching out really acknowledging I guess an area of need and then hopefully reaching out and following up for support. And then you'll notice that the week close the survey with a question that's, that's really, there's another, there's another open-ended question in here which has to do with their primary language. But it's really the final question that we, we see a lot more of open text responses in.

And that was really the intent was to have them finish on sort of a very growth mindset, positive motivational type sense of their experience coming to college rather than to focus too heavily on where they might've identified barriers for themselves through this process. And so I, I don't know that that's perfect, but that was sort of the intent was to have them leave this experience feeling a little bit more positive. The questions themselves have really been, it's been a work in progress, and I will say from the first time we offered it, some questions have changed significantly. Some look very similar where I'm probably the third or fourth edition of this. And, and honestly, I will tell you where some of the issues came in is we, we realized that with all best intentions, we asked some questions that were double-barreled that we're probably confusing to a student. We asked some questions where the question didn't exactly line up as well as it probably could have with the responses. And so those are just a couple of examples.

But wording of course was, was really important. So one of the things that we did early on, we shared this with a number of people around the college to get feedback. And then we also took the survey into our dev or Dev Ed classes, and we had a few instructors and advisors share this with students and just get feedback about what's it like to take the survey, does it make sense to you? Do you understand what we might be asking here? And just getting some early feedback that helped to support the way the questions were being asked. And then we got some help from both Hobsons and from an organization called the Rucks Group that does evaluation work. And we spent the better part of an eight hour day pouring over every word of every question in here with, with help from them in terms of making sure that we are asking the best questions for evaluation, making sure we provided enough granularity in the responses, enough gradients, I guess.

And that was a really helpful experience. And then we continue to modify things a little bit. So, for example, this, this current semester right now that we're caring for and we're registering students integrating, we've added two questions. One around housing insecurity and one around food insecurity as those were, those were gaps for us that we identified fairly quickly as we, as we were learning more about our students and the amount of poverty that existed. So that's a little bit about how we got here. I will say one of the things that's probably overlooked in this process is you design these questions with the teams, they give you feedback about how they want to respond, and you build the responses and then you get the response back from the students, take the survey and all of a sudden you have data and you have to make some decisions about things like, okay, if a student said their past experience in math was slightly challenging, are we going to respond to that or is it only if it's moderately challenging and very challenging.

And so part of it was really, in the beginning, looking at the amount of response we had to particular answers and then sort of going through each of those and assigning referrals based on capacity and the teams they going to. So if that makes sense. We didn't want to send 600 referrals if we could avoid it to financial aid with a team of four people or five advisors. So that was also part of just this experience is trying to figure out like where's the threshold that's manageable, that's still having an impact. And I think we've got better at and asking some of these questions, but the other thing I'll say is that one of the things that Kelly and I have done a lot when we present on this topic as we do this exercise where schools will tell us a little bit of the information that they'd love to know about their students and when we have them actually write a question for themselves and their instincts and as part of it, one of the activities. And it's a great opportunity for us to hear really creative ideas. And, and good suggestions for things that we can consider to build into our survey as well. So we tell everybody you can borrow or our survey, you can, you can use what works for you and toss the rest. And that's part of the idea I guess is that hopefully, we all get better at doing this together and then hopefully we can still collect ideas from other institutions too.

Kelly: I would say a couple things to add is really the question that was probably the most difficult for us and still probably poses the most struggle and how we respond to it is the financial question. I think right now we have it settled too. How do you plan to pay for college and just give them various choices that has been worded different? I feel like almost, it just, it's just a challenging question for us because first and foremost, students don't have to pay until the semester starts and sometimes they're taking this six months in advance. So that makes it hard in one way. And also, there's just so many responses to it, and not all of them need someone to reach out to them landed on for this semester.

And I actually just use these referrals today. So right now with that question, the only two responses that get a referral right away are I'm unsure how I'm going to pay for college. That is our biggest one. If the student says unsure, it goes to our financial grant-funded financial coach. The second group that we look at, our students who say they're planning to pay with financial aid, and then I match that up. This is the only question that I pull out of Starfish and do in Excel. I match it up with who we have a financial aid, FAFSA on file for. I pulled that out of Peoplesoft, I match those two up and only raise referrals for students who said financial aid, but we don't have a FAFSA.

So that's the only group that I do a little bit of manipulation to those results. and we used to do that a lot more when we had the survey on Survey Monkey, and we would combine a lot of things and had a whole hierarchy of the data to get any referrals out. And no, literally, I just did it in a minute before we had a phone call today. So it's gotten a lot easier, and that's the one group that I would say still challenging, and they still get hundreds of referrals, and there's four of them. So it's still a difficult group for us to wrap our arms around. I'll also say that I think what makes this process an important part of it is having someone that can hold all the teams accountable. So right now that's kind of my role is to weekly send out updates about, okay, here's how many referrals are open financial aid, you have zero closed. Like, let's, let's get some organization help. Do you need advisors to help you in career services to help because maybe they don't have as many referrals? So kind of having of that accountability that teams can come back to. We didn't do that for before. I will say that it didn't, I didn't do as many weekly updates and we saw our response rate to the referrals dropped dramatically because we didn't have someone kind of pushing it along and making it a priority for everybody. we kind of felt like it was woven into what they did in their everyday work, but maybe not. So we're going back this semester to now having this weekly update about there's so many are open, here's how many are closed, here's, here's kind of a weekly update about what's happening that seems to work better. So we're going to go back to that now for this spring and see if it increases our response.

John: Yeah. I think once, once you asked some of these questions, I believe you take on a responsibility too to respond with some of this information that you become aware of. And so Kelly's right, I mean keeping the momentum up, especially at a time that for student services tends to be the busiest of the year. It can be challenging, but I think we try to sell it on the fact that these are opportunities to avoid larger issues later if we can be more proactive. And the other thing I'll just say about the questions and then we, we can stop talking for a bit, but if you look at, I'm not sure which version of the survey you have, but one of the things that we had to make an adjustment for was when we move the survey from Survey Monkey into Starfish, we lost the ability to put, to really make referrals confidential in a sense.

And I don't know if I'm going to do a great job explaining this, but in survey monkey we could, we could manipulate the data, create groups of students and send referrals about private type of things like mental health and disability that other services wouldn't see. When you move the survey into Starfish, it provides you the ability to upload all the information is uploaded into a student folder immediately, which is amazing. And people have access to it, and they can filter it, but you can't. It's either on or off. You can't hide questions or put security on questions. So we had to change what we ask about mental health. We had to change, or we ask about disability, and now we ask those as if you'd like more information on those.

Which to me it's a bit of a loss because when we asked the mental health question is as an example, and I tell us, everybody we talked to, we had 20% of our students saying they had a mental health or emotional, behavioral health issue they wanted support with in college and then we have another 5% who said they didn't want to respond to that question. So we knew that students A, we're being really transparent and honest because that seems to jive with sort of the norm, I think, across college campuses, but we also knew, and we likely had one in four, one in five students struggling with mental health. And I liked the fact that we had a more direct question that could help us support those students prior to getting here. So what questions do you have about all of that?

Speaker 3: Is that specifically because your campus is chosen to make to Starfish very open?

Kelly: It's just the way that the intake survey set up on or off. So you can't say I want it on, but I don't want anyone to see that you can't pick and choose security based on questions. It's either the whole survey or none of the survey. And with counselling and mental health questions specifically, we didn't want anyone to see it except for the counselors, and in the survey, the way it's built-in Starfish right now doesn't allow for that. I will tell you that I think every time I talk, and John and I talked to folks at Hobsons, we mentioned this. so, so I think they are sick of us asking for it, and maybe they'll do it, or that is my hope.

Speaker 3: Great. I do have a question about the referrals and the sort of the responses that you've gotten. Why in addition to the referral mechanism, is there anything that you have changed about the way that you offer those services to students that has changed as a result of what you learned from the referrals?

Kelly: Oh, that's a good question.

John: I don't know necessarily that it's changed, but it may be is reinforced a level of demand for certain services. I think it also is going to help eliminate some things for us, so for example, the housing and food insecurity questions, we really don't know anything about that. Unless a student comes forward and is seeking emergency funding or something like that. From our financial wellness area, we really don't know a whole lot about that other than which students are qualifying for Pell for example. So it has the potential, I think, to tell us a lot more about not only the services we have but maybe the services that we need.

It's a really good question. When we first designed the survey, one of the ways we were able to get down from 50 questions to about 15 is that we really worked with either services we had in place or questions that we thought would be valuable to a coaching or mentoring type conversation when you're meeting with a student one on one. With I think the full intent that over time we would continue to grow the question database just a little bit both from a predictive standpoint as well as being able to start partnering up some of these variables, seeing where there might be some significant overlap for students when they're entering the institution, but it'll be really interesting I think to see where there might be opportunities for us to be asking about other things that right now we don't provide support for and I think the housing and food insecurity questions, we do provide some work for those things right now, but I don't think we have a good sense for how much need is there and so that will be helpful.

Kelly: The other thing I'll note, I don't think we mentioned yet was we were very careful not to ask any questions that we get them to somewhere else. So if it's a question that we can get the answer to offer their application or in Peoplesoft somewhere or they may be answered on their FAFSA somewhere, we're not asking that again. We don't want students to feel like this is a duplication by any means. We also, anytime someone asks us to add a question, which happens a couple of times every semester I would say, because people know it's a really easy way to get to all students, right? So they're like, can I get my question in there?

We usually always bring it to our first team that built the survey and really talk through like, what would you do with this information? You want to ask this question, what do you want to do with it? Doesn't apply to all students or is it for your maybe niche grant or your small intervention that you're doing with 20 students? That's not really the type of questions we want to have on the intake survey. So there's been times very hard to tell people 'No', and we've helped them and it's really my role to help them figure out where else can we get this information, how else can we get at this? Or maybe we can work it in a different way that maybe we can help you get some of what you're looking for.

So it has been, you have to get your question vetted kind of thing because we don't want it to get to be a giant survey that takes students a long time to complete or that we're not doing something with the answer. If you don't want the questions on there that we're not going to do anything with.

Speaker 4: Kelly, can you give me an example of what type of intervention you might implement around a student who says they're working 40 plus hours per week while enrolled in classes?

Kelly: Yes, that's a good question. Not all of our questions have direct interventions, so I say that we want to use it for something. But that question specifically and it really depends what we used to do with that question is combine it with how many credits they were taking. So if they said 40 hours a week and they were taking 15 or more credits, we'd refer them to advising and advisor would call them and just talk through my management and make sure tackle their schedule. We no longer do that now that it's in Starfish, so that question is basically just for information so that when a staff member goes in to call the student may be about a different question, they're reviewing that behind the scenes and saying, ooh, now it looks like John is enrolled in 12 credits and he's working 40 hours a week. I should make sure I talk about that when I call them. Both really used more hours now as a case by case basis. Not as a general referral, but you could, like I said, we used to do it that way. It just took a lot more sorting, and it took a lot longer for me to get the referrals out when I was combining data pieces like that. Same thing with the subjects that we have the four questions on there about math, science, reading and writing. When we had the survey on Survey Monkey, another piece of data combination we did was, we looked at if they said that the subject was either the bottom two, so very challenging or moderately, I don't remember what they were, but they said this topic was challenging and the one enrolled in that subject, then we did a referral to academic coaching or tutoring. Now again, that took a lot more data manipulation behind the scenes, so we longer do that. Now coaching just waits until it gets closer to the semester. It gets closer to the beginning and sends out more of a general, "Hey, do you know we have a math lab and here are the hours." And it's more of a marketing piece than it is a referral for those questions. But again, in there for more of a case by case, I'm working with the student in a mentoring or coaching relationship, and they said that math is challenging., let's talk about this.

John: Yes. I think one of the things we're hoping is that staff will review the responses before a faculty mentoring meeting or an advising session. So that if a faculty member sees a student is struggling, it might be really helpful for them to know that English isn't their first language, they don't have access to the internet, or maybe they're caring for people in their home beside themselves. Those are opportunities I think to have a conversation that might not get approached without some of that prompting. And I think from the same perspective, we would look at it that way in student services, just gives you a little bit better sense of what a student's world looks like when they're coming to you at your institution and just how much support they may need and what they're trying to balance while going to school.

Speaker 3: I have a question, did you do the actual survey after ongoing experience meaning when they come on to the campus, a place in their life where maybe they are really certain they want to be whatever career they choose or they're feeling very confident about the program that they enter the classes, they start getting a little bit challenged, and they feel, “I don't know if this is right for me or I'm not sure I made the right choice”. Do they have an opportunity to go back and revisit or is that one, the interaction with what happens and that gets addressed?

Kelly: Yes or No. Technically the functionality is open so the students can go back in and change their answer as not something that I can turn off in Starfish so they can go in and edit their survey at any time. Now the problem with that and why I say no is that I don't know that they do that. So I don't then go in and send out a referral. So, I only do the referrals based on when the new students are coming in and registering and those chunks. Like I said, so if the student comes in in September and changes their answer about math, they're not going to get a referral because I don't know that they change their answer about math and they're no longer in that new student group that I would catch them. So that is another challenge with the surveys.

It is editable. We don't have a great way to catch that right now. Ideally or what happened in that situation is real starfish would take over, and the student instead of putting it on their intake survey would get a referral to coaching in our regular Starfish system, not based on the intake survey. So ideally that's what would be happening. But I can't promise you that students aren't going in there and changing their answers.

Speaker 3: There's not a timestamp or something.

Kelly: There is a timestamp; there's a last updated date. It's just gets really messy. As you can imagine. It's really focused on the new students. So currently our business practice doesn't really support catching students. Although it could if, we changed it.

Speaker 3: You mentioned earlier Kelly, that you do pull out information about FAFSA stuff from Peoplesoft and that you pull out the responses. So you're able to send out the data from the intake and look into an excel, and do the timestamps to come with it?

Kelly: It does, yes. There's a created on date, and there's the last updated date. So it'll give you the first date that they took it and then if they updated it. So if there's a difference in those days, you'd know that they updated it. But as you can, I mean every semester we have 2,500 students come through for the fall, take the survey. So it's just a lot of survey Rose to look through and sort through.

Speaker 3: Have you, in order to get intake form have you explode using the same intake form, but maybe rather than just leaving it open, like doing the full other take one but later, like later in there.

Kelly: Yes, we would love to; it doesn't allow for that. Starfish has one intake form. You can only have one active at any time, and if you change your question, the history goes with it. So it's a little bit touchy currently. Like I said, it's a newer functionality for them. So I have a feeling these things are coming. It's just pretty new in its usage in Starfish. So right now, one survey, one set of questions, that's all we get. But yes, ideally we'd like to ask another one maybe in semester two or semester three maybe with some different types of questions because we know that students have different issues as they continue on. But right now it just isn't set up for that.

Speaker 4: John this might be a little off track, but can you or Kelly explain a little bit about the mentoring process? Is it mandatory for all faculty? How do you match people up? How do you sustain that system? I mean, this sounds like it could be thousands and thousands of students.

John: Yes. So it is required a faculty by their leadership. And so basically what they do is, and Kelly I think referred to a little bit to this in the beginning, but it depends on the program team, and they'll identify first semester students and the number that they're going to reach out to. And then they'll assign those to different faculty members who then go into the Starfish system and create a faculty mentoring “to do.” And that gets sent to the student, and it allows us then also to measure the amount of contact basically that faculty are having with students as they clear those to do items once they've had the meeting.

The expectation really is just four at this time; full time faculty not necessarily are part-time. And I would say that, oh I want to say they probably had contact with somewhere between maybe 60 and 70% of their students just off the top of my head. Last semester we basically in measure how many there are based on the number of, to do's that get raised. And of course, there are students who just choose not to engage in that practice. But we really have been, I think trying to encourage faculty to meet with students even earlier than when we first designed mentoring, which was really to happen around weeks, five, six, seven understanding that a student might be gone by then and if we don't have an opportunity to start building some relationships, maybe earlier in the term and weeks two and three for example, we might be missing some students that really could have benefited from making a connection and just checking in with someone. You had mentioned earlier; someone asked a question about what if I get a few weeks in and, I realized maybe this isn't the field for me. That's a great faculty mentoring conversation to have. So the sooner, the better I guess as far as that's concerned.

I will also add that one of the things we've been working on here is a coaching framework for all of our student services to work from. So we've been working with a company called inside track to develop I guess our case management skills and really get better at being more transparent with students, normalizing their situations. Sort of featuring a growth mindset and helping students understand what that means. Reinforcing positive help-seeking behaviors and really starting to do better jobs at framing situations, assessing and so forth.

This is all part of the coaching training, and we've now made that available to faculty, and we call it tips and tricks for faculty mentoring, but it's really coaching principals so that they have more support of the *how* to do mentoring versus the *what.* We were pretty good about telling them the what when we fair the process, and they didn't get a lot of support for the how. And so that's been really well received, and I think probably in the next four weeks we're going to see our VP for learning require it for all of our faculty that do mentoring to go through coaching training.

Speaker 4: Quick question, John, do the faculty receive any kind of compensation to be a mentor?

John: They do not. It's part of their expected load; I guess you could say.

Kelly: We have to mention too, we are not unionized, so that makes a difference.

Speaker 4: How many would typically one faculty member mentor?

Kelly: They usually turn the faculty around 20 or 25. Some teams have more though. I mean if it's a one member faculty team and they feel like they want to do their whole new student group, they might have 40 or 50. But I would say that that's very rare. I would say they usually stick around the 20 mark.

Speaker 4: Do you attempt to align the faculty with the student interest like biology with biology and literature with literature?

Kelly: Yes, all of our students who this is for are in an academic programs, so they've already selected a degree, and it's a full-time faculty member for that degree. We did try it, I will say, we tried it with our students who are in; we call it a general studies transfer. So they're really just here for a year and then to transfer on to a four year that did not go as well because the students didn't really have that connection with the faculty. So they got a lower response rate, and I think there's still working through some kinks to figure out how that team will work with the general studies transfer students. But we do not have a two-year transfer degree, like an AAS. It's just those students who come here for a year. So it's a little bit different of a group.

Speaker 3: Did you have any trouble enlisting the faculties or their willingness to do this? I mean, they seem to be doing it, so, is there a ramp-up period?

John: I would say it's like anything else. There's probably some pockets of resistance. There's other teams that were early adopters. In fact, the reason that this went widespread is that we had some faculty teams already doing it and seeing some really good results from a persistence perspective and so it was easier to make the case I think across the academic departments that this is something that they should try to do. And I would say for the most part it goes over fairly well. It's always easier for the cohorted programs. It's a little bit tougher in areas like business where you might have two primary full-time instructors in business management, but you've got 150 new students, and there's a lot of part-time instructors.

So there's this sort of, this balance and this give and take and areas and not every student has the opportunity then to have a mentor. And that's why when we started our academic terms, and we'd go through our in-service process, our faculty teams have a essentially a *student success data day* and they dig into the data relative to their programs and really try to figure it out where are the gaps and what are things we could be addressing as faculty does support student success. And that's one of the conversations really they're having is, who is the group that we should be focusing on in terms of faculty mentoring if we don't have resources for everyone.

Speaker 3: We piloted a faculty advising on our campus but not without controversy, but we made it voluntary, and we had 20 to 25 faculty members for each semester and probably close to a hundred 150 students that participate all voluntary for the students. And the same thing, we paired students by major to faculty in that Major. So it actually, the offer to students went out based on which faculty had agreed to participate. All right. So if we had a lot of math professors, we solicited a lot of math students to engage in that faculty advising session. We did have to pay the faculty to participate, but same thing, the early adopters were all over it.

What made it challenging is that we didn't have a tool to do that. I was going crazy with Microsoft access and pulling data from Peoplesoft and trying to navigate a point. So I personally found it very challenging because I didn't have the tools that Starfish and the way that you use it with the faculty mentoring to do is something I would love to revisit maybe in another conversation because that solves my problem of having to do everything in Microsoft Access.

Kelly: It's so much easier. We've added some elements in the Starfish now too. That can make that like John was talking about that data day, we've added some filters into starfish that are called attributes. So if you're in Starfish, it's an attribute. They can actually faculty can go in, and with a couple of clicks sort for, who are on my new students for the fall of 2018 semester they had a high school GPA less than 2.5 and are on financial aid warning or whatever. We added a bunch of factors in there that they could really slice and dice without having to run a bunch of people off queries and dump it into Excel and all of that we did that for a long time too. Starfish does make it way easier to do some of that.

Speaker 3: How did you do this? I love this idea of *student success data day*. How do you do that with faculty? Do you provide them a tool where they're looking at like if you give them a dataset or do they use Starfish or Peoplesoft?

Kelly: Yes, we have changed that a little bit differently, I think a lot of them use a data warehouse we call it Edware it's just an internal data warehouse that our IT department built. But I think they've used that a lot in the past. I will say they're probably starting to use more Starfish data now. I've been collecting; I send out a weekly general Starfish tracking report that has like all the flags, all the kudos, all the to-do items. I sent out a general here's where you are , buy program how many are raised, how many are cleared. I think a lot of them use that. And now moving forward we're implementing Starfish analytics.

So I can see them in the future for next fall really utilizing the starfish analytics to get at some of that. A lot easier than they have in the past. But yes, it's any number of things. You asked a question about research and analysis. So yes, we do, we have a small IR team, but they do look at the intake results for us, and I do some of that as well. Kind of some basic, like I mentioned before, how many students responded to the referrals and are they still enrolled or are they enrolled in the following term or two terms later? So we've done some of that tracking as far as data. But some of the bigger data we have with our team, and we wait to see, but yes, we'll share it with whoever needs to share it. Whoever wants to see it.

John: In the beginning, we had quite a bit more IR engagement in looking at multiple factors and then looking at some of our demographic information and other financial aid information. So they were able to evaluate several other factors from other systems and just start to get a picture of what does an at-risk student look like versus what does a successful student profile look like. And just start getting into, thinking about who our students are. The challenge we have is we just have so much demand for IR time that it would take weeks and weeks for us to get really anything back. And ultimately we'd be unto the next semester, and their work would get prioritized. So we would certainly love to see more analysis, are returning adult females succeeding better than transitioning male students right out of high school? Those are the kinds of things that we would be able to look at and evaluate and see if there are populations that for whatever reason are telling us that they're worried about being successful that we might be able to connect to.

Speaker 3: I think the way back to early on, you're talking about referrals to different programs. If the students answers all these question and you're forwarding all referral list to different areas. Is there a possibility of student's going to get 10 phone calls?

Kelly: Hopefully not. So it is possible that they will get 10 referrals. That is, 8, not 10 but what we've taught the staff like I said, students don't get notified though. So they would not get bombarded with 10 emails. But what we've taught the staff is do they, before they make any calls or before they reach out to students, go into the student folder and see what else is out there. And if they can address more than one topic, address more than one topic so that you know that you're not getting multiple calls. Now we will say that we didn't use to do that. So when it was in Survey Monkey, we did group things and say if a student has three or more, let's go in this, this order and we won't have them get more than two referrals. And again, that took a lot of sorting and a lot of time, and we really found that there wasn't that many students who had more than three. It was a very small number. So we didn't feel like it was a huge risk moving away from that. And to be honest, since we moved away from that, I haven't counted the number that had more, but I wouldn't anticipate, it's a huge, most of them do just have two, maybe three.

Speaker 3: With the faculty advising where there's some parameters or criteria that you use to train faculties on what do you talk about it and what you don't talk about is the potential mis-advising?

John: So we, we put together, and the only reason I guess I even know that much about it, or maybe Kelly would say this too, is that we were involved with this as an ipass project, but this was really led by learning leadership. But we put together sort of a three-page document on the purpose and the intended outcomes and what would be really good content. What would be good questions to ask? I can pretty well assure you that most faculty don't want to talk about anything related to finances or financial aid. It's rare if we ever have a faculty member I guess talking about things that I guess that has come back as a complaint or any sort of concern that we know of to talk about things sort of outside that scope, for whatever reason they've been really good about recognizing their role and the boundaries of that role, and I mean I can't think of one circumstance where that I'm aware of at least where I'm a faculty member who gave this information cause it was, it's really not so much an advising session. I want to be really clear about that. They still have a program advisor assigned to them as a student. This is really about building a relationship with a faculty member who has worked in that field most likely, who can talk about learning experiences in that field and employers and what a good path might look like. So there's some advising-related content, but it's more about building connections within their program.

Kelly: And the other thing about the process, whether good or bad, is that there isn't a consistent, here are the things you need to talk about. Each faculty team was able to design their session however they wanted. Now we gave them suggestions about here's good things to talk about like John said. But some of them do it during class time, and they meet with each student for five minutes during class. Some of them require the students to come in after class and make a full half an hour appointment. Some of them have their advisors sit in the room with them, and they do it together with their advisor.

Some of them don't talk to their advisor at all about it. So it's really not a across the board, here's what faculty mentoring is and here's what it isn't because it is different depending on the faculty and program that it is. We're trying to get more consistency with, like John said, with that coaching training. And I think that'll help. It will a little bit more consistency about what's happening in those conversations, but still how it takes place, whether it's in the classroom, out of classroom time. Do they get points for it? Is it extra credit? It varies across the campus.

Speaker 3: My colleague and I have been involved in doing the training for Starfish for faculty. Out of curiosity, we've done in-person training that is not very well attended. We've had an online video for our professional development. Are there any, like what have, how have you been successful at delivering these trainings? Because I know that's a lot of information. It's new information. It's trying to create a culture where you're getting people to you. Well, what has worked the best for you?

Kelly: Yeah, so we have a required for faculty, or they go through a series of trainings. So that's where they get their first Starfish is in that required onboarding, the series of trainings. From that point, it's really all of our staff are required to have 40 hours of professional development every year. So they can pick and choose what that is. But their supervisor, a lot of times we'll suggest certain things, or we'll have certain ones that are required as part of that 40 hours. So sometimes like John was saying, coaching, maybe one of those required ones that included in that. we also just try to keep it front of mind. We have an in-service before each semester, so an in-service before the fall semester and spring semester. So during both of those times, I knew judge anybody to go into each department and give a Starfish update about what's new, here's things you need to remember this semester. That's change. Remember you're going to do faculty mentoring and here's how you do it and here's how you open them to do and here's how you clear it. So I've been fortunate enough to be invited into all of those every semester to kind of keep it top of mind.

Speaker 4: Quick question, what is your student population and how many full-time faculty do you have?

John: So we are about 60% full-time faculty if not a little bit higher.

Speaker 4: What number would that equate to?

John: Yeah, we've 270 full-time faculty. And in terms of students, we have about 6,000 FTE and probably 13,000 headcount. Duplicated headcount taking, taking credit courses.

Speaker 4: And last thing. Oh, you're talking about your struggles with a mental health as far as doing a survey. I was curious at the very end, at the bottom of your survey where you have Kelly's email address, what have you could add? Sorry Kelly from making the suggestion of one, if you could add link to a Survey Monkey, like an optional thing, mental health questionnaire, fill this out and just a suggestion you can play around with it.

Kelly: Yeah, my contact information is not on the survey. That is a good suggestion though. And I'm going to look into it. That's a great idea.

Speaker 3: What do you do with your open-ended and data. So when you ask them how they're going to succeed in college and they write something, a paragraph, do you read those?

Kelly: It gives us warm, fuzzy feelings. I don't know. We give it to staff members obviously, so it's another one of those case by case. We've also used it just during staff and services and stuff to kind of have it rolling on a PowerPoint as just motivational. Here's some of the things our students have said. We don't do anything with it widespread. We don't do any analysis of it. It's just kind of there, like John said, to leave the student on a positive note and then for us to use on a case by case as we need it. But some of them are very inspirational, I will tell you that they are amazing to read, so if you ever need a pick me up someday, I'll send you some.

Speaker 4: The faculty has access to those survey answers, correct?

Kelly: Yes.

Speaker 3: I have a couple of small questions. The coaching framework and the advising guide, are those two different documents and is it possible for us to see one of those?

Kelly: So from an advising guy do you mean what we provided faculty around mentoring?

Speaker 3: Yeah.

John: Yeah Absolutely.

Kelly: I can send that.

John: Okay. and then coaching guide, I'm not sure if this is what you're referring to, but in terms of the way we've trained all of our Student Services Staff and coaching framework.

Svetlana: Yeah, that's what... yeah, so those are two separate documents, is that correct?

John: Yeah, and the coaching is a little bit different cause it's, it's really not one document per se. It's, it's like a whole manual that's proprietary to inside track, so that might be a little bit harder. I'm certainly happy to share some of the training that we've been doing in house, which is really based on inside track coaching principles, but we could certainly, we could send along, for example, a presentation of what training might look like in that way.

Svetlana: Would that be of interested to you all? Yeah, that would be terrific, we don't want nothing proprietary but available to share. That would be great. I have one last question, just a couple of minutes. You use the word team a lot, and I was intrigued. I was intrigued by it seems that you apply that to student services teams and faculty teams and so forth. Can you share a little bit more about how you organize yourselves by teams and how you work together? Sounds like all of the teams have ongoing work together. They confer with one another and so forth. A little bit more about how you structure yourselves to do this work.

John: I guess the best thing to say about that is we are a team-based culture. So pretty much everything here is designed around teams, so the college has strategic directions, but teams do their own action planning as it relates to those strategic directions. Teams really do a lot of their own assessment in terms of services with students, track a lot of their own data and there are definitely is an expectation about collaboration and intake survey is a good example of an opportunity to bring teams together and share information more widely and get people working together towards a common end.

But that's, I mean quite honestly that has been, that's been in place since I've been here because I think it was really fundamental to the approach our president brought when he came here 20 years ago, and he's been here that long, which is probably pretty rare. And so that's, that's how we've always operated. And then when we do training, so even around coaching training, I'll just give you an example. We try to have teams go through training together as much as possible so that when we can customize training to specific roles, there's more opportunity to do that.

And so coaching our welcome center staff, or I should say training them on coaching when they might only spend two to three minutes with a student versus an advisor who might spend 45 minutes. We have a coaching training and coaching light training, and we have teams go through that together so that they're processing that together. They're coming up with ideas together. And then we can also customize the training to some degree to that role, which makes it more meaningful, I think.

Speaker 3: Can you give an example of your team in terms of that you have the students services team, and who would be on that team?

John: Sure. So within the student services division, so we have a student services division that has a vice president and three deans. And then each of those deans have multiple teams within their areas. So for example and I talked about this a little bit earlier, but I have a, a manager over our counseling and disability services and I've got Kelly's position who's managing our early alert work, a manager of academic advising, a manager of career services.

And then the other teams will look very similar under the other deans where they have admissions and financial aid and records and support services and involved in all of those different areas. And then our leaders from all of those student services meet probably every other month I want to say as a leadership group, our Dean's team and our VP probably every week, on average. So it's a lot of teams in some ways that, and in some ways, it results in a lot of meetings, which can be difficult, but it does provide for a lot of collegiality and support too. So advantages and disadvantages, I guess.

Speaker 3: Thank you for setting this up and making the connections. And we really appreciate all of your wisdom that you're sharing with us. We'll try and steal all your good ideas.

Kelly: No problem.