Appendix K

Ruffalo Noel Levitz Report 6 July 2013

Noel-Levitz

July 5, 2013

Dr. James Limbaugh
Chancellor
Montana State University-Northern
P.O. Box 7751
Havre, MT 59501-7751

Dear Jim:

Attached is the report for my sixth and final visit to Montana State University-Northern (MSUN). This is a much shorter report than prior ones because I want to draw attention to the must do, high-priority tasks that must be accomplished in the next four to six weeks to ensure the University can achieve its retention goal for the 2013 first-year cohort. Hence, I hope Tracey and team coordinators will use this as a final "checklist" for launching the new initiatives in a timely and appropriate fashion.

While my visit was productive, I was surprised by the lack of communication within, as well as between, some key teams and the lack of follow-up and oversight to make certain that major, critical tasks were being accomplished in a consistently effective manner. These are areas that must be immediately addressed and I encourage you and Tracey to stress the importance of meeting key deadlines, appropriate oversight, and accountability on everyone's part.

As I suggested in the report, I'm delighted to hold conference calls with team coordinators to help them with finalizing their action plans between now and early August. However, I have a robust travel schedule between now and then. Therefore, I will need a few days lead time to schedule the call.

I hope this report is helpful to you and members of the Student Success Improvement Team (SSIT). If you desire, I welcome an opportunity to discuss it with you at your convenience.

Finally, I want to thank you, Tracey, and others for the opportunity to serve MSUN. As I have mentioned on numerous occasions, I have never worked with an institution that possesses so much potential for substantially improving student success. To this end, please count on me for any future guidance you deem appropriate.

Sincerely,

Charles C. Schroeder
Senior Associate Consultant

c. Ms. Tracey Jette, director of student success
Dr. Rosalyn Templeton, provost
Ms. Stephanie Geyer, associate vice president, Noel-Levitz
Mr. Tim Culver, vice president, Noel-Levitz

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Major Must Do Recommendations for Each Action Team

All coordinators are encouraged to read and discuss the "must do" recommendations in my prior report (visit five) and use those in concert with the ones outlined below as a final checklist for high-priority tasks that must be accomplished in the next six weeks. I cannot stress enough the importance of these tasks as foundational, not only to the immediate implementation of key action plans, but to their long-term vitality as well.

IMPORTANT: It is also imperative that three teams – learning communities, early-alert, and enhanced advising – meet weekly to substantially improve communication and coordination. Consider this a **TOP PRIORITY!**

Early-Alert Team

Since the early-alert is, without a doubt, the most promising strategy for substantially improving retention, I encourage team members to immediately focus on completing the following tasks:

- **Ensure that students with low high school grade point averages and low or no ACT scores receive calibrated schedules during pre-registration sessions** (IMPORTANT: This is a priority recommendation for the Enhanced Advising Team as well.)
  - Defer Math 095 until the second or third term. Provide a **weekly report** by 4:00 p.m. **every Thursday** to Tracey and Norton on the number of students not registered in 095. Ask Norton to confirm that appropriate sections of 095 are provided second term for those students that did not take it first term.
  - Enroll all of these students in the Study Skills course.
  - Unless absolutely necessary, do not enroll first-term freshmen in online classes.
  - Make sure that none of these students take a lab science course during the first term.
  - It is important that each of the approximately 100 students with these characteristics have a faculty mentor for at least the fall term and hopefully, spring term as well.
- **Immediately schedule a campus demonstration of the new *Maxient* early-alert software**. Based upon the review, determine the feasibility of using it in the fall primarily in high-risk courses taken by first-year students. (IMPORTANT: If Maxient is not available for fall, by August 10 create an "intermediate" electronic early-alert system using e-mail, Blackboard, or some other venue.)
- **Immediately have Matt generate and distribute the list of high-risk courses to all members of this team and the Enhanced Advising Team.**
- **By mid-July, determine strategies to not only introduce early-alert to faculty and staff at the August orientation, but also to orient and train those faculty selected for the pilot program in how to use it prior to the start of fall term.**
- **Complete the action plan for the recruit-back component of early alert.** Although great strides have been made in understanding the elements of this component, the team

has not fully implemented it. I suggest completing the following steps by July 10 at the latest:

- Determine the composition of the permanent, ongoing Recruit-Back Team (i.e., Stuart, Tracey, Cindy, etc.).
- Clearly specify key indicators (i.e., failure to register for the next semester, incomplete FAFASA, etc.) that will trigger specific responses in a timely manner.
- Incorporate, on a rolling basis very high-risk students that Cindy continues to identify through her financial aid counseling process.
- Determine primary KPIs for evaluating the success of the initiative.

- **Hire/appoint an early-alert coordinator**. I recommend that an individual be appointed that cannot only coordinate the program, but academic/enrichment and potentially advising as well. This will require a new admistrative and reporting structure.
- **Complete the planning for substantially expanding and enhancing tutoring and other forms of academic enrichment.** I highly recommend that the team create a small subgroup to quickly complete the following tasks:
  - Immediately determine the number of tutors needed for the fall to provide academic support in the most critical high-risk courses.
  - Ask faculty to nominate students that they feel are most qualified.
  - Try to select the tutors prior to the start of fall term, or if this is not feasible, within the first two weeks at the latest.
  - Create a pre-school orientation and training program, as well as scheduling calendars for the two tutoring areas – Cowan and the Library.
  - Consider appointing a lead tutor that can provide oversight for other tutors in the Academic Success Center. This individual would be responsible for such basic administrative functions as scheduling, payroll, day-to-day oversight, etc.
  - Formalize understandings of the relationship between this program and tutoring in the TRIO and other programs to insure effective coordination and to reduce potential confusion.
  - IMPORTANT: Focus tutoring and academic enrichment primarily on first- and second-year students in the “highest” 60 high-risk courses (i.e., Math 095; Writing, etc.)
- **Develop communication, promotion, and training strategies.** Since engagement of faculty, particularly those that teach first-year students, is absolutely critical to the success of early-alert, the team should quickly develop strategies to communicate the benefits and facilitate buy-in of faculty and chairs. To accomplish this objective, I suggest the following:

- Develop an early-alert FAQ that includes the purpose of the program, referral criteria, benefits to students and faculty, etc.
- Create a strategy for orienting and training faculty on how to use the online referral system once it is implemented.
- Determine methods for assessing participation, peak times, performance improvement, etc. and how to share this information with faculty and chairs.
- Explore creating early-alert faculty coordinators in the two schools that simply serve as "liaisons" for their schools.
- Expect faculty that teach first-term freshmen to give graded assignments the first three weeks of the term, as well as mid-term grades so that students understand the difference between high school and college-level academic expectations.
- Build expectations for early identification of students at risk of failure and delineate key decision points each semester, such as deadlines for dropping classes with a passing grade and communicate these to faculty in a timely manner.

Enhanced Advising Team

This team should focus immediately on the following priorities:

- **Ensure that students with low high school grade point averages and low or no ACT scores receive calibrated schedules during pre-registration sessions** (IMPORTANT: This is a priority recommendation for the Early-Alert Team as well).
  - Defer Math 095 until the second or third term. Provide a **weekly report** by 4:00 p.m. **every Thursday** to Tracey and Norton on the number of students not registered in 095. Ask Norton to confirm that appropriate sections of 095 are provided second term for those students that did not take it first term.
  - Enroll all of these students in the Study Skills course.
  - Unless absolutely necessary, do not enroll first-term freshmen in online classes.
  - Make sure that none of these students take a lab science course during the first term.
  - It is important that each of the approximately 100 students with these characteristics have a faculty mentor for at least the fall term and hopefully, spring term as well.
- **Front load the best advisors to serve as mentors for a small group of high-risk, first-year students.** Quickly **confirm** the advisors in the two schools that have a reputation for being student advocates and highly-effective advisors. Invite them to mentor the approximately 40 high-risk incoming freshmen students throughout their first term and hopefully the spring term as well. IMPORTANT: In addition to having them meet their advisees during orientation, ask them to e-mail their students now to get acquainted and then meet at least twice during the first six weeks of fall term to monitor transition issues and any issues that are affecting students' success.

- **If feasible, revise and disseminate the advising handbook during fall faculty and staff orientation in August.** Determine the sections that are most important for effective advising. IMPORTANT: Work with Rosalyn, Christine, and Greg to determine the most effective strategies for introducing the new handbook to their faculty. However, if there is not sufficient time and/or resources to introduce a more comprehensive advising approach in a highly effective fashion by August, I highly recommend that this be deferred to the second term or the fall term of 2014.
- **Link and align first-year advising with learning community courses.** The most promising model for rapidly improving student success is to select highly-effective advisors that will be teaching core learning community (LC) classes and have them advise students in their learning communities. Christine and Greg.
- **Flow chart the steps Tracey outlined in her "Process for Incoming Students" document.** Be sure to make explicit key steps in the new process in terms of roles, responsibilities, and timelines. In addition, include a section that addresses faculty selection, orientation, training, and evaluation.
- **Delineate student and advisor expectations of effective advising**. Review the short document, how you and your faculty advisor should work together, included in the Appendix of my visit three report, as well as the one in the MSUN Faculty Advising Handbook. This details a set of reasonable expectations on the part of advisors and advisees.
- **Quickly determine the appropriate role of first-year advisors in early-alert.** Work with the Early-Alert Team to determine the most important roles and responsibilities of first-year advisors in relation to the recruit-back and early-alert programs.

Learning Communities Team

The development and implementation of the learning community program is at a crossroads. Key steps must be taken now in the foundation stage to make sure that subsequent tasks are built on a solid foundation. Therefore, the following are non-negotiable, must do tasks to complete immediately!

- **Immediately coordinate efforts with Jenn, Ligia, and Christine among others the implementation of critical steps such as course selection/schedule development, LC placement, and residence hall floor assignments.** Must do, high-stakes tasks include:
  - Target the most appropriate students for LC participation. Don't forget Native Americans and freshmen commuters.
  - Tell students during pre-registration that they are being placed in an LC.
  - Share the new description of LC benefits (*Ten Benefits of Joining a Learning Community* developed by Christine) during pre-registration with students and their parents.

  - IMPORTANT: By 4:00 p.m. every Thursday send a complete list of students for that week that have been placed in LCs to Christine and Tracey. Have Jenn also keep an accurate, cumulative record of total LC placement.
  - Within a week of registration, be sure that the new LC students that will live in a residence hall are placed in a room on the appropriate wing. IMPORTANT: Every Thursday at 3:00 p.m., have the person making room assignments send to Tracey and Christine a list of room assignments.
  - VERY IMPORTANT: Have Christine verify the course schedule accuracy and appropriate placement of each LC student within 10 days of original selection/placement. Make adjustments as needed on a timely basis.
- **Select an upper-class student to serve as the linking agent between the residence hall LCs and the faculty teaching LC courses.** This person can be a very valuable asset in sponsoring and integrating co-curricular, residential experiences that complement classroom experiences. Considering offering free room and possibly board as compensation.
- **Insure broad-based interaction between LC faculty and their students outside of class.** Provide all LC coordinators with a $200 stipend, as well as one lunch meal a week to increase out-of-class interactions with their students. The $200 could be used to cover expenses for faculty that want to provide an occasional meal at their homes for their LC students.
- **Academic and social expectations**. Determine academic and social expectations (i.e., effort, peer support, group studying, etc.) that are most appropriate for students participating in learning communities? How should these expectations be communicated and by whom? Are there consistent messages that should be common to all communities?
- **Introducing LCs to faculty and staff during August orientation.** Quickly determine the best strategies for introducing faculty and staff to the educational value of LCs during their summer orientation. Consider using the "Ten Benefits…." Document recently created by Christine.
- **LC faculty orientation/planning**. Consider creating a student engagement/learning communities orientation/planning session for faculty teaching the selected LC courses. The focus would be LC purposes, outcomes, benefits, and pedagogical opportunities in and outside the classroom (i.e., study groups, team projects, and presentations, etc.).

Service Excellence Team

This team has made excellent progress in crafting an ambitious yet achievable action plan. The following recommendations should enable the team to successfully implement key strategies for the fall:

- **Determine the most appropriate process for engaging staff in conversations about improving the quality of service in key institutional areas.** As highlighted in my last visit report, conduct a few staff focus groups to determine from the "bottom up" staff service excellence needs and priorities. Simultaneously, work from the "top down" by

encouraging the chancellor to stress the central role of service excellence in improving student, as well as institutional success.

- **Complete strategies to reduce and eventually eliminate the campus runaround**. Team members have generated important information from key student service areas that can be compiled into a FAQ that enables everyone to be more informed about critical functions in these offices so that they can respond to student queries without having to pass the student off to other units. Complete this task by the July 8 target date.
- **Create a separate action plan for improving the social and academic experiences of students living in family housing.** Since Denise is coordinating with a variety of other stakeholders, have her develop an action plan with all key implementation steps outlined in priority order along with timelines and individuals responsible. This should be done by July 8 or 12 at the latest.
- **Complete efforts to explore potential service philosophy statements, as well as a MSUN Service Pledge**. While the team has developed a one sentence statement, I suggest creating at least two or three additional ones that can be shared widely with other staff to enlist their input and create the most viable statement. In addition, make sure the statement is an inspiring and relevant call to action that clearly articulates MSUN's service commitment not only to students, but other internal and external stakeholders as well.
- **Continue to collaborate with the Financial Challenges Team to improve service quality**. Jointly identify what members of both teams consider to be the most serious dysfunctional processes, practices, policies, etc. For example, almost everyone agrees that releasing the course schedule one week before registration has a profound, negative impact on students, advisors, and some faculty.
- **Before the fall term, create assessment and evaluation strategies to determine your success**. As highlighted in my prior report, there are a number of potential indicators the team can use to determine its relative success. Some of the major indicators that could be considered KPIs are listed below:
  - Reducing gap scores on key Student Satisfaction Inventory™ (SSI) items.
  - Substantially reducing the number of redundant steps in various processes.
  - Translating key elements of a service pledge, such as "fast" into measurable outcomes (i.e., answering every call in less than two rings).
  - Reducing the number of students that are not completing their FAFSA on time.
  - Reducing the number of students that leave without officially withdrawing.
  - Streamlining the registration process and thereby reducing the amount of rework.
  - Improving the timeliness of staff responses to students and one another.
- **Create a separate action team to showcase your service excellence program at fall orientation.** The team's action plan lists a number of service excellence activities and

experience members want to sponsor during fall orientation. Since this requires planning, I recommend a separate action team be convened to accomplish these tasks.

Financial Challenges Team

This team has accomplished some important tasks and it is posed to have major strategies implemented by the start of fall term. The following represent the most important, high-impact activities the team should complete by that time. PLEASE NOTE: Some of these tasks overlap with the Early-Alert Team and Service Excellence Team.

- **Implement the residential grants immediately.** To have any impact on fall enrollment, residential grants need to be awarded to admitted students now. After reviewing Cindy's draft letter, I recommend that the team use, ***Residential Leadership Recognition Award*** rather than Residential ***Waiver.*** Prospective student awardees should view this as a special recognition, not as simply a reduction in a fee.
- **Incorporate financial flags in the new recruit-back, early-alert program.** Indicators such as incomplete FAFSAs, large outstanding balances, high-loan indebtedness, financial warning status should be included in the recruit-back, early-alert program. Work with members of that team to make sure that they are included.
- **Continue efforts to educate the MSUN community about financial aid, as well as the financial challenges faced by students.** Follow up with coaches and admission reps by providing them with a clear and concise Financial Aid Tip Sheet that includes the most essential information they must possess on financial aid purposes, policies, procedures, deadlines, etc. IMPORTANT: Use a scaled down version to include in the fall orientation for faculty and staff, as well as resident assistant training and orientation for all new freshmen and transfers.
- **Incorporate financial aid basics and financial literacy as core components of the mandatory "Study Skills Course" for at-risk students.** Work with Christine and Tracey to be sure these students will develop necessary skills for insuring their financial stability during their first term.
- **Continue efforts to use assessment to identify financial challenges for various student subgroups.** During our last meeting, I learned that in order to continue to receive the WUE, as well as various institutional grants and scholarships, students must maintain a minimum GPA. In the case of WUE, the standard is 2.5.
- **Continue your focus on reducing financial terminations**. Clearly the number of students that are financially terminated is a major contributor to the unacceptable retention rates. Therefore, I highly recommend that a tracking system be put in place to immediately determine and monitor the number of credits that students enter with as well as the relationship between credits accrued and financial aid credit thresholds. This must also be considered a TOP PRIORITY.

Next Steps: MSUN

Tracey and the action team members should focus immediate attention on the following priorities.

- Tracey and action teams should review the recommendations highlighted in this report and implement before mid-August at the very latest.
- Encourage action team coordinators to e-mail or call me for additional assistance and guidance in developing and completing their plans or as needed.
- Develop a comprehensive communication strategy to inform members (faculty, staff, students, alumni, etc.) of the MSUN community about the team's progress to date and your plans for the future.
- Continuously monitor your progress – meet as a working group (SSIT) at least twice a month and as action teams every week until all major strategies are fully implemented.

Next Steps: Noel-Levitz

- If requested, I will continue to provide additional information regarding best practices, products, and services that will assist action plan coordinators with the completion of their action plans.
- React to any request for information or advice.
- Review and critique the draft retention plan when it is available.