



EAST CAROLINA UNIVERSITY

Program Diagnostic

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PRODUCED BY

insidetrack

Statement About COVID-19

On January 20th, 2020, the first confirmed case of COVID-19 was announced in the United States. As of March 3, 2022, there are more than 58.5 million cases of COVID-19, with more than 2.5 million cases in North Carolina. Although new cases do now seem to be slowing, we continue to feel the impact of the virus itself and the related measures to curb the spread. One of the most impacted areas of society is the education sector, specifically higher education. In Spring 2020, colleges and universities had to rapidly transition students off campus and into a fully virtual learning environment, which for many institutions was a significant and abrupt transition. Two years later, the impact of COVID-19 is still widespread throughout college institutions. Faculty have had to navigate transitioning course work and labs to an online space, and students have had their college experience disrupted. Additionally, technology departments must now support students and staff remotely. Numerous students and staff faced security risks as they lost housing, access to food, access to the internet and employment. Communities of color have been particularly affected by the pandemic, with a disproportionately high number of confirmed coronavirus cases and rate of death from the virus. Students across all races were worried about academic success, but Black and Latinx students reported nearly twice the levels of concern around basic needs such as food, housing and bills as compared to their White peers.

As this report is being written and shared, COVID-19 continues to be an evolving part of our collective experience, and it is unknown what the long-term impact will be at East Carolina University. Our goal for this program diagnostic remains focused on sharing observations and recommendations from a perspective of ensuring a positive student experience and supporting the enrollment and retention of students. We believe our recommendations remain relevant, but may also need to be evaluated within the context of the pandemic and potentially applied differently as we seek to emerge from this challenging experience.

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Executive Summary

Summary

East Carolina University and InsideTrack have engaged in a partnership to assess existing student-support structures and identify opportunities to improve student enrollment, persistence and completion rates. This partnership aims to support East Carolina University's success in future program design, training plans, institutional planning, strategic planning and other elements that inform student success. Our program diagnostic set out to do the following:

- Identify areas of strength
- Discover primary obstacles or gaps in current operations
- Develop recommendations for improvement and implementation

To inform our recommendations, InsideTrack conducted virtual focus groups and interviews with current students, stakeholders and staff from Student Affairs, Orientation, Career Services, Parent Programs, Dean of Students, Campus Living, Disabilities Support Services, Academic Affairs (Academic Advising, Office of the Registrar, Admissions, Financial Aid and Scholarships, Pirate Academic Success Center, Global Studies, STEPP Program, and Office of Faculty Excellence).

During our discovery, InsideTrack observed many strengths. We learned that East Carolina University staff are resilient in the face of uncertainty, knowledgeable about barriers impacting student success and deeply committed to serving students. Additionally, East Carolina University is invested in improving diversity, equity and inclusion practices. As such, the existing support ecosystem on campus provides students with ample resources and opportunities to reach their highest potential. East Carolina University also maintains a "small school feel" by fostering a warm and welcoming campus culture that keeps the Pirate spirit alive for both staff and students.

InsideTrack also discovered some key areas of focus for East Carolina University in order to reach our shared goals. The campus has experienced a high rate of change in leadership, initiatives and priorities without adequate change-support processes in place. This has contributed to employee turnover, staff burnout and compassion fatigue. Additionally, East Carolina University's systems and processes are not easily integrated or updated, resulting in errors in student data and delays that negatively impact the student experience. Through this diagnostic, InsideTrack continues to partner with the university in unlocking its full potential to enhance support for all students.

Key Recommendations

Through virtual one-on-one meetings, focus groups and document reviews, InsideTrack has gathered detailed information on which to base our recommendations. We recommend the following:

1. Implement change management recommendations.

Everyone experiences change differently. It will be important to employ change-support principles as East Carolina University implements a nudge system and improves current support structures and as staff members adopt new practices.

2. Refine systems and processes. To address student engagement with communications from East Carolina University, the ideation and implementation of a nudge system will serve the needs of both staff and students. Additionally, streamlining technology systems and accompanying processes will enhance staff capacity to support students and reduce student data errors.

3. Enhance staff satisfaction and morale. Building connections and communication pathways will help staff across departments partner together in their efforts to provide cohesive student support. To address staff burnout, East Carolina University can benefit from collaborating with external partners to meet staffing needs, adopt new staff benefits and improve opportunities for upward mobility.

4. Increase understanding of the student experience to improve enrollment, retention and graduation efforts. By highlighting each step of the student experience through a student journey map, East Carolina University will be better equipped to identify barriers that may hinder student success. Additionally, re-engaging stopout students will address achievement gaps and improve student retention and graduation rates.





Vision

The partnership between East Carolina University and InsideTrack was designed to examine ECU’s current state, identify opportunities to improve student success, and assess existing student-support structures.

To help East Carolina University achieve its goals, InsideTrack conducted a needs assessment of the current departments and systems to pinpoint strengths and obstacles in current operations to create recommendations for improvement.

We intend the recommendations contained herein to serve as the foundation for strategies and tactics that will drive tactics that will drive improvement in the systems and processes that support staff and students at East Carolina University. We also want to acknowledge and leverage alignment between InsideTrack’s services and existing initiatives at East Carolina University.



Methodology

InsideTrack conducted a virtual assessment of East Carolina University's current operations and processes primarily over six days in January and February 2022 to build the foundation of the partnership moving forward. These meetings and discovery sessions yielded important insights about East Carolina University's current state and goals for its future state. In particular, InsideTrack examined admissions and advising processes, resources for students, and existing structures.

During this process, InsideTrack gained an in-depth understanding of challenges, what success looks like and means to the college, and a roadmap for achieving that vision. We came away with a sense of direction for the training needs for staff, an understanding of East Carolina University's culture and student profile, and a better grasp on how current systems impact the student and staff experience.

Scope and Limitations

This program diagnostic primarily focuses on East Carolina University's strengths and opportunities for growth; case studies and quotations from students and staff; and actionable recommendations that will inform future program design, training plans, institutional planning, strategic planning and other elements that inform student success.

The scope of the program diagnostic was to highlight the first-year experience. Due to time constraints, we were unable to capture the experiences of all students. As East Carolina University seeks to improve retention and graduation rates, we recommend they continue to learn directly from students and use their feedback to inform solution design.

Process

InsideTrack followed a four-phase process to identify opportunities to accelerate the needed changes. These phases are:

1. **Launch** the partnership by defining goals and desired outcomes, introducing key stakeholders from each team, and defining a project timeline
2. **Inquire** for more information through materials and the virtual program diagnostic focus groups to learn about East Carolina University's strengths and challenges
3. **Analyze** the information and identify recommendations
4. **Deliver** and discuss the needs assessment findings



Types of Discovery

InsideTrack used the following types of discovery to determine the current state of East Carolina University's environment and processes, as well as to investigate options for achieving goals.

Assigned lead consultant for up to six weeks. This person owned the full process, including determining the methodology for discovery and completing the bulk of the discovery, and was primarily responsible for writing this report.

Site visit for up to two people for six days. A team of two virtually visited East Carolina University from December 15, 2021, to December 16, 2021, and from January 24, 2022, to February 2, 2022. InsideTrack coordinated with East Carolina University to get time booked with a variety of individuals and groups from all levels and departments. The goal was to collect information formally through meetings as well as to gather informal information and experiences.

Focus groups. InsideTrack had group discussions with current ECU students and representatives from Student Affairs, Campus Living, Academic Advising, Registrar's Office, Financial Aid, Admissions Office, Disabilities Support Services and the Pirate Academic Success Center.

Interviews. The discovery team conducted the following types of interviews:

- **Individual and department interviews:** InsideTrack conducted individual and group interviews with leadership and employees from departments including Student Affairs, Orientation, Career Services, Parent Programs, Dean of Students, Campus Living, Disabilities Support Services, Academic Affairs (Academic Advising, Office of the Registrar, Admissions, Financial Aid and Scholarships, Pirate Academic Success Center, Global Studies, STEPP Program, and Office of Faculty Excellence).
- **Student interviews:** InsideTrack scheduled and conducted virtual interviews with current students about their experiences. Students participated from the Honors College, Pirate Academic Success Center and Sophomore Coaching Program.

Documentation review. Prior to the site visit, InsideTrack reviewed a comprehensive list of documents, including summaries of the Pirate Academic Success Center, Academic Advising, Disabilities Support Services and Campus Living.



Key Findings

The following pages describe InsideTrack's findings from the needs assessment. This section includes a high-level SWOT analysis and a more detailed outline of observed strengths, weaknesses, opportunities, threats and key recommendations.

Strengths and weaknesses refer to factors that are internal to your institution. They may be related to internal financing decisions, current processes and workflows, team structure, culture, and the staff and faculty.

Opportunities and threats refer to factors that are external to your institution. They may be related to external financing and local, state or national economic trends; regional or local demographics or natural environment; relationships with vendors; and market trends.

SWOT Analysis Summary

A SWOT analysis is a visual representation of the strengths, weaknesses, opportunities and threats InsideTrack identified during the visit and in review of the submitted documents. The areas of focus identified here will set the stage for further review and detail later in this document.



STRENGTHS

- Staff and faculty are resilient, professional and knowledgeable
- Robust student-support ecosystem
- Campus culture fosters connection and a “small school feel” at a large university
- There is strong investment in student diversity, equity and inclusion



WEAKNESSES

- Lack of change-support processes creates potential for initiative fatigue
- Changes in executive leadership and vision
- Understaffed departments and potential for burnout
- Inability to effectively utilize CRMs and data due to a lack of system integration and documentation



OPPORTUNITIES

- Partnerships with secondary institutions and community colleges to simplify the admissions and transfer process for students
- Collaboration and participation in system-specific initiatives to support enrollment efforts across all University of North Carolina campuses
- Partnering with experts in the education marketplace to utilize new technology that will support student retention



THREATS

- Coronavirus pandemic disrupts higher education in unprecedented ways causing a drain on resources, employee availability and students
- Budget constraints caused by the recent economic downturn have tightened resources and staffing
- Mental health crisis caused by the pandemic, economic and interpersonal crisis

Strengths and Opportunities

It is an exciting time at East Carolina University. The university is engaged in many initiatives with the mission to positively impact student enrollment, retention, and success. It is clear the university is dedicated to serving its students. East Carolina University is focused on leveraging the university vision to serve the community and identifying ways to positively impact student experiences and outcomes.

STRENGTHS

During our virtual visit, InsideTrack had the privilege of getting to know East Carolina University employees who are passionate about student success. They have a deep-rooted knowledge of their students, their students' communities and the challenges they face. Staff and faculty understand the unique needs of the student population and are committed to decreasing the achievement gap. Listed below are the strengths we observed during our virtual visit at East Carolina University.

Staff and faculty are resilient, professional and knowledgeable

The staff and faculty at East Carolina University show passion for the work that they do. They demonstrate awareness of student needs, campus resources and gaps in support. Employees expressed inherent optimism about the direction the college is headed. Many staff members we interviewed are serving on multiple committees. They described assuming responsibilities that fall outside their job descriptions or immediate roles as helpful to fill gaps and ensure that they continue to support students during this organizational change. There is a strong sense of collegiality and support among staff in each department. Countless staff have voiced that they "can count on each other when things get tough." The staff we interviewed are highly dedicated, and many have a long history at East Carolina University and demonstrate a high level of institutional expertise.

Representatives from each department who participated in the focus groups clearly articulated how their department could better serve students; this creativity and awareness demonstrates staff commitment to change efforts. They

are one of the greatest resources for students and will be a critical resource to leverage in achieving the goals of the institution. Additionally, multiple departments have expressed openness and willingness for interdepartmental collaboration as a means to improve processes that will support student success. As East Carolina University continues to grow, there is an opportunity to combine the forces of staff, student affairs and academic affairs to maximize departmental knowledge for the benefit of student advancement.

Robust student-support ecosystem

East Carolina University has developed an infrastructure of support services aimed at meeting student needs, and faculty and staff are well versed in referring students to said services. InsideTrack repeatedly observed that ECU employees were not only aware of resources, but frequently recommended appropriate resources to students such as the Pirate Academic Success Center. One example of connecting students to campus resources is the early alert system, Starfish. According to ECU's website, "Starfish is a communications tool used by faculty to support student academic success."¹ This system allows faculty to identify areas of praise or concern with regard to student academic performance. Alerts are then sent to the student's email and the university support network is notified. There is a tiered level of support that is implemented by the university support network; the support network can more easily identify who is responsible for reaching out to the student with appropriate action and resources based on the situation.

Additionally, East Carolina University has a reporting system in place called ECU Cares. ECU Cares provides faculty, staff and students with a mechanism to "identify individuals on campus who... are exhibiting signs of difficulty coping."² This assessment and referral model is key as it recognizes the individual's specific need, includes a thorough assessment and allows for targeted referrals based on that specific need. An effective assessment and referral model is crucial to affirming student connection to the college and building commitment to their degree. It also empowers institution employees to identify faculty

and staff who may also be struggling. It is a campus-wide effort that supports the safety and well-being of everyone at ECU. Additionally, a strong assessment and referral model reiterates the roles and support systems on campus and fosters efficient resolutions to student and employee needs.

ECU campus culture fosters connection and a “small school feel” at a large university

While there are more than 28,000 students currently enrolled at East Carolina University, there remains a “small school” presence on campus where current and prospective students feel seen, heard and cared for by their peers and staff. Students who participated in InsideTrack’s focus groups cited an appreciation for the sense of community at ECU, noting that there is a genuine investment in each student. A recurring theme among students was that their socio-emotional experience on campus ultimately played into their decision to attend ECU. Many students we interviewed noted that once they toured ECU, they “felt at home” and appreciated the care and consideration they received when they were on campus. Students highlighted several positive features including the camaraderie and motivation they get from their peers, feeling a sense of belonging and community, and having supportive staff around when they are struggling.

We observed a similar theme in our interaction with staff and leadership; leaders were able to speak to the reality of the student experience, demonstrating care and attention to the experiences of being a college student at East Carolina University. In an industry that is often associated with rigid hierarchy, ECU’s leadership demonstrated a high level of availability and presence among frontline staff and students.

There is strong investment in student diversity, equity and inclusion

East Carolina University has already established several programs that have been successful in serving a cross-section of disproportionately impacted students. These programs focus on enhancing students’ social capital by fostering a sense of community, creating social and

cultural opportunities, providing mentoring, supporting the development of academic skills, and instilling a sense of belonging. These programs are leveraging institutional research to focus on outcomes and persistence for the students they serve. East Carolina University was recently one of the 58 institutions named to the First-gen Forward recognition program for its commitment to first-generation students’ advancement and success.³

According to Harvard professor and author Robert D. Putnam, social capital is something valuable that is gained through our networks and general relationships between people. It acts as the “sociological WD-40” that facilitates the sharing of resources and access to knowledge.⁴ Social capital is about the value of one’s network. It’s not about what you know, but it is about who you know. The trust, reciprocity, sharing of information and resources, and general goodwill towards those within a social network produces value for not only the individual but also the group as a whole.

During the program diagnostic virtual site visit, InsideTrack learned of a variety of programs available at East Carolina University that foster social capital by developing relationships and community among students. Examples of programming that foster social capital include, but are not limited to:

- Pirate Academic Success Center Learning Communities
- Campus Living’s Living-Learning Communities
- Disabilities Support Services (DSS)
- Interinstitutional Scholars for Diversity and Inclusion (ISDI) Program
- Partway Home Program
- Project Male Outreach, Retention and Enrichment Initiative (M.O.R.E.)
- Supporting Transition and Education Through Planning and Partnerships (STEPP) Program

These programs and leadership opportunities reinforce East Carolina University’s student-centered approach and genuine interest in advancing each student.

OPPORTUNITIES

By strengthening relationships with the greater UNC system, community colleges and local secondary schools, East Carolina University has ample opportunities to support student enrollment efforts. ECU is also leveraging resources in the education marketplace that will provide innovative ways to interact with students and improve current communication channels to impact student engagement.

Partnerships with secondary institutions and community colleges to simplify the admissions and transfer process for students

East Carolina University has developed partnerships with secondary education institutions and community colleges in order to simplify the process for pursuing higher education. One example of where the partnership with secondary education thrives is the Supporting Transition and Education Through Planning and Partnerships Program (STEPP). The STEPP Program student journey begins in the student's senior year of high school, where the STEPP staff guide the student in "understanding the university, helping them to think about themselves in the college environment and their potential support system." Additionally, ECU collaborates with local community colleges to create simpler degree paths for students who may potentially transfer to a university. By providing guidance, creating support networks, and demystifying the transfer process, prospective students can envision themselves as future Pirates. East Carolina University has the opportunity to expand existing partnerships with these education institutions to make the transition to college possible for all students.

Collaboration and participation in system-specific initiatives to support enrollment efforts across all University of North Carolina campuses

The global pandemic has caused a lot of disruption in both the world and the education landscape. It has increased the need for UNC campuses to work together more closely to improve system-wide student success efforts. East Carolina University and other UNC campuses participate in system-specific college fairs and in monthly working

groups to create events for prospective and current students. Past events include the UNC System Virtual Military Education Fair in April 2021⁵ and the Virtual 2022 Behavioral Health Convening in March 2022.⁶ Collaboration with other UNC system events increases ECU's potential to gain more visibility in the prospective student population, which will improve retention efforts.

Partnering with experts in the education marketplace to utilize new technology that will support student retention

East Carolina University is building out a chatbot nudging system in collaboration with Mainstay to improve student engagement and retention. The platform is in the testing and feedback phase as of February 2022. By partnering with experts in the education marketplace, ECU will be able to personalize their student outreach efforts. The implementation of a chatbot at ECU will positively impact student engagement by providing key touch points and important reminders for students in a digestible format.

Weaknesses and Threats

At the core of this assessment, InsideTrack discovered a group of professionals working hard and thinking critically about how to better support students. The uncertainty, inefficiencies and frustrations exhibited by staff should not be interpreted as a sign of unfitness. Instead, we believe that with direction and clarity, East Carolina University is in a strong position to strategically reach students and positively impact the advising experience, overall student retention and graduation outcomes.

WEAKNESSES

The following areas for focus or improvement were observed during the needs assessment. If not addressed, these areas could potentially lead to challenges in leveraging strengths and opportunities.

Potential for initiative fatigue

East Carolina University has undergone many changes in leadership, as well as competing visions, missions and initiatives that have come from shifting leadership teams over

the last few years. Alongside existing initiatives, additional changes can create an environment rife with the potential for change fatigue. Change-fatigued employees may be slower to adopt improvements made to the system, which limits the impact of the improvements.

Changes in executive leadership and vision

East Carolina University has undergone a tremendous amount of organizational change, including naming two new Chancellors and two new Interim Chancellors since 2016. As faculty noted, “Leadership changes affect families and students. It deters them from enrolling.” Many individuals are still acclimating to the campus environment. Over the last few years, several initiatives have been proposed by new personnel in efforts to improve student persistence. Though there has been some success in results, initiatives have been proposed in a buckshot approach; new ideas are executed in a variety of ways without a unified strategic plan. This not only increases the likeliness of initiative fatigue for those carrying out directives but it also removes the ability to provide statistical evidence correlating specific initiatives with demonstrable success. Leadership changes may hamper the momentum or the ability for East Carolina University to implement changes successfully. Interim, or perceived as interim, positions are not always viewed by staff as positions of power and the existence of these positions can make reinforcing change difficult.

Understaffed departments and potential for burnout

Many staff at ECU across all departments we interviewed shared that understaffing has a large impact on their ability to meet department goals and support student success. Staff shared that they are working at half capacity with advising loads “ranging from 350-600 — sometimes 800 per advisor.”

A large majority of staff have reported that the ability to telework has lessened the impact of being understaffed, but some also reported that being allowed to telework has blurred the line between work and home. Staff from multiple departments reported that they work weekends and evenings to keep up with the demands of the job. Additionally, staff are taking on additional tasks and responsibilities that fall outside of their scope of work to try and meet student needs, while still being expected to perform their daily tasks and meet expectations.

Employees and students also noted that the counseling center and student health center are overwhelmed due to the COVID-19 pandemic and low staffing numbers. Staffing shortages in departments that are directly related to student enrollment and retention negatively impact the student experience. The long-term implications of staffing shortages include burnout, high turnover and undeserving the student population.

Inability to effectively utilize CRMs and data due to a lack of system integration and documentation

Staff at ECU were universal in saying that the institution is awash in data. Student lists, flags, alerts and reports are all very much a key part of daily work. However, we observed two key weaknesses with data: decentralized data collection leading to duplication of work and underutilization of the data.

Because there is more than one system through which data flows, we found that people were doing the same work in different places. Staff reported that they do not have the bandwidth to analyze data and use it effectively since it is decentralized and not well integrated. This duplication of effort creates inefficiencies and confusion, and it can often lead to students falling through the cracks.

The vast amount of data is also underutilized. For example, students are flagged in Starfish, but those flags are not acted upon in a consistent manner. Employees reported that the same small group of instructors are using Starfish while others are not. Additionally, dashboards and other methods of translating data on a regular basis appear to be inefficient. When front-line staff do not have easy, user-friendly access to data, they are unable to work at scale. With almost 30,000 students enrolled at ECU, scaling is essential to ECU’s ability to accurately use data to measure progress and outcomes,

set priorities, and make meaningful change.

THREATS

During our assessment, we heard frustrations expressed about external concerns and uncertainty. The primary threats that emerged are explained below.

Coronavirus pandemic

The COVID-19 pandemic is currently impacting the whole world. The East Carolina University staff, faculty, students and community have experienced significant stress, rapid adjustments and challenges with navigating new work environments and online platforms.

We know that COVID-19 has greatly impacted the entire education landscape, including a decrease in inquiries and retention numbers. Additionally, due to COVID-19, budgets are uncertain, and staff are concerned about the implications this may have on student financial aid as well as staffing shortages. At East Carolina University, Student Health Services has become overwhelmed with COVID-19-related cases and it does not have the capacity to address other student health concerns.

On top of the virus's direct impact, there is also the indirect impact of the pandemic experienced through disruptions to daily life. These challenges include job loss, limited childcare options and in-person school closures, all of which create logistical challenges for both traditional and post-traditional students, particularly on a financial level. Research bears out that COVID-19 is impacting families' ability to pay for school. According to recent reporting from the Washington Post, "a recent Census survey said 16 million Americans have canceled plans to go to college. The biggest reasons given were fears over contracting COVID-19 and not being able to afford college given the economic disruption caused by the pandemic. Students from families that earn less than \$75,000 a year are more than twice as likely to have canceled college plans this semester."⁷ Additionally, CARES Act funding expires on May 1, 2022, which will limit enrolled students' financial aid award significantly. The institution is likely to see an increase in students experiencing challenges with covering the cost of tuition, which could reduce retention.

Budget constraints

Due to the economic downturn caused by the pandemic,

the UNC system has experienced significant budget cuts across all 17 campuses. East Carolina University has limited resources, which requires staff to be more strategic, have higher output and reprioritize responsibilities. The Academic Advising team acknowledged the negative impact that budget restraints have had on their ability to fill vacancies, adjust advising loads and support upward mobility. The Registrar's Office, Admissions and the Financial Aid department staff have also expressed concerns that they are "stretched so thin" that they are unable to operate effectively due to limited resources. This trend has a detrimental impact on employee retention efforts.

Mental Health Crisis

In the midst of uncertainty regarding the pandemic and other personal stressors, there has been a surge in mental health challenges across the nation, as well as on college campuses. An article written by the New York Times noted that "colleges across the country are facing a mental health crisis, driven in part by the pandemic. After almost two years of remote schooling, restricted gatherings and constant testing, many students are anxious, socially isolated, depressed — and overwhelming mental health centers. At a few institutions, there has been a troubling spate of suicides."⁸

High levels of anxiety and depression have been reported by up to 20% of the general student population at East Carolina University. The uptick of cases has resulted in the ECU Counseling Center being overwhelmed by student mental health crises. A student reported that when they decided to seek counseling at ECU they "had to wait two months to see anyone in the counseling center." As a consequence, advising staff have needed to provide mental health support for students, which falls outside of their scope of work and expertise. Many felt like they were "not doing the students a service" because they were not equipped to manage mental health situations. The ECU Cares reporting system has been a vital resource for identifying students and employees on campus who may be in crisis. However, mental health situations on campus are growing in number and severity. Mental health concerns can greatly impact all aspects of the student experience, especially academic performance. Campus-wide efforts to improve mental health services and resources for students are necessary for addressing and eliminating barriers that may hinder student success.



Recommendations

InsideTrack is partnering with East Carolina University to examine the current state of East Carolina University, identify opportunities to improve student completion rates and address existing student-support structures. East Carolina University leadership believes they can support successful implementation, develop a stronger plan and generate better outcomes by enlisting the perspective and guidance of InsideTrack. The following are recommendations for how East Carolina University can move closer to its desired state, based on InsideTrack's expertise as a service provider in higher education.

Implement Change Management Recommendations

While passion for serving students at the highest level is one of East Carolina University's greatest strengths, the duration and rate of change can also lead to initiative fatigue among faculty and staff. InsideTrack envisions embedding change-support principles into each stage of re-design and implementation to support the adoption of changes and to secure the maximum return on investment. Change-support best practices require that program leadership dedicate resources upfront to understanding and tending to the needs of their people. Successful change support will mitigate the risks associated with employee turnover, disengagement and resistance. East Carolina University's engagement with change management strategies will be critical to their success.

InsideTrack recommends that change-support strategies focus on the following across all themes:

- Ensuring that current state, transition state and desired state are clear for all who are impacted
- Confirming that executive sponsorship remains active, visible and approachable throughout implementation
- Communication planning (using Prosci principles), including recognizing process and successes and providing team-wide updates
- Identifying potential resistance and planning ongoing resistance management
- Performing formative and summative assessments (such as an ADKAR survey)
- If relevant, connecting business outcomes and learning outcomes so staff know the purpose of university partnerships and initiatives

Prosci defines ADKAR as “a research-based, individual change model that represents the five milestones an individual must achieve in order to change successfully.”⁹

ADKAR stands for:

- Awareness of the need for change
- Desire to support the change
- Knowledge of how to change
- Ability to demonstrate new skills and behaviors
- Reinforcement to make the change work

Additional change-support tactics may be deployed on an as-needed basis. These may include:

- Engaging and utilizing executive sponsors
- Managing ongoing resistance
- Learning how to manage and lead people through change

InsideTrack’s operations professionals are Prosci® Change Practitioners, a firm whose methodologies are employed by the largest corporations, governments, not-for-profit organizations and academic institutions in the

world to help them change more successfully. Manager mentoring is an additional service offered by InsideTrack that develops managers’ knowledge and capability to support staff through change processes effectively.

Refine Systems and Processes

Staff at East Carolina University work diligently to ensure that student needs are met, but the lack of system integration leads to errors and delays that negatively impact the student experience and often result in duplicated efforts from staff. Additionally, student engagement has been especially low in the midst of the pandemic, resulting in unanswered email notifications and alerts by students and staff. For East Carolina University to address these challenges faced by students and staff, innovations to nudge strategies and streamlining systems and processes will be essential. With efficient processes and systems in place, East Carolina University will be able to better serve the student population and ultimately improve staff capacity.

Build out the chatbot to implement a nudge system

In general, institutions have been slow to implement mobile-based communication tools. There is minimal research about how to design successful programs and the potential positive impact within higher education. The most robust studies are being done by Ben Castleman, associate professor of education and public policy at University of Virginia. Castleman’s oft-cited studies describe how text messages, or “nudges,” can be used with students to drive behaviors and increase student success. A nudge, a concept popularized by Richard H. Thaler and Cass R. Sunstein in their 2009 book by the same name, is defined simply as anything that alters human behavior in a predictable way.¹⁰ Castleman’s studies have utilized nudges in the form of text messaging to:

- Increase the number of incoming college freshmen who start school in the fall by reducing “summer melt”
- Support community college students in persisting from their first year into their second
- Increase the number of students who successfully complete the FAFSA

A second interesting study about the impact of text messaging was done by Commit!¹¹, a partnership of 150+ organizations and 100+ community experts in Dallas County working to improve student achievement and career opportunities. In the summer of 2015, 11 colleges and four school districts in the Dallas area partnered to use text messaging to nudge recent high school graduates about important deadlines and to provide additional support. 1,041 recent grads out of a pool of 2,335 (45%) opted in to be texted. The result was that across every demographic, students who opted in to be texted were enrolled by fall at a 13% higher rate than their peers who did not receive texts.

Based on usage trends, East Carolina University student feedback and research, implementing text messaging is a viable method that ECU could leverage to better engage its students.

Streamline system processes and document initiatives

The lack of integration of systems currently in place negatively impacts East Carolina University staff's ability to efficiently accomplish daily tasks and meet students' needs. When systems and processes don't align, it causes challenges and delays that may hinder student enrollment and retention efforts. Additionally, InsideTrack observed the need for more documentation of new and existing initiatives at East Carolina University.

Adapt business processes to match Banner functionality

We are recommending that East Carolina University evaluate business processes and adapt them to match the functionality in Banner to better meet the needs of the online and flexible learning students.

- We are recommending a cross-functional Banner team with assigned outcomes due each quarter.
- We suggest that the team is composed of a Banner expert, a business-process expert for the functional area and a senior leader who understands East Carolina University policy related to local, state and federal regulations. Decision-makers should consult operational staff and critically evaluate where time is currently spent.

As an outcome of the functionality review, staff may require additional training on Banner and the ways they should use the tool.

Automatically process transfer credits for every student who provides transcripts

Post-traditional students are generally concerned about receiving credit for their past educational work. As such, we recommend that East Carolina University automatically review and provide evaluations of transfer credits to students who submit transcripts.

Make all forms available as web forms that can be electronically signed

East Carolina University has already taken critical first steps in creating virtual and online processes for students in the midst of the pandemic. InsideTrack recommends that East Carolina University continue to build out their electronic processes for students. One of the key areas of improvement for this is converting all forms a student would need to complete into web forms.

Best practices in creating web forms:

- Ensure form security
- Only collect the info you really need (mailing address, for example) and be cautious with collecting information that is sensitive (for example, collect student ID instead of SSN)
- Inform students about what happens next after they submit the form
- Offer notes or information that can help them fill out the form
- Make the form logically ordered
- Show examples in the form field (for example, abc@Xmail.com in the email field)
- Allow users to toggle through the form using the tab key
- Offer likely default values
- Deliver clear error messages

- Save previously entered data in case the form is rejected
- Make it clear what is required and what is optional
- Ensure every form can be electronically signed
- Follow up after the form is submitted with either a page refresh or an email notification

Every form that is required for a student to enroll should be available as a web form. We noted that the following web forms need to be created as a priority: Re-entry/Change of Program, Fee Waiver and a universally used Transfer Credit Evaluation form.

There are two ways that institutions typically handle forms related to student situations that present a risk to a student's conversion or retention. In these cases, a student may need staff or faculty intervention. These cases can be handled in the following ways:

1. Institutions don't process forms until a staff member communicates with the student
2. Web forms do not have a live link on the site; rather, staff deliver the link after they communicate with the student

Document new and existing campus initiatives

InsideTrack was unable to locate documentation of new and existing initiatives happening on campus. While many staff members were informed about existing initiatives on campus, the interpretation of these initiatives varied, and there is little to no documentation available for review. InsideTrack recommends that East Carolina University implement a process for documenting current and future program and campus initiatives. Documenting program and campus initiatives will provide clarity for both staff and outside partners to better align with East Carolina University's initiatives and be more apt and better equipped to support their vision, expectations and outcomes.

Enhance Staff Satisfaction and Morale

The staff at East Carolina University are passionate about the work that they do and are invested in improving the student experience. It became apparent to InsideTrack that the staff at East Carolina University are one of its greatest assets. In our interviews with staff, many expressed a strong desire to increase collaboration across departments to improve communication and streamline processes that will positively impact the student experience. Additionally, our interviews with staff also uncovered that understaffing and low staff morale stood out as primary pain points that hindered staff from effectively supporting students. If these challenges are not addressed, East Carolina University runs the risk of losing valuable, dedicated employees. InsideTrack recommends that East Carolina University increase their staff recruitment and retention efforts, and that leadership across departments work together to foster collaboration across campus.

Improve cross-department collaboration

During the virtual site visit, staff from all departments expressed the desire to break down barriers of communication that exist across departments. East Carolina University has already taken steps to improve cross-department collaboration by planning to engage in an InsideTrack facilitated student journey mapping experience in the near future. InsideTrack's recommendation for addressing silos is for faculty and professional staff advisors to meet on a regular basis to discuss program changes, review strategies to support retention and graduation goals, identify collaborative opportunities and process improvements, celebrate wins, and build relationships and trust. Regular meetings will ensure that departments are in constant communication and remain accountable to one another. Meetings should be planned and facilitated to ensure that issues and conflict do not go unresolved and that there is cohesion and continuum of care throughout the students' advising journeys. Meetings are an opportunity to cultivate community and build an understanding of what others are doing. While we acknowledge variances across the colleges, we suggest that faculty and staff advisors across all colleges also meet regularly for the cross pollination of ideas and the same reasons stated above.

East Carolina University would also benefit from having more centralized, tailored communication to support internal processes. InsideTrack recommends East Carolina University update their internal website so that each department has a page that highlights the work they are doing and information that needs to be shared with other departments. We envision this website as a starting place for a larger initiative of centralizing information into a singular location that is easily accessible for all East Carolina University employees. Examples of communications, that can be added to the website, if not already present, include:

- **Roles and responsibilities.** Outlining how each department interacts with students and when to refer students to that department. This could be written text or a visual process map.
- **Upcoming events and announcements.** A place to share upcoming departmental events and how other departments can promote those events to students.
- **Changes in workflows.** Provide details on upcoming departmental process changes that will impact students and other departments and where individuals can reach out if they have questions.
- **Student wins.** An opportunity for departments and employees to share student success stories so that the entire college can celebrate.

It will be up to East Carolina University to decide what information will be required on departmental web pages and what will be optional.

Increase staff recruitment and retention efforts

East Carolina University is experiencing staffing constraints and challenges with recruitment, resulting in staff burnout, turnover and vacancies in crucial positions. By collaborating with external partners and prioritizing employee satisfaction, East Carolina University can increase bottom-line profits and improve productivity and performance across departments.

Collaborate with external partners to meet staffing needs

Despite recruitment efforts at East Carolina University, there are still large staffing shortages across departments

on campus. One staff member noted that their department was actively recruiting but still had “10 open positions that haven’t been filled.” Another staff member noted that they have been “understaffed for over five years now.” Due to persistent staffing constraints, InsideTrack recommends that East Carolina University engage external partners to meet staffing needs for vital student services.

Both East Carolina University staff and students agree that there are not enough mental health services available to students. In the current state, advisors are being tasked with undertaking student crisis situations that they are not well equipped to handle. With the ECU counseling center being overwhelmed, advisors expressed the need for additional support with students in crisis. It is not uncommon for advisors to receive communication from students that indicate they are struggling with mental health issues or having an emergency. Advisors share that they are unsure about which resources they can provide to students. The lack of staffing for mental health services is a significant risk for the university and causes advisors undue stress that can lead to burnout.

In response to staffing constraints and the increased need to support student mental health concerns, we recommend that East Carolina University engage partner resources to bridge the gap. Support from services such as InsideTrack retention coaching leads to increased capacity for advisors to manage current duties and day-to-day tasks without the need to bear the brunt of undertaking student situations outside of their scope of work. InsideTrack coaches partner with students to help them identify necessary knowledge, beliefs and attitudes for success increase self-advocacy; and take responsibility for their success. Retention coaching has built-in coordinated Crisis Support Services. Crisis Support Services provides immediate support for students experiencing a crisis situation by connecting them to on- and off-campus resources that can triage their immediate situation. This takes a weight off of staff who may not feel equipped or comfortable addressing crisis situations and topics with students, and alleviates compassion fatigue because the InsideTrack coach will connect students to campus and community resources and intervention services necessary to address student needs.

Highlight existing benefits for employees

We recommend that East Carolina University find ways to creatively highlight employee benefits that already exist. From the various staff we interviewed, there seemed to be a gap in awareness of the benefits provided by the campus. Some staff voiced that they were hearing about employee benefits for the first time from other staff members. Benefits that already exist include the Staff Assistance Program, teleworking and education benefits. In addition to the HR web page available to staff, East Carolina University can periodically provide visibility for these services through communication channels that employees engage with on a regular basis.

Offer benefits and upward mobility for employees

In addition to the resources that East Carolina University provides, there is room for expanding benefits and opportunities for employees. InsideTrack learned more about what staff would see as potential benefits and opportunity for upward mobility. Below are a few of the recommendations that staff expressed to InsideTrack:

- “A title promotion should be considered at an end-of-year evaluation once someone has been employed for two to three years”
- “Individual departments do have discretion to provide bonuses outside of the state budget”
- “Adjust our titles to reflect our work responsibilities”
- “Corporate recruiters should receive commission if they exceed recruitment goals”

Other suggestions mentioned by staff included free parking, parking options closer to their offices, more freedom to telework, free access to the Student Recreation Center and childcare assistance. While this is not an exhaustive list, InsideTrack recommends that East Carolina University lean on staff expertise to understand what benefits and upward mobility opportunities may be possible outside of currently existing structures.

Increase Understanding of the Student Experience to Improve Enrollment, Retention and Graduation Efforts

The unique experiences and diversity that students bring to East Carolina University keep the Pirate spirit alive. By placing a spotlight on the student experience, East Carolina University will develop an awareness of barriers that may hinder student enrollment, retention and graduation and be better equipped to address achievement gaps experienced by stopout students.

Re-engage students who have stopped out of school

From our discovery, we learned about the re-enrollment initiatives that are taking place across UNC system campuses. To close the attainment gap, InsideTrack recommends that East Carolina University partner with InsideTrack to implement our Re-enrollment and Strong Start Coaching Program on campus. InsideTrack coaches re-engage stopped-out students by highlighting the value of completing their education and partnering with the student to create a plan for completing their studies. The Re-enrollment and Strong Start Coaching program aim to advance equity by providing all students an opportunity to complete their education, boost enrollment and completion rates, and produce a strong re-enrollment return on investment.

Create a student journey map

We recommend that East Carolina University complete a student journey map that outlines the entire student experience from admission to graduation from a student’s perspective. InsideTrack will assist East Carolina University in mapping and visualizing the unique journey of their students and pinpointing strengths and changes needed. With insights gained from the current state, we also recommend identifying the key pain points and strategies to inform strategic communications from

admittance to graduation. This process will allow East Carolina University to identify the following key areas:

- Retention and graduation risks to establish and implement early and proactive interventions
- Transition points for students and how these impact retention and graduation
- Equity practices that support student success and any other gap areas that need to be shored up to ensure an equitable experience for all students

The process of journey mapping also supports clear delineation of who is responsible for what and when among professional staff advisors and faculty. Mapping centers on asking questions such as: What do students need to know, understand and experience at East Carolina University to be successful?

Designing a desired student-experience map will not only highlight communication priorities, but can also be utilized to better understand service delivery and opportunities to yield the greatest impact. In addition to increasing efficiency and eliminating redundancy, this increased visibility fosters trust between departments, an increase in role clarity, and the ability to effectively communicate with and prioritize student needs. Some themes that could be

incorporated into a student journey map include:

- Year One: Understanding East Carolina University systems and student resources, and transitioning to college-level work
- Year Two: Choosing a major, and career introduction and exploration
- Year Three: Evaluating progress towards degree completion (proactive examination of unrestricted electives, understanding internship requirements, etc.)
- Year Four: Completing requirements for graduation and career guidance to assist the transition from academic to professional world

An initial investment in mapping the student journey will take place in the spring in the form of a student journey map focusing on the student journey from admission through the conclusion of the first semester of a first-year student. This is a pivotal time to inform communication and collaboration, affecting yield, persistence and retention. Virtual one-on-one sessions with students will take place, as well as on-campus facilitation of sessions where cross-departmental representatives will engage in hypothesis mapping to explore what students are doing, thinking and feeling throughout their journey.





Conclusion

East Carolina University is an innovative and resourceful institution with ambitious goals. Students and staff at East Carolina University have demonstrated persistence and grit in the face of challenges, including ongoing leadership changes, overstretched staff and faculty, and navigating life in the midst of a global pandemic.

This report is designed to outline how East Carolina University can leverage the collaborative efforts of all departments to improve the current state of the institution

by improving systems and processes, increasing staff satisfaction, and better understanding the student experience, with change management support at the center.

Ultimately, InsideTrack's recommendations seek to build on East Carolina University's strengths — including dedicated and hard-working staff and an institution-wide commitment to student support — to ensure that changes are sustained beyond the end of the current partnership.



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Appendix A: Glossary of Terms

ADKAR: ADKAR is Prosci's model of individual change. ADKAR stands for:

Awareness of the need for change

Desire to support the change

Knowledge of how to change

Ability to demonstrate new skills and behaviors

Reinforcement to make the change work

DSS: Disabilities Support Services

ECU: East Carolina University

EOP: Educational Opportunity Program

ISDI: Interinstitutional Scholars for Diversity and Inclusion Program

M.O.R.E: Project Male Outreach, Retention and Enrichment Initiative

PASC: Pirate Academic Success Center

Prosci: Founded in 1994, Prosci is a change management firm focused on helping individuals and organizations build change management capabilities. Best-practices research acts as the foundation for Prosci's world-renowned change management training programs and tools, including the Prosci ADKAR® Model. Prosci has certified over 30,000 change leaders worldwide through the Prosci Change Management Certification program.

STEPP: Supporting Transition and Education Through Planning and Partnerships

UNC: University of North Carolina system



Appendix B: Visit Schedule

Wednesday, December 15, 2021

TIME	MEETING TYPE	PARTICIPANT(S)
3:00 PM - 4:00 PM	Pirate Academic Success Center	Philly Solano, Amber Arnold, Monique Barrett, Omari Tait

Thursday, December 16, 2021

TIME	MEETING TYPE	PARTICIPANT(S)
10:00 AM - 11:00 AM	Academic Advising Directors	Steven Asby, David Bucci, Amy Shannon, Elizabeth McAllister, Kellie Dill
11:00 AM - 12:00 PM	Academic Advising Directors	Jennifer Cabacar, Tessie Guidry, Erin Beaman, Abby Paul, Kevin Williams

Thursday, January 20, 2022

TIME	MEETING TYPE	PARTICIPANT(S)
11:30 AM - 12:30 PM	Diagnostic Kickoff Meeting	All participants gathered for an hour to learn about ITK and the Virtual Solutions Diagnostic and ask initial questions. InsideTrack Team was introduced by Dr. Elizabeth Coghill.

Monday, January 24, 2022

TIME	MEETING TYPE	PARTICIPANT(S)
12:00 PM - 12:30 PM	Associate Vice Chancellor / Senior Operating Officer	Chris Stansbury
12:30 PM - 1:00 PM	Executive Director, Office for Faculty Excellence & the STEPP Program	Sarah Williams
1:00 PM - 2:00 PM	Student Affairs Campus Partners	Karen Smith, Tom Halasz, Stacy Sanford, Carter Fenwick, Jeremy Tuchmayer
6:00 PM - 7:00 PM	Student Group A	Isabel Campbell, Joseph Sanchez, Tavian Jordan, Aysha McLaughlin, Kaleigh Adams, Imani Simmons

Tuesday, January 25, 2022

TIME	MEETING TYPE	PARTICIPANT(S)
11:00 AM - 12:00 PM	Campus Living (Residence Halls)	Aaron Lucier, Waz Miller, Esme Cabral, Robert Livingston, Bailey Steckbauer
3:00 PM - 4:00 PM	Academic Advising	Jana Hill, Kelly Reddick, John Trifilo, Leann Ethrifge, Brad Mcallister, James Rudd, Kiya Bolds, Daniel Wiseman
4:00 PM - 5:00 PM	Registrar	Karen Rupp, Novine Kros, Josh Dail
6:00 PM - 7:00 PM	Student Group B	Athena Ward, Jessica Copeland, Micah Seetoo, Emily Whitener, Nicole Ewing, Shelby VanHoozer, Kamesha Winn, Cassidy Fitz-Randolph, Princess Brockington, Rupatun Win, Isabel Campbell, Alexandra Nehoda

Wednesday, January 26, 2022

TIME	MEETING TYPE	PARTICIPANT(S)
11:00 AM - 12:00 PM	Financial Aid and Scholarships Office	Bettie Lamb Westbrook, Lauren Daniels, Jeff Evans, Laurena Jarman, Melonie Tyson Bryan
12:00 PM - 1:00 PM	Neurodiverse Student Supports	Katherine Krieger, Nancy Ausherman, Kristina Page, Emily Johnson, Danielle Dietz, Adam Denney
1:00 PM - 2:00 PM	Admissions	Robert Olewine, Curnisha Jones, Justine Okerson, Emily Schultz, Alex Williams, Estephany Molina
6:00 PM - 7:00 PM	Student Group - Honors College	Madeline Hill, Kendall Brockman, Conner Nelson, Megan Mitter, Kamilah Muhammed, Lexi McCoy, Kevin Green-Marshall

Thursday, January 27, 2022

TIME	MEETING TYPE	PARTICIPANT(S)
11:00 AM - 11:30 AM	Director of Financial Aid	Julie Poorman
12:00 PM - 1:00 PM	Sophomore Coaches	Karen Kus, Brittany Wood, Bill Malett, Hector Molina, Morgan Everett

Friday, January 28, 2022

TIME	MEETING TYPE	PARTICIPANT(S)
10:30 AM - 11:00 AM	Associate Vice Chancellor, Chief Academic Success Officer and University Registrar	Angela Anderson
12:00 PM - 12:30 PM	Assistant Vice Chancellor and Director for Admissions	Stephanie Whaley
1:00 PM - 2:00 PM	Student Group - Tutors & Mentors	Bryan Belttari, Bethany Martin, Natasha Melappalayam, Cierra Powell, Matthew Stengrimm, Rupa Win, Harrison Fortney, Cortland Toomy, Tyler West, Kody Beddard

Wednesday, February 2, 2022

TIME	MEETING TYPE	PARTICIPANT(S)
11:30 AM - 12:00 PM	Director for AAH College of Arts and Sciences	LeAnn Etheridge

Appendix C: Solutions Diagnostic Document Request

In order to prepare for the onsite Solutions Diagnostic interviews, the following items are requested. These materials will help InsideTrack build a comprehensive picture of your organization and ensure that we dig deep into the most relevant areas during our time together.

These are the standard documents that we request; however, please feel free to send any additional information or materials that you feel will be helpful in building understanding about the current state of the organization.

Furthermore, we understand that some of these materials may not exist at this time. **If materials do not currently exist, please do not create them.** Knowing what is not available provides valuable information to our Solutions Diagnostic team.

All information shared with InsideTrack will be treated as confidential and only used to achieve our partnership goals.

- **Contact List:** Contact information (name, title, email and phone) for all those who will be involved in the Solutions Diagnostic
- **Organizational Chart:** Map of Student Services/Student Affairs and any key intersecting departments
- **Operational/Strategic Plan:** Communication of the current institutional goals, actions/strategies to achieve them, and resources allotted or being considered; documentation of current grant-funded or other institution-wide initiatives underway that may impact areas for assessment
- **Mission and Vision:** Any overall or high-level guiding principles, statements, etc.
- **Diversity, Equity and Inclusion (DEI) Statement Accessibility Statement; or DEI-focused documentation:** Approach to DEI and supporting documentation such as student, staff and faculty resources; what roles support the DEI focus/goals and how do they do that; DEI recommendations or support for student communication
- **Management Structure:** Format and frequency of staff meetings, employee development sessions, etc.
- **Job Descriptions:** Duties, skills and qualifications required/desired for student-support staff (advisors, coaches, frontline staff) and managers
- **Staff Information:** Average tenure of student-support teams, average turnover rates, biographies/background information (e.g., level of education, work history), and concerns or political considerations regarding staffing
- **Recruiting/Hiring Processes:** Overview of recruiting/hiring process for student-support staff and managers; relevant details about issues or success in hiring for specific roles or desired skills
- **Training Materials:**
 - Employee handbooks, documents provided to student-support staff and managers during the onboarding process
 - Guides or “cheat sheets” for student information/management systems

- **Professional Development Information:**
 - Internal certification information and information on other opportunities offered to employees (e.g., education benefits, internal promotion initiatives, etc.)
 - Ongoing/advanced training materials
 - Employee performance review template/rubric
 - Existing capability to observe student interactions
- **Student Orientation/Welcome Materials:** Samples of student orientation events (recordings, slides, schedule); attendance requirements; features and topics covered; any checklists provided to admitted or enrolled students
- **Scripts and Meeting Plans:** Materials created for student interactions, including call scripts, prompts, meeting guides/outlines, etc.
- **Student-Facing Written Communication:** Text/email templates, newsletters or snail mail communications that are sent to students from the point of enrollment through graduation; outline/calendar of communication campaigns
- **Survey Outcomes and Data:** any surveys that have been completed that are connected to the scope of our work either directly or indirectly, including quantitative data and qualitative trends or individual responses
- **Advisor/Student Workflow:** Process or journey maps outlining when and how student-support staff are introduced to students, communication expectations (frequency, follow-up), and how these processes are monitored or measured for impact
- **Student Online Resources:** Student portal screenshots or test log-in credentials, LMS screenshots, test log-in, or sample courses
- **Retention/Persistence Results:** Historical retention/persistence results and information on how these are tracked and reported internally



Appendix D: Document Review List

Shared by East Carolina University

- **Disability Support Services Summary**
- **Campus Living Summary**
- **Pirate Academic Success Center Summary**
- **Pirate Academic Success Center Overview**
- **Academic Advising Overview**



Appendix E: Text Messaging Strategy

Overview of Strategy

Text messaging and in-app messaging are tools in a student-support professional's toolbox, but they need to be applied properly in order to be effective. The most important things to remember when building an effective text message strategy are:

1. Limit the number of staff and faculty who are able to text message prospects and students at any given time. If too many divisions are texting without a strategy around how the channel is used, students will reply with a STOP message, which will cut off East Carolina University's ability to text students at the gateway and limit ECU's ability to send very important information to students. It is typical for institutions to select one or two people at each point in the enrollment and educational journey who are authorized to text students.
2. To be a valuable tool, text cannot simply be a way to provide the same information sent in an email to students. Instead, texts should be carefully used in concert with other communication methods. We recommend below a number of ways to incorporate text into East Carolina University's communication strategy.

Use text message for:

Appointment scheduling

Text messaging is a highly effective tool for scheduling meetings with prospects and students, especially if the student population is largely composed of adult students who work or have families.

Providing information

Institutions are also using text messaging to provide detailed information to prospects and students. For example, rather than leaving a voicemail, which must be transcribed, a text message can be a convenient way for a prospect or student to receive the email address or phone

number of a division office. It can also be an excellent way for staff to follow up with a student after a phone conversation in order to ensure that important details are not forgotten. Additionally, text messages are much more likely to be read, and read sooner after delivery than emails, so text messaging is a very effective way to ensure that prospects and students actually read the information.

Nudging students to take a specific action

In their book *Nudge*, Thaler and Sunstein outline nudge principles, and much of their research is applicable to text messaging. Student services are set up to support students in taking action and developing behaviors that are most likely to result in a prospect enrolling in the client university or a student graduating, and we should use nudge principles to encourage those behaviors. In fact, nudges are most effective when the following is true of the individual's choice:

- Costs now, benefits later
- Medium-high degree of difficulty (picking the right mortgage v. loaf of bread)
- The choice will be made infrequently in one's life (non-habitual)
- Limited feedback that the individual is on the right track

All of these conditions are present when a student is making decisions about their education.



The list below includes a number of tips and examples based on the book *Nudge* that are applicable to using messaging to communicate with students.

- People like to know what others are doing and will often **“follow the herd.”** So by informing students of what others are doing that is positively contributing to their success, we can shift behavior. Examples:
 - *Many of my students are registering for classes this week to avoid the last-minute rush before classes. Have you registered yet?*
 - Compare two approaches to students taking off the summer, which we know can result in students not returning. You can see how the first example is much more likely to encourage a student to remain enrolled, which can increase their likelihood of retaining into the following session.
 - Example 1: *Many students who want to keep up their momentum stay enrolled in the summer. Have you considered taking classes?*
 - Example 2: *Lots of students take the summer off so is that what you are doing too?*
- When you **measure people’s intentions**, it affects their conduct. In essence it “primes” the decision in their mind, and it can be even more powerful if staff ask students how and when they plan to do it. Example:
 - *Do you intend to apply this week?*
 - Yes
 - *Great, here is the link to the application. I’ll watch for your application to come through. What day and time do you plan to do it?*
- **Provide structure** for complex choices to support the decision-making process. “The more, the better” is not true of choices — by helping students narrow down their options, they are more likely to make a decision and act on it, instead of feeling overwhelmed and stuck, remaining in the status quo.
 - *What’s the most important factor as you consider your school options?*
 - *Based on what you shared with me, these three programs are likely to be most interesting to you: X, Y, Z.*
- Use nudges as **self-control strategies** to avoid temptation:
 - Help students identify temptations; what strategy they’d like to utilize; and how to utilize text message nudges in order to hold them accountable, provide reminders and encourage them.
 - Leverage incentives. Help students be creative about what incentives they put in place. These can be powerful nudges to change behavior.
- Consciously **set a default**. Defaults are powerful nudges because of status quo bias, inertia and conforming — long story short, the default is likely to remain the choice. What is the choice when a student does nothing?
 - Imagine the differences in outcomes in these two scenarios. Default 1 is going to result in dramatically more students receiving nudges and thus more opportunities for Student Services professionals to impact them:
 - Default 1: students continue receiving automated nudges unless they opt out
 - Default 2: students will not receive automated nudges unless they reply to our initial message with “opt-in”
- **Expect errors** and proactively address them. For example, car manufacturers knew that people would forget to buckle their seat belts, so the car dings to nudge the person in the right direction. When we can anticipate errors, we can help students avoid them.
 - *When filling out the FAFSA, be sure to select X as that can be hard to see and if you don’t select it, Y happens.*
- **Give feedback** to affirm students’ decisions or encourage different ones. As we know, feedback is crucial to nudging students and prospects in the right direction.
 - *Congratulations on completing your application! You are one step closer to your goal of earning your bachelor’s degree.*
 - *Great job starting your application. According to my notes, we are waiting for you to send transcripts and take the placement tests. Once that is done, your application will be complete. When do you anticipate completing these steps?*

Engage Deeply Using Text

Text is an effective method for scheduling appointments and sending reminders, information sharing, and nudges. Additionally, when skillfully done, text can also be effectively leveraged to deliver more developmental support to students.

Educational researcher and InsideTrack consultant Ben Castleman sees opportunities in the future for expanding and deepening text-based interventions for students in order to lead to even greater outcomes. In a 2014 interview,¹² Castleman said:

We consistently find that students are quite willing to engage through text messaging as a medium. We've used this to help students get informed about a summer class they have to complete to successfully enroll. We've also used this work to help students renew their financial aid and continue in college... There's really great potential to extend the personalized text messaging strategy and combine [it] with these mindset and social belonging interventions at other stages in student learning trajectories.

But how do we create effective, personalized interventions for students or prospects that may work independently or in conjunction with a more automated nudge strategy? A Slate magazine article summarizing Castleman's findings sums up the challenge. "The bottom line is that text message crafters need to really know the people they're trying to reach, understand the obstacles they face, and open the door to questions and conversation. Simply texting students tons of information will backfire."¹³



The following recommendations are not intended to be a comprehensive overview of quality, but to provide some basics for the foundation of quality interactions related to text messaging.

- **Personalize messages**

- This can mean anything from including the student's name to making sure the content of the message is relevant to the student's program, goal or situation. Even mass messages can be personalized by creating carefully crafted messages targeted for different groups.
- A 2010 study by Karlan et al. provides evidence to support this finding. People opening up a savings account were asked to set a savings goals. Those who received general text reminders to save ended up saving 6% more than the control group, but those who received text reminders personalized to the goal they had set saved a full 16% more than the control group.¹⁴

- **Authentic tone and engaging language**

- Communicating in writing leads some people to adopt a more formal tone than they would use in a conversation. It's key to adopt a tone that is professional but not overly formal. It has been demonstrated that people respond more positively to texts containing informal language such as "hey/hi" instead of "hello," "yeah" instead of "yes" and using contractions. Also, generally people respond more favorably to messages in which the last sentence does not end with a period, which can be interpreted negatively.
- Avoid stock phrases or overused language, which our brains tend to gloss over because of their familiarity. Try to find a slightly new way to say the same thing. For instance, "Registration is now open. Don't forget to register for fall term." could be rephrased to be more specific, urgent and engaging by slightly changing the message to: "Registration is open for 10 more days. When do you plan to register?"

- **Timely responses**

- Expectations for response time may vary depending on the mode of communication. While email responses are generally expected within one or two business days, text messages tend to be a more immediate form of communication. Some tips for meeting or managing response time expectations:

- Schedule time for a text meeting. Just like with a phone meeting, schedule time to focus on texting with a student in order to provide targeted and timely support.
- If a staff member is in the middle of a text exchange with a student and will be unable to respond, set that expectation for the student. For instance, "I will be in meetings for the next few hours, but I will get back to you this afternoon."

- **Utilizing proven interventions**

- Some proven interventions are easy to implement via text. A few examples follow, but there are many more.
- Planning prompts have been shown to have a positive effect in many areas, including voter turnout. In one study, one group received a reminder to vote on election day. A second group received a reminder followed by three questions: 1) Where will you vote? 2) When will you vote? and 3) How will you get there? The group who were asked the planning questions were significantly more likely to vote than those who just received reminders. A similar strategy could be applied to registration, application completion or other goals a student is working toward.
- Motivational framing is an effective technique, but it works in a counter-intuitive way. Framing a message positively has not been shown to have a significant effect upon an intended outcome. Conversely, people tend to fight harder and achieve significantly better when the issue is framed negatively. In one study, students who were sent an email saying that they were doing worse than a certain percentage of the class studied more and performed better on subsequent tests than

students who were sent an email saying that they did better than a certain percentage of the class, even if their rank was the same in both cases.¹⁵

- Commitment contracts can help people follow through on goals they set. A contract starts with identifying a behavior or habit that a person would like to alter, setting reasonable targets to change the behavior, and committing to voluntarily forgo something desirable if the target is not met. For instance, a person may want to get up an hour earlier to read for school before work. The target might be to get up early two days a week. If the target is not met, the person will not go to a friend's party on the weekend.
- Mental contrasting has also been proven to help people to follow through on a difficult goal. This involves having someone state a positive outcome of the desired action, as well as an obstacle to completing it. High school students who used this technique prior to taking the PSATs put in more time studying and scored higher than a control group. For instance, students who stated they wanted to do well on their PSATs but were concerned they didn't have time to study were more likely to find creative solutions to fit in study time and stick to the plan.
- Ensure you have a way to handle students in crisis. Some students may actually be more comfortable divulging personal or sensitive information in written formats than over the phone, so the mental health counselors at East Carolina University may be a valuable resource for staff and faculty who are texting students.



Assign a single point of contact for each prospect at any one time

Institutions deal with processing and handling prospects in many ways. For example, some institutions create a centralized unit to handle all online and flexible learners, but what we are recommending for East Carolina University is to build a structure of prospect handling wherein there is a single point of contact for each prospect at any one time, and divisions have clear handoffs at important enrollment benchmarks. These main points of contact would assess students' needs and refer them to functional units as necessary. Prospects and students will be more likely to engage and follow direction if communication and advice come from single, trusted point of contact.

We are not recommending a centralized unit that exclusively supports online and flexible learners at this time for three reasons:

- Many East Carolina University students may find it more convenient to move between online, campus and blended attendance or take a mix of course formats in order to fill their schedule at convenient times; segmentation of "online students" or "flexible learners" would only cause confusion about lead handling in an environment where ownership and lead handling are already unclear.
- The flexibility that online/adult students need in their enrollment process would benefit all East Carolina University students. For example, consider that many parents of traditional-aged students support the student's enrollment process; these parents would benefit from self-service and online tools that are essential to building a strong online/adult process.
- Due to the limited number of programs and students, it is very unlikely that a central unit would be able to produce a return on investment for East Carolina University for the foreseeable future.

Below is an outline of how this solution could be configured within the current organizational structure, but note that there are multiple ways that East Carolina University could design and deliver this solution. The key for designing the enrollment journey is focusing on the desired outcome and aligning the student-support professional's expertise to where the student is in their journey.

Sample configuration with main points of contacts:

- **Recruiter**
 - **Role:** Generate interest through events, business-to-business relationships, cold calling lists of suspects
 - **Goal:** Generate interest in suspects in order to convert them into qualified prospects that have taken an action to show that they are interested in the institution (raised their hand) by submitting an RFI online, attending an event or starting an application
 - **Division:** Strategic Effectiveness and Engagement
- **Enrollment Navigator**
 - **Role:** Build relationships with prospects that have raised their hand or started an application and support them as they complete required enrollment tasks, know the standard admissions process and have access to relevant data to communicate proactively, refer students to experts/resources where necessary
 - **Goal:** Convert prospects (hand raisers) and in-process students into admits
 - **Division:** Student Development and Success
- **Enrollment Services Advisor**
 - **Role:** Build relationships with prep/waitlist students and support them as they prepare for courses by scheduling courses, advising them through the standard program entrance process, and helping to retain them by understanding their risks and connecting them to support resources: Disability Services, Counseling, Veterans' Military Office
 - **Goal:** Yield admits until they begin courses and retain prep/waitlist admits until they become program admits
 - **Division:** Student Development and Success

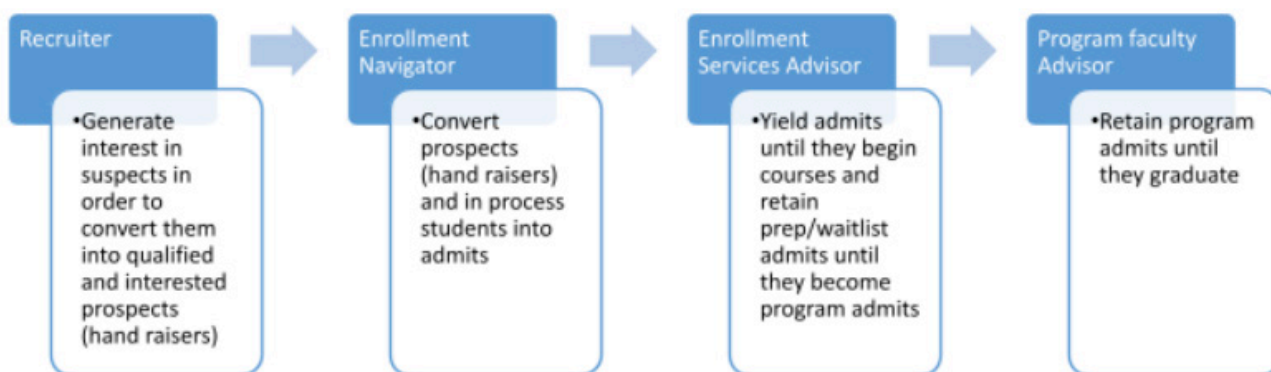
- **Program Faculty Advisor**

- **Role:** Build relationships with program students and support them in their courses; help to retain them by understanding their risks and connecting them to support resources (Disability Services, Counseling, Veteran's Office)
- **Goal:** Retain program admits until they graduate
- **Division:** Academic Affairs

- **Functional roles** are recipients for escalations and referrals and only work with students when they have exceptional cases that require additional support, students ask/want to work with them, communication with them would enhance the student experience or the student outcome (conversion/retention/graduation/career-readiness), or as part of an "awareness of resources" campaign presented to students as a part of their onboarding:

- Financial Aid
- Admissions
- Registrar
- Cashier
- Student-@support resources such as Counselors, Disability Services, Tutoring, Veteran's Military Services, etc.

Sample configuration



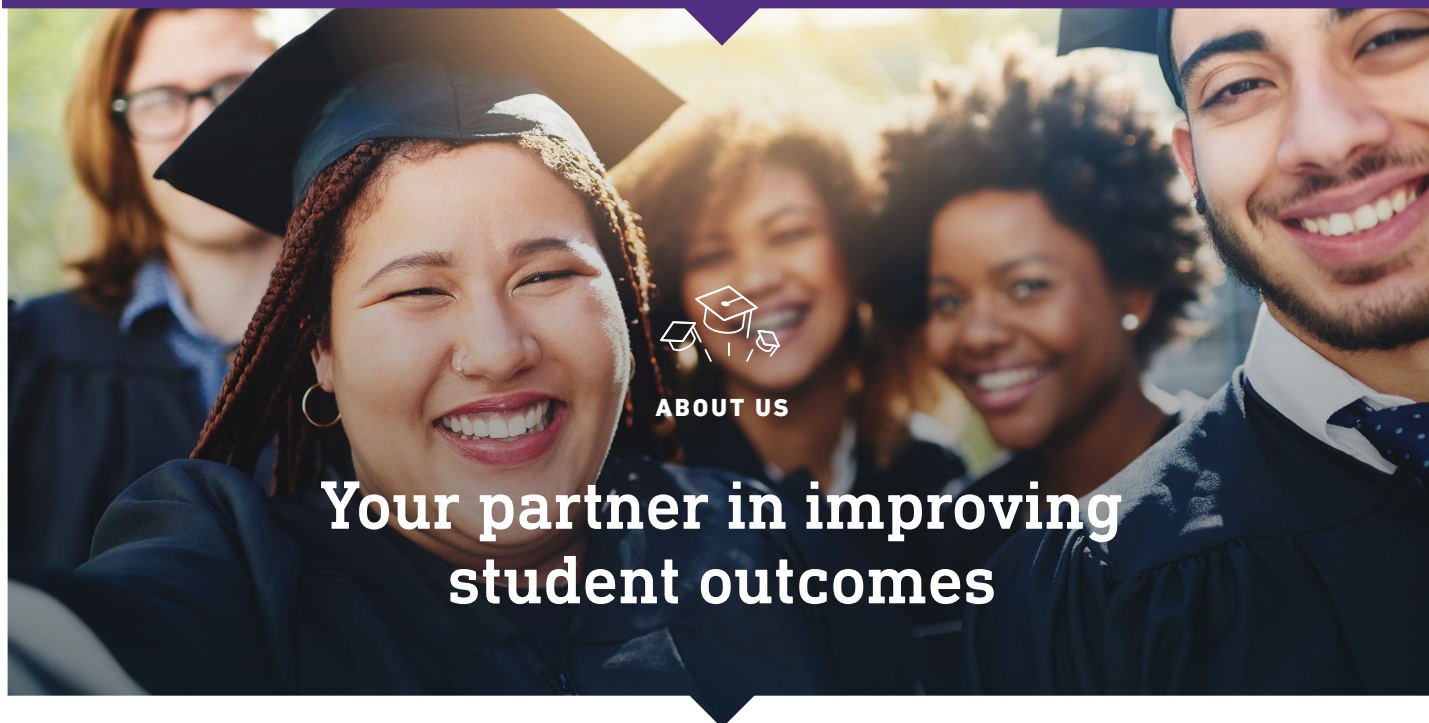
Note that while we recommend that prospects and students have a clear main point of contact and are handed off at enrollment benchmarks, these hand-offs should always keep the prospect or student's needs front and center. The best practices in this area include:

- Role clarity and transparency
 - Each role should share exactly what they do and what others' roles will be. Previewing the journey for students will help them stay on track.
 - This can sound like: *As a recruiter, my job is to help you learn more about East Carolina University and explore our programs to make sure that we are a good fit for you. If you decide to move forward with East Carolina University, you will work with an enrollment navigator who will help you with your admission and enrollment process*
- Continue to refer prospects and students back to their main point of contact
 - Prospects and students should build deep relationships with lots of East Carolina University staff and faculty, but this can mean that students will want to continue to work with just one person such as the recruiter, faculty member or counselor. While this is understandable, part of preparing students for success is helping them develop trust with new divisions and self-advocate for what they need. Also, staying within lanes ensures that students don't fall through the cracks and don't receive misinformation.
 - This can sound like: *I have really appreciated our time connecting today and I am glad that you trust me enough to come to me and share what you need. I encourage you to also share this information with your enrollment services advisor because they will be the person that ensures you get ongoing support with this matter.*

- Some students may need more overlapping support than others
 - A hand-off is not a line in the sand and some students may benefit from several weeks of overlap between divisions. It is okay for a previous main point of contact to still be a part of the student's experience in order to provide support.
 - This can sound like: *It is time for you to start working with an enrollment services advisor, but I am still here in case you need me. I know that you are very nervous about starting classes and though I am confident you will have a great experience working with your advisor, please don't hesitate to reach out if you are struggling.*
- Each hand-off should have a very clear list of criteria that a student meets before they are handed off to the next role
 - Every staff member needs to know what to expect when they start working with a student and this is aided by clarity regarding what the student should know or should have done prior to beginning their work with the next role.
 - An example of a hand-off checklist between the enrollment navigator and enrollment services advisor might include that the student:
 - Is admitted as a prep/waitlist
 - Has decided to attend
 - Has submitted their FAFSA (if using)
 - Has received a copy of the student handbook
 - Knows how to log in to their East Carolina University email



Appendix F: About InsideTrack



We understand the challenges higher education leaders are facing.



Strengthening
TRANSFER AND CAREER
pathways



GROWING ENROLLMENT and
knowing how to stand out in
a higher ed landscape



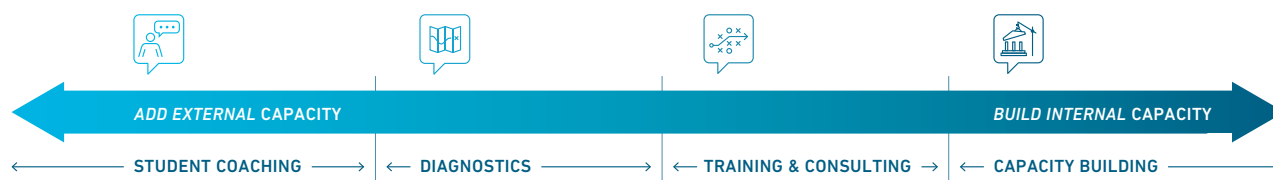
EFFECTIVELY SUPPORTING
an increasingly diverse and
distributed student body



**LAUNCHING AND
SUSTAINING** online
program options

There are multiple ways to tackle the challenges of supporting today's learners.
We'll help you find the right approach.

InsideTrack partners with institutions and other organizations to improve student **enrollment, persistence, completion and career readiness**. With an unwavering focus on enhancing student and institutional outcomes, we work with you and your team to identify program strengths, break through organizational silos, and create a more student-centered experience. As a nonprofit member of the Strada Education Network, we offer partners access to the latest research and data as well as a comprehensive set of solutions that enhance the lifelong success of every learner.



You need a partner who is innovative and experienced — with the insight and proven track record to adapt to any challenge.



EFFECTIVENESS

Proven results for our impact and cost effectiveness with every type of student at every type of institution



INSIGHTS

We bring data and expertise from supporting more than 2 million students and 4,000 programs



EMPOWERMENT

Our “teach to fish” approach drives lasting improvement for your students and your school



FLEXIBILITY

Our network of partnerships provides access to a wealth of resources and solutions



ALIGNMENT

As a nonprofit 501(c)(3) dedicated to student success, we share your mission and values



28%

ENROLLMENT YIELD INCREASE

for online students at
Penn State World Campus



5.5%

INCREASE IN YIELD at Old Dominion University



33% INCREASE IN RETENTION & GRADUATION

for students in technical and vocational
programs in Minnesota's statewide system

“

Having InsideTrack as a strategic
thought partner and source of expertise
and capacity has enabled us to
innovate more quickly, cost-effectively
and with greater impact.

Dr. Renata Engel, Vice Provost for Online Education, Penn State



5 PERCENTAGE

point persistence increase
for traditional-aged
students at Loyola
University New Orleans



77% IMPROVEMENT

IN COMPLETION for first-gen and
low-income students at Ivy Tech
Community College



95% OF GRADS

agreed that career
support helped them
progress toward
their goals



How can we help you improve student outcomes?
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Scan the code to
LEARN MORE >



Appendix G: Change Support Prosci

insidetrack + Prosci



Our Commitment to Supporting Your Goals

Committed to Student and Institutional Success

InsideTrack shares your dedication to enhancing your student experience. We are Prosci® Change Practitioners, committed to incorporating the latest developments in change science into our efforts to improve student and institutional outcomes. Prosci's approach is widely recognized as one of the most effective for driving individual and organizational progress.

For any new initiative to succeed, whether it's a brand-new program or a new approach to your current offerings, the individuals involved may need to change their way of doing things. Getting to the point where everyone is informed and enthusiastic about these changes — and can confidently enact them — is a complex process. According to data from a Prosci report published in 2016, *Best Practices in Change Management*, change initiatives in educational settings benefit from broad support across the institution, including faculty and administrators. The same report cited a number of issues common to the academic area that prompt institutions to launch new initiatives, such as competition in the market, consolidation, budget pressures, changes in government regulations, and shifting student demographics. By integrating Prosci's strategies for preparing for, managing, and reinforcing change, InsideTrack will support the success of your institution's initiatives every step of the way.

Our work with your team will help instill Prosci's five core elements for successfully achieving change, known as the ADKAR model:

Awareness of the need for change

Desire to participate and support the change

Knowledge on how to change

Ability to implement required skills and behaviors

Reinforcement to sustain the change

Drawing on Prosci's methodology, InsideTrack works with your team on understanding the reasons behind change and instilling the knowledge and skills to make that change stick. As a result, new initiatives and programs are seamlessly adopted, and the benefits of these improvements are more quickly passed on to students.

"InsideTrack greatly facilitated our efforts to operationalize continuous improvement. They not only enhanced our ability to provide support and outreach, but also enabled us to execute organizational change at a much more rapid pace."

Saskia Knight, Executive Vice Chancellor for Enrollments and Student Affairs, Brandman University

Our Solutions

InsideTrack can help your institution successfully navigate change through our Training and Consulting and our Coaching programs.



Training and Consulting

InsideTrack's adaptive, project-based Training and Consulting services support institutions in measurably improving student success. They include assessments, training, strategic planning, secret shopping and more. Based in Prosci's methodology for supporting change, our Training and Consulting services ensure that:

- Your program's needs are comprehensively assessed before any new initiatives are launched
- Staff can quickly become proficient in new skills and knowledge involved in your initiative
- Leadership effectively engages all staff in institutional priorities, such as strategic planning
- Any implemented changes are evaluated to ensure they are the best fit for your needs
- A culture of learning and development takes root at your institution



Coaching Programs

InsideTrack Coaching Programs improve enrollment, completion and career readiness, and develop students' abilities. These programs provide valuable insights on the student experience. They are adaptive, technology-enabled and scalable to meet the needs of each institution. Based in Prosci's methodology for supporting change, our Coaching services ensure that:

- Staff have clarity on their respective roles
- InsideTrack and institutional staff can productively collaborate to support students
- Student data can be easily shared between InsideTrack and institutional staff
- New institutional staff learn protocols and practices more quickly
- Institution is supported in using technology to reach students

InsideTrack partners with institutions and organizations to empower and advance all learners. We've supported 2.6 million learners since 2001 and over 250 partners. Our commitment to supporting change can help your new projects and initiatives take hold, delivering a bigger return on investment, better optimizing staff resources, and generating a measurable impact. Leverage our expertise to ensure that your student success initiatives deliver meaningful and lasting results.

Appendix H: Coaching and Advising Comparison

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How Coaching and Advising Complement One Another

Connecting students to resources

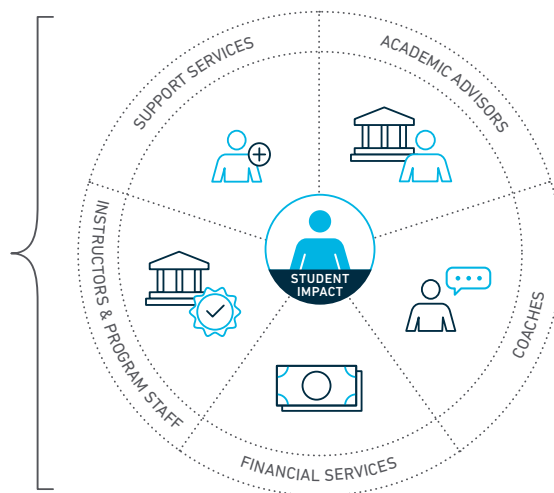
Coaching is individually tailored to each student's needs and is designed to support institutional goals. It's a collaborative process, and we'll partner with key contacts to develop a coaching plan that integrates with — and furthers — your efforts.

Maximize student impact

Coaches will connect students to your existing support services and help them prepare for these interactions. They will reinforce messages from members of your support services teams and follow up with students to ensure accountability.

Coaches and academic advisors will work together, with coaches escalating situations to advising as appropriate.

Students will feel that they have a team supporting them to completion.



Working together toward common goals

Working together with advisors, our coaches will help students:

- Stay on top of important deadlines
- Connect to available financial and academic support services
- Develop strategies to identify and overcome potential obstacles to enrollment

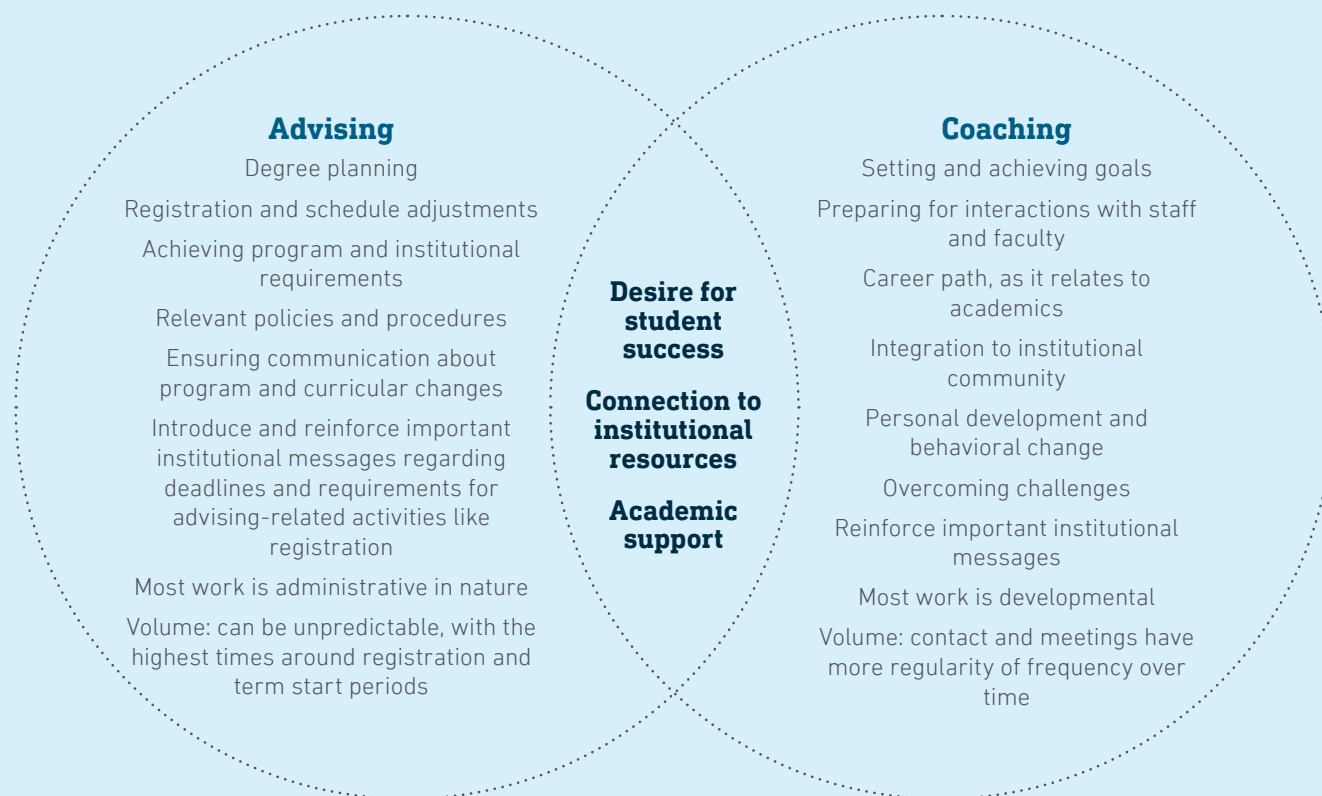
You play an important role

Our work begins with listening to advisors and learning how we can best complement the advising department and processes. Institutional input and guidance will help us understand how the academic advising process works, what typical challenges emerge for students and what opportunities exist to improve the student experience.

Coach Role Clarity and Differentiation of Advisors versus Coaches

Advisor Roles vs. Coach Roles

While coaches and advisors both support student success, their approaches generally differ in both content and goals of outreach and interactions.



A sample scenario of an advising approach as it differs from a coaching approach:

A student contacts us upset because they got a bill they weren't expecting.

WHAT ADVISORS DO	WHAT COACHES DO
The advisor will explain basic information about fees and will inquire about the student's funding sources to identify involved departments and refer the student to the Office of Financial Aid, Veteran's Benefits and/or Bursar's Office as applicable.	The coach will help the student articulate their concern, create questions for each department involved to understand the bill and explore options if/as needed, and build confidence. The coach will then have the student plan a time and channel for outreach, with the expectation that the student will follow up with the coach during their next meeting. If the student has run into any difficulty, or still isn't fully understanding important details, the coach will help the student plan for another outreach or will escalate their concerns to a predetermined contact at the institution who can coordinate with others to resolve the student's questions or concerns.

Appendix I: Retention Coaching Programs

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Retention Coaching Programs

Nurture student engagement. Increase success.

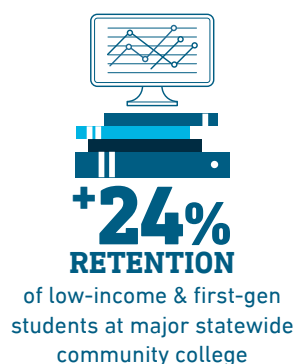
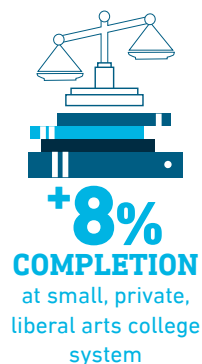
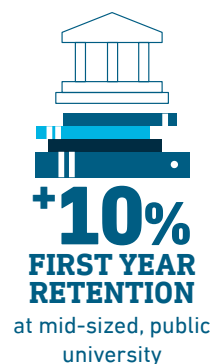
You are giving students the opportunity for a great education. *Are you also preparing them to get the most out of it?* Many students need support defining goals, learning to balance competing commitments and developing the mindset required to take full advantage of the opportunities available to them in college and beyond.

InsideTrack Coaching Programs improve completion and career readiness, and develop students' abilities. These programs provide valuable insights on the student experience. They are adaptive, technology-enabled and scalable to meet the needs of your institution.

InsideTrack coaching enhances — not replaces — your existing services. We work with students one-on-one to help them develop the knowledge, skills and attitudes that lead to success. Our coaches empower students to better understand themselves, their goals and the resources available to assist them. As a result, students engage more actively and meaningfully with the services and opportunities your institution offers.

Tangible results

InsideTrack Coaching increases retention and completion. Our coaching not only impacts students directly, but also empowers institutional leaders to evaluate the effectiveness of current policies and programs. Coupled with the meaningful engagement from coach-student interactions, these insights drive more effective decision-making and stronger return on investment. The results are powerful. *For more success stories, visit www.insidetrack.org/impact-report/*



How it works

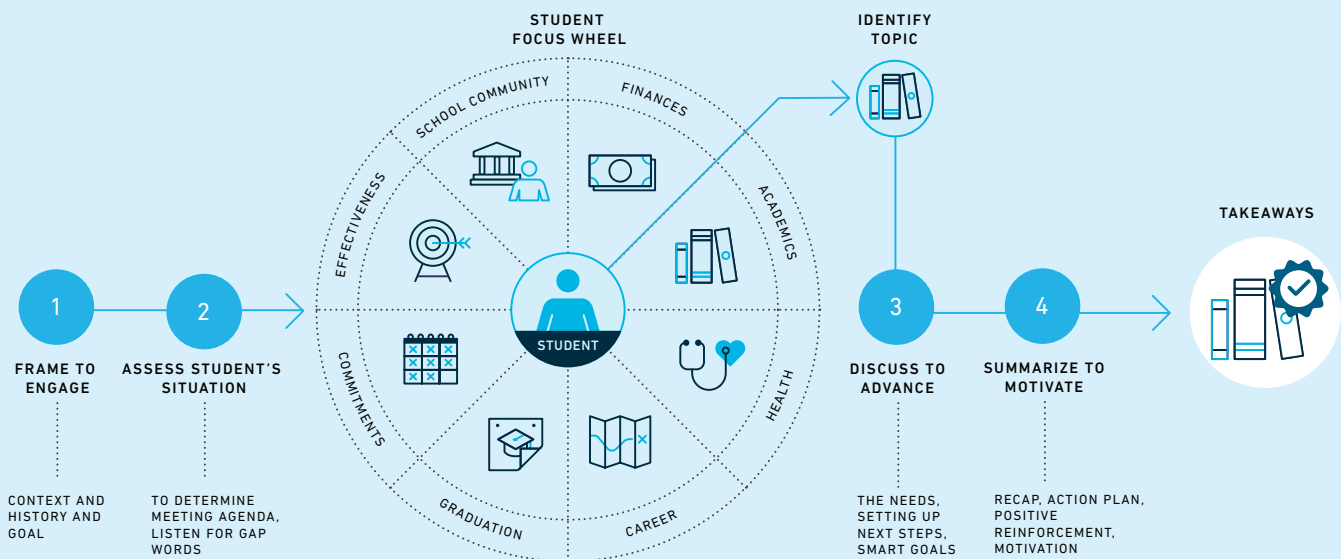
InsideTrack coaches are highly trained professionals dedicated to helping students build crucial skills, self-advocate, and take responsibility for their own success.

The InsideTrack weCoach platform is adaptive to support coaches in engaging and building strong personal connections with students. Coaches guide students through an individualized process of self-discovery and personal development using phone and video meetings, web and mobile apps, email, text messaging and interactive content.



Through structured and ad-hoc sessions, coaches empower students to:

- Clarify where they want to go after graduation
- Connect their goals to what they need to accomplish each week
- Organize their priorities and get work done
- Identify potential obstacles
- Stay motivated to persist through challenges
- Reaffirm their commitment to graduation and the institution



"InsideTrack's multifaceted approach to student support has already helped us increase persistence by double digits."

Suzanne Harbin, director of advancement, Wallace State Community College

Appendix J: Crisis Support Services



Supporting enrolled and prospective students in times of crisis

For some college students, daily concerns are bigger than school, running the gamut from food and housing insecurity, financial issues, safety concerns or violence to emotional distress such as grief, anxiety and thoughts of suicide. A crisis situation is any situation where the student feels unusually stressed or overwhelmed and lacks the personal support they need. That's where the InsideTrack's Crisis Support Services (CSS) team comes in.

Here's how it works

InsideTrack Coaches talk, text and email with thousands of students every day — from all types of backgrounds, in all types of higher ed settings. They dig deep to help each student succeed. And when they come across a student struggling with a potentially serious or crisis situation, they can directly connect that student with a member of the CSS team.

Once connected, members of the CSS team follow a specially developed crisis intervention model that uses compassionate and holistic assessment to listen to, validate and explore root issues with the student. These Crisis Support Specialists are trained to ask trauma-informed questions to get the student to open up and get to the heart of the problem — asking things like “what is most important to you right now,” “how is this affecting you” and “what would be the most helpful thing for us to focus on today?” Understanding the right way to work with students in crisis can make a world of difference.



Over one-third of first-year college students struggle with mental illness.

American Psychological Association

The role of Crisis Support Services

Once the CSS Specialist joins the conversation, they work to build a relationship with the student and gain their trust. Here's how the Crisis Student Services model works:



- Identify the student's most immediate needs and any safety risks
- Work collaboratively to explore support options
- Provide referrals to available local resources, including licensed professionals, as needed
- Collaborate with campus administrators and local authorities to mitigate safety risks, as necessary
- Create a plan of action for moving forward
- Serve as a student advocate throughout the duration of the crisis
- Follow up to make sure the student is safe, supported and able to access available resources

The benefits of CSS support for the institution

Having coordinated Crisis Support Services available also helps the college or university.

- Provides immediate and direct support for students experiencing a crisis situation
- Grants peace of mind to staff members who are not properly trained to address crisis situation topics
- Supports fulfillment of legal and ethical responsibilities related to crisis situations
- Addresses immediate student concerns, improving their ability to focus on their educational goals
- Protects the ongoing coach role and the student/coach relationship
- Drives use of campus resources, such as the counseling center, student health and multicultural center
- Connects students to community resources and intervention services to address their needs
- Helps with compassion fatigue among staff members

Extending CSS for Capacity Building



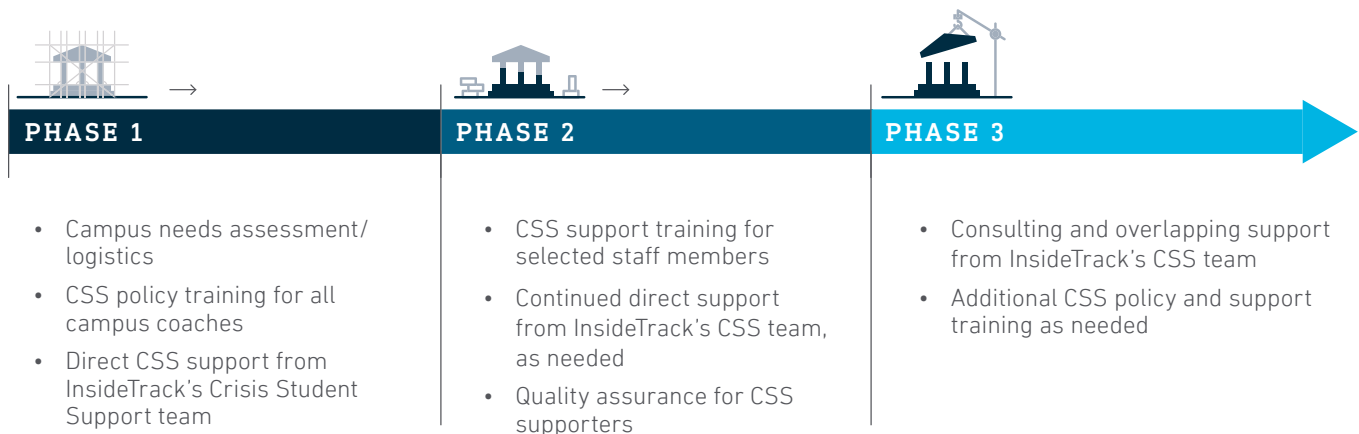
Standard CSS Service

InsideTrack's Crisis Student Services provides direct support to all InsideTrack Coaches and the students they work with.



CSS for Capacity Building

InsideTrack's Crisis Support Services trains campus personnel on how to assess for crisis situations and provide ongoing support for both students and staff, as well as provides direct coaching support.



InsideTrack partners with institutions and organizations to empower and advance all learners. We've supported 2.6 million learners since 2001 and over 250 partners.

Appendix K: Re-Enrollment Coaching

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Re-Enrollment & Strong Start Coaching Programs

Re-engage, re-enroll, and prepare former students to finish strong

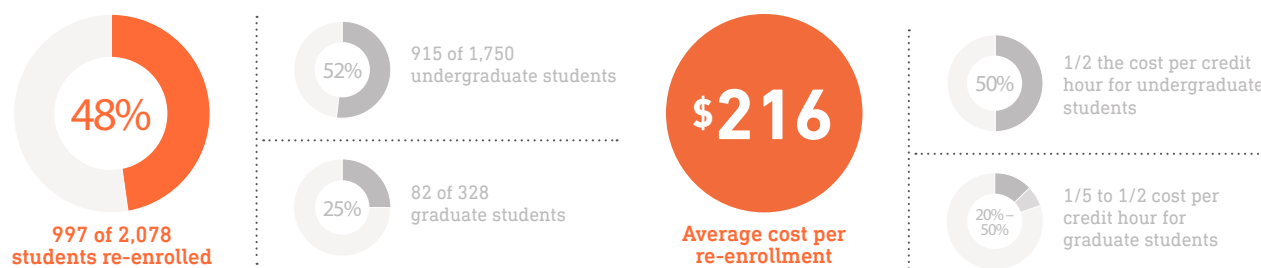
Too often, life gets in the way of students fulfilling their goals. Challenges such as a personal illness, family commitments or changes in employment can lead students to leave school prematurely. InsideTrack Re-Enrollment & Strong Start Coaching brings students back to your institution prepared for long-term success. Our coaches re-engage students with the value of completing their education, re-connect them to your institution and help them prepare to effectively balance work, family, financial and academic obligations. Boost enrollment and completion rates. Leverage your prior investments in recruiting. Ensure that all of students have the opportunity to finish what they started.

SAMPLE RE-ENROLLMENT & STRONG START COACHING ENGAGEMENT



Tangible results

Improve return rates, even over several terms, and improve retention rates for returning students.



How it works

InsideTrack coaches re-engage students who have been away from your institution for at least one academic term and help them develop a plan to complete their education. This process also generates valuable insights on students' enrollment decisions and prior experiences with your institution.

Specifically, coaches work with students to:

- Re-connect to their purpose for pursuing a credential
- Recognize the value of your institution
- Define and execute a plan for re-enrolling in their desired program
- Develop the skills needed to effectively balance work, family, financial and academic obligations

By leveraging our noncognitive coaching methodology, InsideTrack Re-Enrollment and Re-Entry Coaching helps students develop the knowledge, skills, attitudes and beliefs they need to succeed in college and beyond. The goal is to help each student develop and execute a personalized plan for returning to school and completing their studies ready for career success.

Using InsideTrack's uCoach® Platform, coaching engages students through a mix of multichannel communication and digital guides. Coaches nudge students along with timely messages reminding them of important deadlines, opportunities and productive habits while directing them to informative and educational materials such as short videos and interactive resources. In addition, coaches can interact with students who have questions or seek additional engagement via one-on-one meetings, email and text messaging.



"InsideTrack gave me the strength and self-confidence I needed to go back to school later in life. I'm a mom, grandma, choir singer and Sunday school teacher — and a straight-A student. Completing my BA will help me achieve my dream of one day founding my own charter elementary school."

— Student





Appendix L: Student Journey Mapping Overview

Seeing your school through the eyes of a student

Get your student-facing functions on the same page

From initial contact through graduation day (and beyond), Student Journey Mapping provides a visual representation of a process that can be difficult to track — taking you on the exact journey your students experience and pinpointing changes needed. All of those insights add up to a fresh perspective on any roadblocks or barriers your students may face. You'll finish the mapping process with tangible actions you can use to create better outcomes, a deeper understanding of the student-facing functions at your institution, and new tools for better cross-functional collaboration.

Tips to make Student Journey Mapping a success

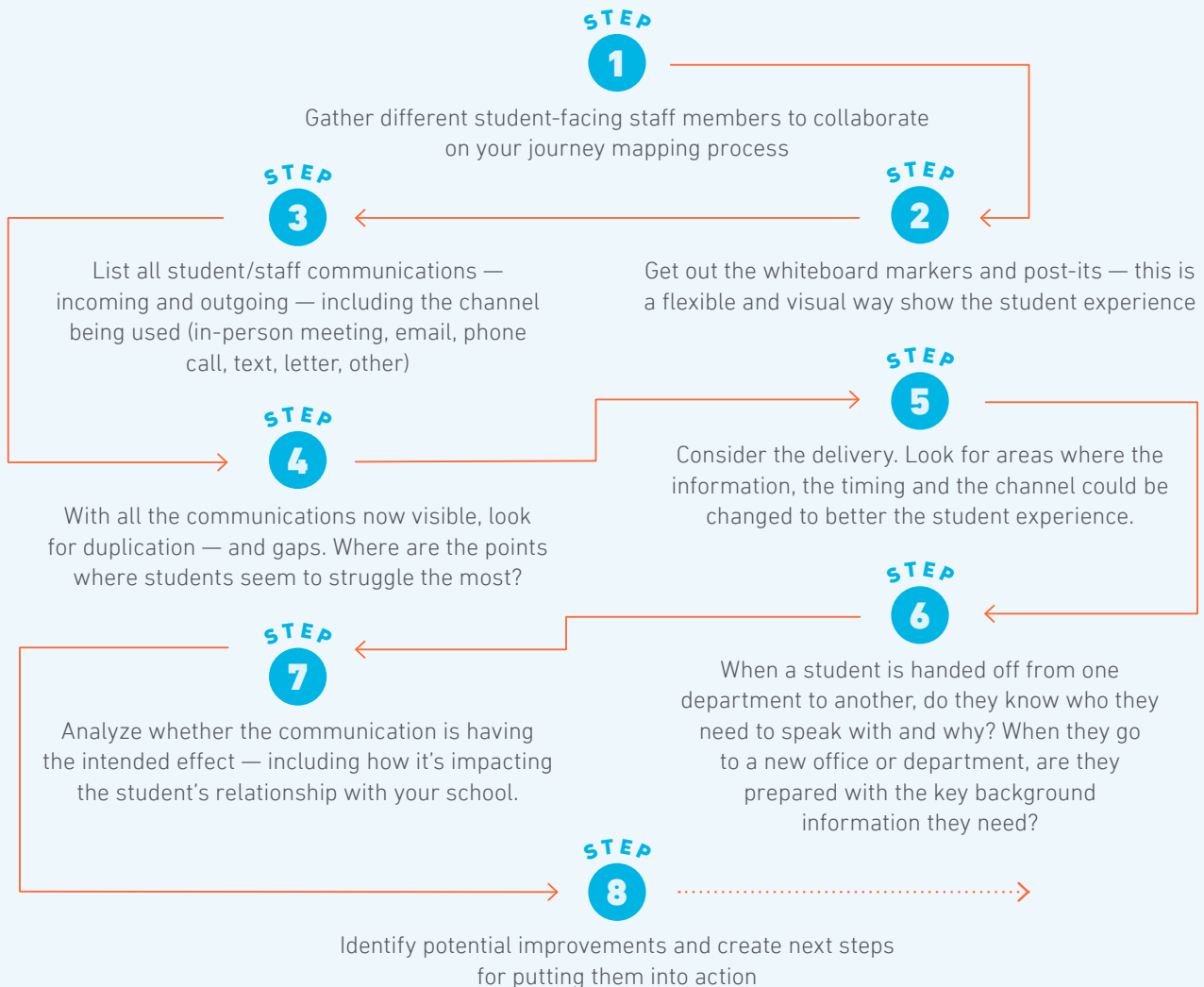
 PLAN YOUR ITINERARY	 DETERMINE YOUR DESTINATION
<p>Take as much time as you need: A lot can be done in a few hours — even more in an all-day session.</p> <p>Face time: There's no substitute for meeting together in-person to create a process together.</p>	<p>Successful journey mapping hinges on knowing what your map will cover. Sample student journeys that can benefit from mapping include: Acceptance to enrollment and Term 1 start to Term 2 registration.</p>
 SEE THROUGH THE EYES OF YOUR STUDENTS	 ENJOY INSTITUTIONAL BENEFITS
<p>To create a better student journey, you need to first understand the experience from the student's point of view: If I were taking an online course for the first time, what would I need to know? What is the complaint from students I hear most often?</p>	<p>What will you get out of your student journey mapping process? Benefits include: New insight into what the student needs to be successful and the opportunity to improve a process that students struggle with.</p>



How can we help you improve student outcomes? hello@insidetrack.org • insidetrack.org



Sample Student Journey Mapping session



How can we help you improve student outcomes? hello@insidetrack.org • insidetrack.org

Appendix M: Educational Theory

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Our Educational Theory for Student Success

Solutions for today's students

Our understanding of how to support students has changed substantially in the past 20 years. In an article published in the Stanford Social Innovation Review entitled “Rethinking How Students Succeed,” researchers highlight that shift in understanding:

Twenty years ago, conventional wisdom held that cognitive ability displayed by mastery of core academic subjects paved the way to success in school, career and life. Today, we know better.

Success comes when cognitive skills work in tandem with so-called soft skills like self-control, persistence, social awareness, relationship development and self-awareness. Practitioners and researchers typically frame their discussions of these characteristics around either social and emotional skills, or academic attitudes and behaviors. Each charts a separate path of inquiry and classroom practice. Yet they share a common destination: developing students whose mastery of noncognitive skills, strategies, attitudes, mindsets and behaviors enhances their academic and life success.

And according to an article called “Academic Tenacity” by Carol Dweck, Greg Walton and Geoffrey Cohen, this approach to supporting students is especially important for those from underserved communities. Many institutions have yet to incorporate noncognitive skill development into their student support model. The role of a traditional advisor, for example, is not to develop students but to help reduce legal, financial and academic risk for both the student and the university by:

- Informing students of important policies and deadlines
- Helping students understand their options and the consequences of their decisions
- Helping students understand academic policies such as degree audits, course selection and how to stay on track academically so they can graduate

While these activities are important, they do not fully encompass the type of support that many of today's students need. Additionally, many advising functions can now be supplemented by technology, reducing the number of manual tasks advisors traditionally performed, such as degree audits. The ability to work with students in depth on noncognitive development is the primary differentiator between coaching and advising. The goal of the coaching relationship must be to increase students' ability to effectively take advantage of the available resources and opportunities both within the college and beyond.

Engagement and issue resolution results for adult and online students

+25%
INCREASE
in Net Promoter Score
(NPS) at a major for-profit
university

+20%
**COACHED
STUDENTS**
reported that they were
more committed to
graduating

+4.4%
MORE LIKELY
to complete credits than
uncoached students

+95%
SATISFACTION
of graduate students with
career coaching at an Ivy
League university

How we incorporate theory into real-world solutions

We apply these learnings by partnering with institutions to provide nonacademic support to students. InsideTrack supports university staff through a comprehensive and customizable combination of coaching, analytics, technology and consulting. Our partners improve student enrollment, persistence, career readiness and develop more agile and effective approaches to ensure consistency and quality in all their student-facing functions.

InsideTrack has created a coaching model that can be used to help students develop the fundamental knowledge, skills and beliefs (KSBs) they need for success. The model is relevant and effective for working with students who are from traditionally underserved communities. The methodology doesn't categorize students by their KSBs but assesses and provides tailored support to help each individual achieve a personal vision of a life made better with a college degree.

Early support equals maximum impact

Engaging with students at the right time and providing more care to students who are less prepared for success are critical components of high-quality, impactful student support. Every student is unique, but there are indicators of who will need support and when he/she will need it.

The most critical period for additional student support is when students are new to the university, especially from registration through their first three to six months of classes. This period is critical because students receive an overwhelming amount of information and need support in understanding and also — digesting it. They often have feelings of anxiety and self-doubt; they might need help to connect with services to improve their computer skills; and/or they may struggle with thinking they don't belong in school. InsideTrack data shows that connecting students with student support professionals that utilize coaching skills earlier has a positive impact on retention.

Our results

For more than a decade, InsideTrack conducted comparison studies between statistically balanced coached and control groups to find positive outcomes in retention, engagement, school satisfaction and graduation. The benefits of coaching have been found to carry into other areas of students' lives, increasing their feelings of effectiveness, allowing them to better manage their commitments and decreasing stress.

In a landmark paper published in AERA's Educational Evaluation and Policy Analysis, "The Effects of Student Coaching: An Evaluation of a Randomized Experiment in Student Advising," Eric Bettinger, associate professor of economics at the Stanford Graduate School of Business, led an independent review of controlled studies on the effects of InsideTrack coaching. Bettinger's report validated findings that InsideTrack coaching consistently improves retention and graduation across demographic bands by as much as 15 percent. The U.S. Department of Education's What Works Clearinghouse then reviewed Bettinger's analysis of InsideTrack's methodology, citing that it included "well-executed randomized controlled trials with low attrition."

Persistence and completion results for adult and online students

+13%
**GRADUATION
RATE**
based off of 10,000
students at eight
institutions

+14%
**RETURNING
STUDENTS**
persisted into the next
term

+90%
RETENTION RATE
was maintained as
enrollment grew from
1,500 to 10,000 students at
a public online university

+21%
INCREASE
in first-year retention of
African American and
Latino online students at a
major for-profit university



Appendix N: Endnotes

- 1 <https://starfish.ecu.edu/>
- 2 <https://ecucares.ecu.edu/>
- 3 <https://news.ecu.edu/2021/04/06/ecu-named-first-gen-forward-institution-for-its-commitment-to-the-advancement-success-of-first-generation-students/>
- 4 Putnam, Robert D. (2001), *Bowling Alone: The Collapse and Revival of American Community*. New York: Simon & Schuster
- 5 <https://myapps.northcarolina.edu/conferences/military-education-fair/>
- 6 <https://myapps.northcarolina.edu/conferences/2022-behavioral-health-conference/>
- 7 <https://www.washingtonpost.com/business/2020/09/16/college-enrollment-down/>
- 8 <https://www.nytimes.com/2021/12/22/us/covid-college-mental-health-suicide.html>
- 9 Prosci. ADKAR change management model. 2017.
<https://www.prosci.com/methodology/adkar>
- 10 Thaler, Richard H. and Cass R. Sunstein. *Nudge: Improving Decisions About Health, Wealth, and Happiness*. Penguin Books. 2009.
- 11 Commit! Text Messaging Bridges “Summer Melt,” Increases College Enrollment. April 20, 2016.
<https://commitpartnership.org/blog/text-messaging-bridges-summer-melt-increases-college-enrollment>
- 12 Castleman, Benjamin. “Supporting Low-Income Students: Strategies for Retention and Success.” *The Evollution*. July 29, 2014.
<http://evollution.com/opinions/audio-supporting-low-income-students-strategies-retention-success/>
- 13 Berdik, Chris. “Texting Doesn’t Have to Be a Distraction.” *Slate*. September 16, 2015.
<https://slate.com/technology/2015/09/how-text-messages-can-keep-students-on-track.html>
- 14 Karlan, Dean, Margaret McConnell, Sendhil Mullainathan, and Jonathan Zinman. “Getting to the Top of Mind: How Reminders Increase Saving.” *National Bureau of Economic Research*. July 2010.
<http://www.nber.org/papers/w16205.pdf>
- 15 Berdik, Chris. “Texting Doesn’t Have to Be a Distraction.” *Slate*. September 16, 2015.
<https://slate.com/technology/2015/09/how-text-messages-can-keep-students-on-track.html>