

**Center for Academic and Student Achievement**

**Self-Study**

**February 3, 2017**

## Table of Contents

<b>Mission</b> .....	1
<b>History</b> .....	4
<b>Administrative Service/Unit Goals</b> .....	11
<b>Quality Assurance</b> .....	15
<b>Budget and Expenditures</b> .....	24
<b>Assessment: Impact on Student Learning and Development, and Academic Success</b> .....	28
<b>Guide for the Future</b> .....	39
<b>Plans for the Future</b> .....	44

## MISSION

### **1. Write an introductory paragraph describing the Unit and support services provided. What is the Unit trying to accomplish?**

The Center for Academic and Student Achievement (CASA) is an academic support center located on the Hilltop campus of University of San Francisco. Under the Division of Student Life, CASA is comprised of 22 staff members: 10 administrative staff, which include an associate vice provost/dean, an associate dean and five assistant deans, and 12 academic success coaches/directors. Our mission is to provide students with compassionate academic and personal support that promotes holistic student development. Focusing on the Jesuit value of *cura personalis*, CASA is committed to increasing undergraduate student retention and graduation rates by engaging in intrusive advising practices, intentional outreach efforts, and being of service to others, while advocating and educating students to make decisions with compassion and thoughtful reflection. From orientation to graduation, CASA ensures that students have ongoing accessibility to academic support resources, whether it be through direct contact with their academic success coaches (ASCs) during office hours or in the residence halls, or via courses and academic support programs designed to empower students in their personal and academic endeavors. Our biggest partner in supporting student success is faculty. All undergraduate students are assigned both a faculty adviser in their major and an academic success coach in CASA. By meeting students where they are, our support in CASA often extends beyond academics. We help students navigate first-year transitional challenges, prepare them for difficult conversations with professors, make personal decisions that help shape their university experience, build community, and prepare them for life beyond USF. As a result, CASA is often considered as the ‘home’ that connects students, faculty, and staff with resources for student success (Appendix A: CASA Fact Sheets).

Despite CASA’s success in serving thousands of students since opening our doors in 2012, we are not without our challenges. Our academic success coaches are assigned a caseload size that averages 550 students per ASC, which includes an increasingly higher proportion of students with psycho-social/emotional needs, coping skills impairments and academic deficits. We are eager to define and assess student learning outcomes for all of our services/programs, and struggle with the use of multiple technical tools and software platforms to accomplish our daily work (which has been addressed by the University’s generous support to create a customized Salesforce case management system launching January 2017). We also recognize inconsistencies in how Colleges/Schools operate, perceptions of CASA, and our reporting structure, which we will elaborate more on in the Guide for the Future section.

## **2. Describe how the Unit's mission is aligned with the University of San Francisco's Mission and strategic priorities.**

USF's mission and vision are guiding frameworks for CASA's own mission and priorities.

### *USF's Mission*

*The core mission of the university is to promote learning in the Jesuit Catholic tradition. The university offers undergraduate, graduate, and professional students the knowledge and skills needed to succeed as persons and professionals, and the values and sensitivity necessary to be men and women for others.*

### *USF's Vision*

*The University of San Francisco will be internationally recognized as a premier Jesuit Catholic, urban university with a global perspective that educates leaders who will fashion a more humane and just world.*

*The university will distinguish itself as a diverse, socially responsible learning community of high quality scholarship and academic rigor sustained by a faith that does justice. The university will draw from the cultural, intellectual, and economic resources of the San Francisco Bay Area and its location on the Pacific Rim to enrich and strengthen its educational programs.*

In 2009, USF drafted the 2028 planning document that specifically called attention to five qualifiers that would enable the university to constantly work to achieve its overall mission. These are: Jesuit Catholic Education, Academic Excellence, San Francisco location, Diversity, and Global Perspective (Appendix B: USF 2028 Planning Document).

Following the 2028 plan, the President then issued a diversity initiative in 2016 by way of a university inclusion statement that reads:

*The University of San Francisco strives to promote safe, affirming, and inclusive communities for all students, faculty, and staff to learn and work together in alignment with the University's mission. These communities are enriched by the presence of people of different abilities, ages, colors, creeds, cultures, races, ethnicities, family models, gender identities, gender expressions, health statuses, nationalities, political views, religious, spiritual, and philosophical beliefs, sexual orientations, socioeconomic statuses, educational backgrounds and veteran statuses. We welcome, expect, and encourage the continued pursuit of knowledge, skills, and abilities necessary to build a more inclusive community which celebrates diversity and works toward justice.*

In alignment with the university's mission and strategic priorities, CASA's vision is *to be recognized as a premiere center that empowers students to reach their full potential by guiding students through a journey of self-discovery and personal growth.* With these principles in mind, CASA supports the University of San Francisco's Vision, Mission and Values of educating

leaders who will fashion a more humane and just world. We pride ourselves in meeting the needs of specific populations within the university community and, specifically, on being in a position to carry forward and reinforce at least three of the five university mission qualifiers related to Academic Excellence, Diversity, and the Jesuit Catholic Tradition.

The comprehensive range of academic support programs, targeted outreach, student advocacy, and level of compassion woven in CASA's everyday work underscores our alignment with the university mission and the Jesuit notion of *cura personalis*. Proud of USF's status as the 8th most diverse university in the country (Appendix C: US News & World Report Rankings) CASA recognizes that students arrive with a wide range of skillsets and needs. With such a diverse population, CASA's role is to ensure that ALL students have the same opportunities for success and academic excellence. For example, in its commitment to students who are the first in their families to go to college (more than 30 percent of our population), the university has charged CASA with the role of helping these students navigate the college environment and understand academic expectations.

We also understand that our students come from very different types of communities and vastly diverse educational and personal backgrounds. Some students are already global citizens who have traveled a great deal, are highly independent, and may only need assistance in establishing roots at USF. Others have had very little experience outside their family and community, and require extensive developmental and emotional support to live independently, handle the stress of rigorous academic coursework, problem solve, manage their time or form new social relationships. By determining individual needs and identifying resources to best support all students, CASA enables the university to uphold its commitment to inclusive academic excellence.

## HISTORY

### **1. What is the recent history of the administrative and / or service Unit and what are the most noteworthy changes? What changes have taken place since the last program review (if appropriate)?**

This is CASA's first program review. In September of 2011, several different USF units joined forces to fulfill the president's, provost's and founding associate vice provost's long-standing vision of establishing a centralized student support center known as CASA (Center for Academic and Student Achievement). One year later, CASA opened its doors, as staff members from the College of Arts and Sciences, Athletics, School of Management, and Academic Support Services were successfully moved into one central campus location to consolidate their functions and services.

Uniting all professional staff members with advising/coaching-related roles into one space to help standardize student services was key to CASA's inception. Given that staff were coming in with different roles from various offices, we had to first create a new organizational structure, which included new titles and a revision of roles and responsibilities. Our current structure is made up of an associate vice provost and dean of student academic services, associate dean of branch campuses, assistant deans, academic success coaches, and administrative staff (Appendix D: CASA Organization Chart). Each of the academic success coaches also serve as directors in specific functional areas, from outreach programs to communication, mentorship and persistence.

While designing the organizational structure, CASA staff worked simultaneously with Facilities, Information Technology Services, and USF project managers to identify a space and environment on campus that would be centrally located and easily accessible. With the help of architects and designers, a warm and inviting office was created on the third floor of the University Center building. This space would house all of our administrative staff and academic success coaches in individual frosted-glass offices, complete with a front desk and lobby area that supported student confidentiality and the integrity of our work.

Given that our goal was for academic success coaches to remain with their students from orientation to graduation, we then had to make decisions about how the undergraduate student population (approximately 6,500 students at the time) would be allocated to our staff. Our final decision was to assign specific residence halls, and floors within those halls, to each ASC. Since the majority of first-year students are required to live on-campus, we easily paired each incoming student with an ASC based on their initial on- or off-campus residency. This method of organizing our student allocations has been very successful and now, four years later, each

undergraduate student at USF has an academic success coach in addition to a major faculty adviser.

An important change occurred in the Spring of 2014 when, after several months of deliberation and discussion, the administration announced that the original title of CASA's university adviser would be immediately changed to *academic success coach*. The decision to change the titles was in part a response from both faculty and staff feedback alluding to confusion in distinguishing between the role of university advisers and faculty advisers. While identifying ourselves as academic success coaches did not change the scope of our services in any way, it more accurately reflected the work that CASA performs on behalf of students, and aligned with the mission of our Center and many of our programs dedicated to student success.

There was additional confusion for the first three years when CASA provided academic advising to undergraduate students in the School of Management (SOM). Retaining academic advising was not in CASA's mission nor would it be sustainable. As a result, a transition team was assigned to coordinate and develop a new advising model in SOM that would be aligned with the faculty advising model used by the College of Arts and Sciences and School of Nursing and Health Professions.

In 2014, SOM hired a new associate dean who was willing to find solutions to the Undergraduate Advising role of the School and faculty. Adjunct faculty were identified and trained by the assistant dean in CASA to provide transitional academic advising to freshmen and sophomore students. Additionally, a peer mentor advising model was developed to assist freshmen. Upper class students from the Business Honors Program were trained and earned a stipend for their organization. They held group advising sessions for first-semester freshmen to disseminate basic information on how to read their transcripts or degree evaluations, and stay on track to graduate.

As of Fall 2016, all SOM students are now advised by SOM faculty, either by the specific major faculty adviser, adjunct faculty or peer mentor (Appendix E: SOM Advising Flyers). There are several School-related functions that have remained with CASA, e.g. to administer the waitlists for SOM major electives and new transfer student evaluations. With the help of an assistant dean within CASA, academic success coaches have continued to support the faculty and students during this transition period.

Also, beginning in 2013, the SOM Dean assigned the academic advising of Adult Professionals, (undergraduate students completing their degree), to the librarians of each of USF's branch campuses. A manual was created and intensive training was conducted by an assistant dean from CASA along with other colleagues from Admissions, Financial Aid, Registrar's Office, etc. These training sessions were held in the library's electronic smart classroom where they were recorded. Upon completion of the training, it was found to be too tedious for librarians; it was

then decided that the advising of Adult Professional students at branch campuses was to remain with a single academic success coach in CASA that could provide consistency to the students.

Currently, the associate dean and an academic success coach for branch campuses provide academic and professional development to approximately 160 undergraduates enrolled at our five branch campuses: Sacramento, Pleasanton, San Jose, Downtown SF, and Santa Rosa. These two staff members visit each branch campus to ensure that students feel supported and receive the same services and resources as Hilltop students. This is accomplished by offering in-person office hours on a monthly basis (sometimes twice monthly) at all of the branch campuses, as well as holding online office hours weekly. An Orientation to Hilltop resources is also provided to all new students in order to assist them with transition issues, maintaining our goal and vision of students having a Hilltop experience at the branches (Appendix F: Timeline of Branch Campus Procedures and Gap Analysis of Branch Campuses).

## **2. What is the relationship of the administrative/service Unit to academic programs and other administrative units within the University (e.g., interdisciplinary programs, research centers, etc.)?**

CASA's most formal relationships are with the College of Arts and Sciences (CAS) and the School of Management (SOM). Both the College of Arts and Sciences and the School of Management have an assistant dean in CASA assigned to their respective student population. These two assistant deans are housed within CASA due to frequent student contact and the nature of the work which overlaps significantly with our mission and primary responsibilities. The academic services that they provide include the approval of many student related processes, including adding and dropping classes, approving Petition to Enroll in Another Institution (PEAI) forms, approving students into closed classes, change of academic program forms, Dean's honor roll, and other academic services such as the coordination of Webtrack (an advising program for new students). Additionally, there is a close relationship between these assistant deans and their respective faculty, resulting in constant collaboration where faculty provide information and resources to advise students effectively and resolve curriculum and student issues. Faculty will also regularly communicate with academic success coaches when they have a student struggling in their class with multiple absences, illness, family emergencies, disruptive behavior, or academic integrity issues.

CASA has a less formal relationship with the School of Nursing and Health Professions (SONHP). Although all undergraduate Nursing students are assigned an academic success coach, we do not have a specific staff liaison to the School. However, we do work closely with the SONHP associate dean and their staff in order to assist students who are disqualified from the Nursing program. In this way, we provide holistic support to Nursing students referred to CASA.

We also have many informal relationships with other university divisions and academic departments, including the Center for Institutional Planning and Effectiveness (CIPE). Most recently, a CIPE staff person assisted us in analyzing data gathered from a student retention survey that was administered annually from 2012 to 2016. This data helped foster conversations regarding CASA's responsibilities and identify opportunities where CASA could intervene and contribute to university retention efforts. CIPE staff then helped to analyze specific retention program areas within CASA such as the Muscat Scholars Program and the PACT program.

Close yet informal relationships exist with the university's Strategic Enrollment Management (SEM) office in that our work is impacted by each incoming cohort of admitted students. CASA, in tandem with the Admissions, Registrar's, and Graduation Center offices, provides extensive registration assistance, timely degree progression in collaboration with faculty advisers, and monitors Withdrawal/Leave of Absence reports to support ongoing retention efforts.

**3. Does the Unit form partnerships with other Units within the university? (e.g., academic or non-academic)? If so, how is the work coordinated within and across the various units?**

CASA's role on campus inherently involves collaboration with other campus units. In fact, we could not fulfill much of our day-to-day work without these important partnerships. CASA has several partners within USF, with some of our most structured partnerships existing with Athletics, Student Housing and Residential Education (SHaRE), the Learning and Writing Center (LWC), Student Disability Services (SDS), and International Student and Scholar Services (ISSS). Each partnership is described below:

***Athletics***

In CASA, we have three academic success coaches that serve as liaisons to the Athletics department providing academic support and assistance to student-athletes, athletic coaches and athletic staff. These ASCs are assigned to work with specific sports teams, carrying a caseload of 50-60 student-athletes each, (as part of their overall student caseload). One of the ASCs, in collaboration with the director of academic support for the Men's and Women's Basketball teams (housed in Athletics), serves upwards of 90 students. Liaisons will meet monthly with Athletic Academic and Compliance personnel to ensure a comprehensive support structure and create strategic alliances and initiatives that promote student-athlete success. Each ASC also holds weekly drop-in hours in the Athletics department and, in the past, have taught a transitional course targeting the needs of freshmen student-athletes. In addition to serving the current students, the three ASCs also provide prospective student-athletes and their families with an overview of support services and accommodations available at USF and CASA.

### ***Student Housing and Residential Education (SHaRE)***

Academic success coaches have designated weekly drop-in hours in each residence hall during the school year, in an effort to remain visible and accessible to students. They attend monthly and sometimes bi-monthly meetings during the academic year to discuss student cases with residence hall staff, with a focus on identifying students who may be struggling both inside and outside the classroom. In these meetings, specific student cases are discussed based on assessments and results from a student survey that is distributed the third week of classes to first-year students only. In the past, we have used both MAP-Works and ETS Success Navigator products as survey tools that inform us how first-year students are transitioning, which we will elaborate more on in the Assessment section of our self-study. After data is collected, “triage teams for interventions” are formed where CASA and residence hall staff are asked to reach out to students who may be struggling.

### ***Learning and Writing Center (LWC)***

In CASA, the assistant dean for academic development oversees the Learning Center and helps facilitate collaborative efforts for student success (Appendix G: Learning Center Organization Chart). Academic success coaches often refer students to the Learning Center for Supplemental Instruction, Peer Tutoring, sessions with Writing Center preceptors, Peer-led-team-learning and Project Success (an intensive, individualized study skills support program). Student progress is then monitored through the use of these Learning and Writing Center programs, and adjustments to programming are made as needs arise or change year to year.

### ***Student Disability Services (SDS)***

The assistant dean/director of SDS reports to the associate vice provost and dean of student academic services in CASA. CASA staff refer and closely collaborate with Student Disability Services to support students in the classroom. Students are often referred to SDS to help determine if there are any disability related issues that may be impacting a student’s ability to be academically successful.

### ***International Student and Scholar Services (ISSS)***

Although we have one designated ASC for International Student Advising Support, all academic success coaches provide academic support to international students. Internally, CASA has an international student committee that meets with the ISSS office regularly to review policy and procedures, identify new trends, and improve support services for international students. Many academic success coaches are also involved in representing CASA during International Student Orientation. At the beginning of each semester, ASCs assist the ISSS office in reaching out to under-enrolled international students. When it comes to academic decisions, CASA consults with ISSS regarding any impacts to immigration status, cases of reduced course load requests, or the academic disqualification process. CASA also helps international students from the School of Management to process OPT/CPT and program extension forms. By collaborating with ISSS, we

are able to take immigration regulation and cultural differences into account when we advise and coach international students.

### ***Gleeson Library***

CASA regularly collaborates with the Gleeson Library staff to help students enhance their knowledge of the library's resources and build information literacy skills. Library staff help with Peak Performance Sessions by leading a session on Preparing for Writing Research Papers, as well as a clinic for international students needing assistance with research paper writing. The library's computer classroom are made available for these workshops and other student skill-building sessions.

We also collaborate with the Library to help publicize our services and events. In turn, ASCs give students information about the library's resources and programs. In our College Success I: Success Strategies courses we require students to complete research-related assignments at the library. Within our Back on Track program for probation students we also promote the Library's resources by requiring students to meet with a research librarian, and encourage students to spend more time in the library. The MSP program also collaborates with three librarians who assist Scholars with learning about library services and information literacy.

### ***University Ministry***

Academic success coaches meet regularly with "Campus Partners" assigned to students in their specific residence hall. These monthly Campus Partners meetings take place with the hall's resident director, other ASCs assigned to the hall, and resident ministers living in the hall to discuss how to best support students. Using assessment data from the ETS Success Navigator survey, CASA will generate a list of students who are especially homesick, and share this list with resident ministers so that the ministers can reach out to the students with an invitation to the hall tea parties.

Students in our Back on Track program are also encouraged to attend University Ministry retreats as an option to fulfill Back on Track program requirements. ASCs often refer students to these retreats and other University Ministry events to help students connect to the university community, make friends, explore their spiritual development, or serve the community. In collaboration with CAPS and University Ministry, an international student retreat is offered as part of their extensive retreat schedule. Additionally, University Ministry staff will collaborate with CASA and other members of the Peak Performance Sessions committee to provide a full, balanced, array of workshop sessions that help students thrive.

In the event that a student experiences a death or tragedy in the family, CASA staff members will regularly refer students to University Ministry for support. Their services also benefit students

experiencing loss, or transitional challenges, who may be seeking out a religious community to help them through the grieving and healing process.

ASCs also encourage students to take advantage of Immersion trips offered by University Ministry. These trips are often life-changing opportunities, and are an important option for students who are unable to study abroad for a semester or more. CASA plays a key role in promoting these unique opportunities to students who might otherwise be unaware that the option is available to them.

### ***Other Collaborations***

Although our relationships are less structured, CASA staff members work very closely with Counseling and Psychological Services (CAPS) in cross-referring students and consulting with staff about student cases. ASCs and counselors in CAPS work together to support the student through crises and challenges. We also consult with staff in Financial Aid office within Strategic Enrollment Management (SEM), regarding students in financial need. Often times we speak with students who say they are in need of emergency funding, and we consult with the director of Financial Aid to confirm that they have maxed out their financial aid package, before looking into other possible avenues for support. Academic success coaches and assistant deans will regularly consult with the Priscilla A. Scotlan Career Services Center for career advice in specific majors, the McCarthy Center for service-learning opportunities, the Center for Global Education for study abroad programs, and the Office of Student Leadership and Engagement for campus involvement opportunities. We also help study abroad students with the pre-departure course approval process and make decisions related to any academic regulation exceptions.

In order to best serve students, CASA staff are cross-trained with many of these campus units. We meet regularly to share updates in academic policies and regulations, particularly across the schools and colleges, but also with ISSS and other units that have policies impacting our students. We regularly discuss transfer credit policies and admission procedures as well as individual student transfer credit issues with our colleagues in the Admissions office.

## ADMINISTRATIVE/SERVICE UNIT GOALS

### **1. List the goals that will allow the Unit to fulfill its mission. Please provide a curriculum map aligning the University Mission, Unit goals, and the services provided.**

To fulfill our mission of providing compassionate academic and personal support that promotes holistic student development, CASA's central goals are:

- Increasing student retention
- Increasing four-year graduation rates
- Ensuring consistency and reliability in academic support services

To meet these goals, CASA provides the following services and resources to students:

- Assistance in developing a four-year graduation plan in collaboration with faculty advisers
- Online assessments, tools and coaching for students exploring majors
- Help with coping skills development for managing transitional challenges, homesickness, stress or anxiety
- Academic workshops and courses focused on time management, preparing for exams, note-taking, and self-care to name a few
- Assistance in completing and processing academic forms
- Help developing relationships and making direct connections with campus staff, peers, and student organizations
- Tips on self-advocacy, how to ask for help, approaching professors and utilizing resources
- Proactive outreach to students identified as at-risk, on leave, or on academic probation
- Help understanding policies and procedures related to academic support and the implications of administrative decisions
- Space and opportunities to engage in open dialogue about personal or academic concerns
- Compassion, hope, and encouragement for all their personal and academic endeavors!

As students engage with CASA, we have identified the following Student Learning Outcomes and expect that students will:

- Become aware of educational and career options, and develop practices for their own academic and personal success.
- Understand how to navigate myUSF, and their degree evaluation, in order to keep track of their timely progress toward graduation.
- Take advantage of campus resources and support services designed to encourage their learning and personal development.

- Take responsibility for their personal growth and reflect on their curricular and co-curricular learning experiences – accepting responsibility for their decisions and actions.

**2. For each goal, list measurable objectives (it's not about the number of goals or outcomes but rather about generating evidence that support the Unit fulfill its stipulated mission). That is, what a student should know, do and value as a result of utilizing the services.**

Through the program review process, we are creating measurable objectives for our student learning outcomes, which is an area we intend to focus on spring 2017.

The table below captures CASA's current goals and measurable outcomes.

GOAL	MEASURABLE OBJECTIVES
Increase student retention	<ul style="list-style-type: none"> <li>• Gain faculty participation in submitting Early Alert progress reports</li> <li>• Monitor students who are on academic probation</li> <li>• Monitor students who are at-risk and connect them with the appropriate resources for ongoing support such as SDS, CAPS, Case Manager</li> <li>• Build community within residence halls by holding monthly meetings and weekly office hours</li> <li>• Monitor student's academic, financial, and other regulatory-related statuses (i.e. not falling below 12 credits and jeopardizing full-time status, financial aid, housing, or immigration status)</li> <li>• Provide one-on-one academic coaching that empowers students to achieve their academic goals</li> <li>• Provide a supportive environment that promotes personal growth and the values of a Jesuit education</li> </ul>
Increase four-year graduation rates	<ul style="list-style-type: none"> <li>• Help students understand their progress toward a timely graduation, and utilize DegreeWorks platform</li> <li>• Collaborate with faculty advisers in completing a four-year projection plan</li> <li>• Offer registration support (Webtrack, SOM Advising, Undeclared students) during critical times of the year</li> <li>• Connect students to academic programs and personal resources on campus designed to support, promote, and encourage their success</li> <li>• Help students develop academic skills to successfully meet the demands of USF's rigorous curriculum</li> </ul>

	<ul style="list-style-type: none"> <li>• Provide mentoring and coaching that is supplemented by 30+ workshop sessions on specific student development topics such as time management or exploration of majors</li> </ul>
<p>Ensure consistency and reliability in academic support services</p>	<ul style="list-style-type: none"> <li>• Assign and pair each new incoming student with an academic success coach</li> <li>• Serve as main point of contact between students and faculty when health or emergency issues arise</li> <li>• Implement a structured communication plan for student outreach and response</li> <li>• Review internal administrative policies and procedures and identify efficiencies or modifications that need to be made</li> <li>• Provide students with an overview of USF requirements and policies and procedures relevant to each student's case (i.e. adding or dropping classes, PEAs, directed studies, leave of absence, study abroad)</li> <li>• Maintain and uphold FERPA confidentiality agreements</li> <li>• Provide ongoing staff development and training opportunities</li> <li>• Engage in regular case study reviews to cross-train and troubleshoot department response protocol</li> <li>• Run regular reports on student visits, with specific considerations to volume and visit reasons</li> <li>• Provide ongoing accessibility to one-on-one appointments and availability in the residence halls for additional support</li> <li>• Utilize an online database platform to track general meeting notes and outcomes from student visits, to inform future outreach</li> <li>• Serve as advocates or mediators for students/faculty in student/faculty issues</li> <li>• Serve as liaisons between students and parents, as needed</li> <li>• Develop marketing materials and promote CASA's support services throughout the university</li> <li>• Maintain awareness and develop relationships with campus constituents who can serve as campus resources</li> </ul>

### **3. How do these goals facilitate the Unit's overarching mission geared toward supporting student learning, development and/or academic success?**

These goals are fundamental to facilitating CASA's overarching mission in that holistic student development and academic success always remain at the forefront. We engage in careful planning, and concise outreach efforts, to integrate compassion and *cura personalis* with university services that ultimately support retention and persistence. By working towards our

goals and objectives, we are able to deliver a cohesive student experience that is strongly aligned with our mission.

## QUALITY ASSURANCE

### 1. What services/products does the Unit provide? Whom do they serve?

In support of our mission to provide compassionate academic and personal support that promotes holistic student development to all undergraduate Hilltop and branch campus students, in addition to supporting faculty, staff and families, we offer a comprehensive list of services/programs that are outlined below (Appendix H: CASA Sample Case Studies and Questions).

CASA offers student support in many ways, but the key component to our work is our one-on-one academic and personal coaching, including crisis and conflict management for students. Our goal in working with students is to create relationships, and build trust, which encourages students to keep coming back for support when needed. CASA is a “home away from home” for students. We celebrate in student victories and are there to support students when they have academic and personal difficulties. Ultimately, our goal is to help students successfully graduate from USF in a timely manner, and to see them grow and thrive as men and women for others. Our dedicated and compassionate staff in CASA strive to reach as many students as we can to offer this holistic and developmental support.

#### *Coaching*

- One-on-one academic and personal coaching for students, in collaboration and consultation with faculty, College/School deans, and other campus offices
- Four-year planning and preparation for graduation, in collaboration with faculty advisers
- *Explore Your Path*, an online portal for students to navigate major and career exploration resources, with connections to campus resources that can assist them in the decision-making process
- ETS Success Navigator survey tool used to identify at-risk first-year students early on in the semester and facilitate follow-up with outreach and support by academic success coaches and SHaRE staff
- Registration Assistance (Add/Drop, Closed Classes, SOM Waitlist Management)
- Leave of Absence/Withdrawal assistance for students
- Assistance with the process of approving non-USF courses for transfer credit for students planning to Study Abroad

#### *Support Programs and Workshops*

- Early Alert program, an online student progress reporting tool (we’re currently transitioning from Advisortrac to Salesforce) for faculty to inform us when students are performing below a “C” level at mid-semester, or to report students having attendance or personal issues that may impact their ability to successfully complete the class

- One-credit College Success Courses for students to learn academic success skills and strategies
- International Student Workshops and Retreats to foster peer connections and engagement with the community, and to offer tips and guidance on how to succeed in the American classroom
- Peak Performance Sessions for students, focusing on topics such as test-taking, time management, techniques for self-care, staying on track to graduate and career planning
- Peer Mentoring pilot program for students within major departments to provide peer-focused academic support and serve as liaisons between faculty and students
- Support for the TransferNation student group to help transfer students connect, learn and support each other as a community and learn about resources to help them with academic and social transitions
- Webtrack advising and registration program for incoming students provided in coordination with faculty advisers from the School of Nursing and Health Promotions, School of Management and College of Arts and Sciences (Appendix I: Webtrack Faculty Advising Statistics).

**Back on Track** is a unique program that was designed to support students who are not meeting the university's minimum 2.0 GPA requirement and are on academic probation or have been academically disqualified. Each semester, we review the students who have earned above or below a 2.0 GPA, and identify who will be (1) placed on probation, (2) continued on probation, (3) removed from probation, or (4) who will be academically disqualified.

All probation students in the Back on Track program are required to sign a probation contract where they acknowledge the consequences of their academic standing and university requirements. They must also attend two one-hour, one-on-one meetings with their Academic Success Coach throughout the semester, in addition to asking their faculty to complete and submit progress reports to indicate how they are doing in each of their classes at the mid-semester time period. In the second one-on-one meeting between coach-student, progress reports are reviewed and discussions are held around additional workshops or college success courses that they are required to attend.

For students who have been academically disqualified, there is also a rigorous reinstatement process that requires students to complete an application (that asks them to reflect on the reasons that contributed to their poor academic performance), submit a letter of support, and participate in an appeal hearing with three members from CASA. In this meeting, the committee will ask about the student's commitment to making change and determine their readiness to return and succeed academically at USF. If reinstated, all students are given certain academic conditions they must meet in addition to completing the Back on Track program requirements with other

students on probation (Appendix J: Back on Track Program Folder and Disqualification Appeal and Reinstatement Process).

In CASA, we also have two signature programs that were designed to support specific student populations.

**Muscat Scholars Program (MSP)** helps first-generation college students achieve their goals by introducing them to academic expectations at USF and helping them design their own unique path to success. Scholars participate in a two-week academic and social preparation program prior to the start of their first semester at USF, and continue to live together as a cohort for the remainder of their first year. Scholars are assigned a peer mentor, a staff mentor, and a “tribe”; three elements that will provide them with social support throughout the program and their stay at USF. We believe that our program’s structure, intensive support, and its staff, faculty and peer mentors create conditions where participants become self-sufficient and confident as learners and members of the USF community (Appendix K: Muscat Scholars Program Brochure). The program’s goals are:

- To develop and enhance the essential academic skills needed to successfully meet the demands of the University's rigorous academic curriculum;
- To build a bridge between the participants' home communities and the USF learning community through exploration of the participants' cultural values and perspectives, and by gaining an understanding of one's own unique process of growth and development;
- To explore the values, skills and knowledge needed to function effectively as part of a multicultural university and world;
- To provide a collaborative and mutually supportive learning environment that recognizes and promotes the value of a college education; and
- To help participants take advantage of campus resources and opportunities in order to succeed as scholars and as student leaders.

**PACT** is a program designed to provide men of color with a support structure that meets them where they are. Students are provided with the skills necessary to successfully navigate the circumstantial issues they face, by increasing their confidence, self-efficacy, involvement and well-being, and developing characteristics that empower them to reach back (Appendix L: PACT General Overview).

The program focuses on self-identity, partnerships, accountability, mentorship, commitment and successfully leveraging campus resources to create a holistic support system. Workshops, seminars, and activities will be tailored to engage, enhance and create a brotherhood amongst undergraduate men of color that encourages their educational, professional, and personal development. The program's goal are to:

- Increase the intentional support of men of color on our campus.

- Create an environment where men of color hold one another accountable, leveraging relationships and mentorship.
- Promote self-exploration, personal and leadership development as well as community engagement amongst participants.
- Collectively change the narrative used to describe young men of color (even amongst themselves).
- Surround aspiring young men of color with men who resemble and share their daily experience navigating life as a man of color.
- Design opportunities to interact and involve middle school boys of color on our university campus.
- Develop an intergenerational mentor program that empowers men of color to develop their strengths and purposefully engage with the community on and off campus.

Lastly, our office processes over 3,000 administrative forms per semester in support of students and faculty. These include:

- Add/drop forms for class registration
- Change of academic program forms
- Course waiver/substitutions
- Directed study
- Change of grade
- Petition to enroll at another institution
- Request for tuition adjustment
- Closed classes approval
- Common application transfer forms
- Letters of good academic standing
- Curricular practical training (CPT) and optional practical training forms
- Grade appeals
- Study abroad exceptions

## **2. How does the Unit learn about the needs of those served and obtain feedback regarding service delivery?**

To learn about the needs of our students, CASA implemented a survey system to ask specific questions about CASA services, including the Webtrack registration program. For the first three years, we relied on the MAP-Works student survey data acquired in the first three weeks of the fall semester. As of September 2016, we switched to a new product called ETS Success Navigator, which delivers similar data and provides unique insight about areas and services we are doing well in or need to give greater attention to. We will continue to evaluate pros and cons, in consultation with USF's assessment staff, of using an outside survey tool like ETS Success

Navigator for gathering student data. Currently, the survey data informs us which new students we should direct intrusive interventions strategies, in order to connect with students during the critical first 3-4 week timeframe of each fall semester.

We also collect student feedback to help us improve programs and better meet student needs.

Program evaluations are completed by:

- Students who attend our Peak Performance Sessions
- Academic probation students participating in our Back On Track program
- Students enrolled in College Success courses and the Muscat Scholars program

We have identified a need for collecting more comprehensive student data that will allow us to get a 360 degree view of a student in order to respond to student needs. Therefore, we are currently developing a robust case management system via Salesforce that will allow us to administer satisfaction surveys, track student data, and create reports in a simpler and efficient manner. This will also help to inform decisions impacting the Schools and Colleges, as we regularly cross-share data with deans, associate deans and faculty, primarily through the two assistant deans who are liaisons with the School of Management and College of Arts and Sciences.

### **3. How does the Unit know it is meeting the stakeholder's needs?**

We plan to do more formal surveys to provide data about how we are meeting students' needs through specific programs and services. On a near-daily basis we receive anecdotal feedback from individual and group conversations with students, as well as thank you letters and emails that help to confirm that we are meeting students' needs. We use the BANNER Student Information System to examine the effectiveness of our Back on Track program by comparing pre- and post- GPAs. We also look at other variables such as number of contacts, visits, and scheduled appointments, noting that many of these students have extreme support needs relating to mental health, disability, family conflict and other issues. We also track the number of students referred to CASA by faculty members, and the extent to which faculty involve us in new faculty trainings, departmental policy and advising discussions when they consult with us on student issues. The more collaboration and interaction we have with faculty, the more we know that we are reaching students in need of our support.

With MSP in particular, we know that one of the major features that program alumni consistently rate as most impactful is the community service component. In Tribes, Scholars will be going to many venues in the City of San Francisco to partake in two community service activities over two days to learn more about the City and discover the importance of service learning as a student at the University of San Francisco. After the intensive two-week summer program, Scholars report that the community feeling that MSP provides is a great foundation for their stay

at the University. Scholars also report feeling like they are at home at USF - knowing what resources are available, who to go to, and where everything is!

#### **4. What are the Unit's planning, decision-making, and evaluation processes?**

To ensure that the unit is consistent in decision-making processes, CASA staff discuss any discrepancies that have come up at weekly staff meetings. These meetings serve as opportunities for staff to provide input in departmental planning and evaluation of processes in the department. Specific meetings are also dedicated to discussing student case studies, where staff can share best practices, brainstorm on student challenges and gain professional development from one another. Separately, as of Fall 2016, the dean, associate dean, and assistant deans participate in monthly CASA Leadership meetings to discuss immediate and long-term initiatives that may affect policies and procedures.

CASA staff also contribute to the unit's planning, decision-making, and evaluation processes by participating in internal committees that focus on the following objectives: academic probation and disqualification; administrative policies and procedures; case management; communications and marketing; international students; new student orientation; peer advising and student experience; retention and assessment; staff development and trainings; and lastly, undeclared and exploratory students. Moreover, our staff are integral members of numerous University committees such as the Retention and Persistence, Student Life Leadership, Council of Associate Deans, and Crisis Management and Behavioral Intervention Team (CMBIT) (Appendix M: CASA Committees).

CASA staff also participate in an annual year-end retreat to review and create the unit's strategic goals and objectives, which we assess and reevaluate during the academic year. We reference the Council for the Advancement of Standards in Higher Education (CAS) and National Academic Advising Association (NACADA) standards and core values of academic advising when creating our goals and objectives. This last academic year, we asked our internal CASA committees to create goals for their committee that are aligned with our strategic priorities. We then check in regularly at staff meetings to share and assess progress on committee goals (Appendix N: Strategic Goals 2015-2016).

To evaluate the effectiveness of our programs, we solicit feedback from our participants through surveys and focus groups. For example, the Muscat Scholars Program data shared in the previous section was achieved by conducting focus groups, to ensure the program is supporting the needs of their scholars. Feedback from the Back on Track program survey helped us make positive changes such as the new Canvas course online format.

CASA's associate vice provost and dean of student academic services, reporting to the vice provost of student life, guides us in our decision-making and makes sure current policies and procedures, as well as the direction and vision for the future, are aligned with the university. Finally, the AVP/dean and other staff members regularly work with staff in the dean of students/vice provost's office to resolve complex student issues. Once each resolution is reached we revisit our own policies and procedures and make adjustments accordingly.

##### **5. How do stakeholders learn about and access the services/products provided by the Unit?**

As students submit admission deposits, welcome letters and emails with CASA-related information are sent to new incoming students and their parents. Just before students come to campus they receive postcards and emails with the name of their assigned academic success coach. A short presentation is given at Orientation, where students can meet their ASCs for the first time, with posters displaying additional information in the residence halls as invitations to connect. For all new and continuing students, we send several emails throughout the semester reminding them about programs, academic policy reminders, and residence hall drop-in hours. For students who are on academic probation, several letters and emails are sent throughout the semester regarding their probation status and the Back on Track program requirements they must complete. For Peak Performance Sessions and College Success courses, students are sent emails and brochures. Flyers, posters, and word of mouth are also used to publicize specific programs, events, and important dates throughout each semester. Website changes are made periodically to reflect updated drop-in residence hall hours, coach profiles, and resource materials for students.

To supplement our outreach throughout the year, CASA regularly engages in a variety of presentations that help to increase awareness of CASA's services among students, faculty, staff and parents. Student audiences include ASUSF (Student Senate), Phi Delta Theta, TransferNation, Muscat Scholars Program, and USF 101. Opportunities to present to faculty and staff include New Faculty Orientation, New Faculty Luncheon, Provost Council, Council of Associate Deans, College Council, department trainings, and Admissions staff meetings. As new staff are hired in different university departments that we collaborate with, informal meet-and-greet sessions are coordinated to ensure that our relationships and understanding of one another's work remains strong. Lastly, our services are marketed to families, alumni and prospective students at Admissions events, University Open Houses, Parent and Family Weekend, and Alumni Weekend events (Appendix O: CASA's Marketing Materials).

For the MSP program specifically, as much as it is an orientation to USF, it is also an orientation to San Francisco. We know that many students come to USF having never visited San Francisco before, so there are daily field trips as well as larger group outings worked into the program that help students get familiar with their new home and city. Throughout the first year, Scholars will meet monthly in cohorts and individually to build and review their Success Plan. This is an

essential component of the program and ensures that students stay focused on their success during the school year.

Additionally, there are four courses that MSP scholars must complete during the program: Intro to College Writing, Intro to College Math, Contemporary Issues, and Information Literacy. Each of these courses are taught by University faculty/lecturers or USF alumni. Two optional MSP courses are also offered; Psychology of Success (a one-unit course) and Career Exploration (a one-unit course) that looks at the intersections of career and college and how to maximize the college experience. Both courses are taught in the residence hall and further builds the MSP experience. Lastly, there are two retreats planned throughout the year to maintain community-building and peer relationships.

**6. How does the Administrative/Services Units compare with peer institutions in terms of structure, responsibilities, size and budget? Specify the criteria by which these institutions were selected for comparison.**

We selected a mix of peer Jesuit and other institutions with academic support centers serving a similar number of undergraduate students. There is a wide variance in the delivery of academic support and advising across these institutions. We did initial benchmarking with Santa Clara University when CASA was created, but we have evolved our model based on the needs of our student population.

<u><i>Institution</i></u>	<u><i>Office/Dept Name</i></u>	<u><i>Undergrad Population Served</i></u>	<u><i>Number of Staff</i></u>	<u><i>Reporting Structure</i></u>	<u><i>Notes</i></u>
<i>University of San Francisco</i>	Center for Academic and Student Achievement (CASA)	6,782	22 Total Staff: 12 ASCs, 4 Asst. Deans, 1 Assoc. Dean for Branch Campuses, 1 Associate Vice Provost/Dean, 4 Admin Staff	Reports to the Vice Provost of Student Life	
<b>Colorado School of Mines (Mines College) - 5 years</b>	Center for Academic Services and Advising (CASA)	4,533	22 Total: 1 Director, 1 Admin Coord., 1 Assoc. Direct. of Disability Services, 4 Academic Advising Coordinators/Professional Staff, 10 Peer Advisers, 15 Tutors	Reports to Student Life	Included 1. Disability Services, 2. Learning Services/Tutor, 3. Supplemental Instruction, 4. Some Faculty Hold Drop in Hours in CASA, 4. Advise students until they declare a major
<b>St. Louis University</b>	The Office of Academic Advising	8,687	7 Academic Advisors (Arts & Sciences), Faculty Mentors	Reports to Student Life	Advisers split into Arts & Sciences, Business

<b>Georgia College</b>	Academic Advising Center (Center for Student Success)	5,927	22 Total Staff: 1 Assoc. Provost for Student Success, 18 Academic Advisors, 2 Admin Staff, 1 Senior Dir. for Advising and Retention	Reports to Student Life	First Year Academic Seminars, POUNCE Registration for incoming students, 1 advising meeting per year (30, 60, 90 units) required for all new students,
<b>Santa Clara University</b>	Drahmann Advising and Learning Resource Center	5,385	16 Total Staff: 1 Dean of Academic Support Services, 1 Asst. Dean, 1 Asst. Dean of Learning, 3 University Advisors, 6 Faculty Advisors, 1 Dir. of Summer Sessions, 1 Operations Manager, 1 Sr. Admin. Asst., 1 Technology Coordinator	Reports to the Associate Provost: Undergraduate Studies	Included 1. Learning Center (tutoring) 2. Dir. of Summer Classes
<b>Loyola Marymount University</b>	Academic Resource Center (ARC)	6,162	4 Total Staff: 1 Dir., 1 First to Go Coordinator, 1 University Advisor, 1 First to Go Admin. Asst.	Reports to the Provost	Included 1. Tutoring 2. Writing Support 3. Disability Support Services

## BUDGET AND EXPENDITURES

### 1. Provide a budget allocation and expenditure summary for the past three fiscal years.

For the past three fiscal years, CASA's budget has traditionally been allocated across five categories: Student Support Services and Initiatives, Student Staff, Printing/Copying/Marketing Materials, Operational Costs/Office Supplies, and Staff/Professional Development. Despite the growing student body, and increase in CASA staff size, our operational costs have been fairly consistent across the board. Evidence of our fiscal responsibility can be seen in the declining costs for printing/copying/marketing materials, in addition to a significant reduction in student staff spending (a result of many of our student staff graduating, leaving open positions that we have yet to replace). We have discovered efficiencies in certain areas, and adjusted spending in others, in response to student and university needs. As a result, we have been in a position to contribute to university-wide budget cuts in FY15 and FY16.

<b>EXPENDITURE SUMMARY</b>	<b><i>FY 2014</i></b>	<b><i>FY 2015</i></b>	<b><i>FY 2016</i></b>
<i>TOTAL OPERATING BUDGET</i>	\$287,558	\$300,495	\$310,414
<i>i. Student Support Services and Initiatives</i>	\$89,149	\$117,242	\$89,894
<i>ii. Student Staff</i>	\$73,939	\$54,113	\$37,396
<i>iii. Printing/Copying/Marketing Materials</i>	\$61,497	\$32,741	\$29,176
<i>iv. Operational Costs/Office Supplies</i>	\$31,149	\$32,080	\$30,031
<i>v. Staff Professional Development</i>	\$29,348	\$44,527	\$36,769
<i>vi. One-time University Budget Cuts</i>	--	\$15,000	\$15,000
<i>REMAINING BUDGET</i>	\$2,476	\$4,792	\$72,148

### 2. To what extent does the allocation of resources allow the Administrative/Service Unit to meet its goals and objectives? Is there a close alignment between the costs of running the Unit and budgeted resources?

Fortunately, CASA has received increasing budgetary assistance from the university over the years. With these resources, CASA has sufficiently met its goals of providing holistic student support through a variety of programs and initiatives geared toward student retention, academic services, and enriching student experiences. Likewise, great attention is given to professional

development opportunities and creating and maintaining an environment/space that fuels the sensitive work that takes place with students on a daily basis. While there has been a close alignment between the costs of running the Unit and our budgeted resources, the fluctuating size of each incoming class often makes financial management unpredictable. As a result, resource allocation is revisited and adjusted each year to accommodate for the fluctuation, with an effort to mitigate any chances of our student services being compromised. As demonstrated in the table above, spending is focused predominantly in five areas that include the following services:

### **A. Student Support Services and Initiatives**

- Muscat Scholars Program: dedicated funding ensures that first-generation students are able to experience/engage in activities and events that cultivate their development and assist in their transition to the university. Costs include program materials, field trips, transportation, monthly dinners, retreats and the employment of faculty, student mentors and staff.
- First-year student success survey (currently ETS Success Navigator, formerly MAP-Works): this proactive retention tool is designed to yield survey results that help academic success coaches connect with students, understand how they are transitioning to USF, what challenges lie ahead, and what support services can be provided to help meet those challenges. Costs include annual software licenses, student data management, customer service support, survey implementation and launch events, and incentives to drive survey completion.
- Tailored student programming (such as PACT, TransferNation, and International student events) and Peak Performance sessions (student success workshops) are offered throughout the semester to create learning opportunities, foster student development, and nurture a sense of community among specific student populations. Costs often include presentation materials, retreats, food and beverage, guest speakers, student scholarships, awards, program materials for workshops, seminars, activities, and transportation.
- Senior Class Celebration; an event held each semester to celebrate graduates and their accomplishments. Approximately 200 students attend in the fall, and 500 students attend in the spring. Established in Spring 2014 in partnership with ASUSF (the university student senate representatives), this event has since become a university tradition that recognizes their achievements while encouraging peer and alumni connections. Costs include food and beverage, security, staffing, giveaways, and decorations.
- Limited 'emergency funds' are also available to support students in crisis and/or in need of assistance with books or living expenses; as determined by the dean and level of need.

### **B. Student Staff**

CASA is committed to providing on-campus job opportunities to students who can also benefit and develop from their increasing job responsibilities. As a result, CASA employs between five

to seven student assistants throughout the academic year who are critical to the success of internal administrative operations.

### **C. Printing/Copying/Marketing Materials**

In partnership with the university's Office of Marketing and Communication, CASA has taken significant effort to create awareness and interest around campus about the student support and services available in our office. To support our strategic and comprehensive communication plan, costs have gone toward a variety of marketing and promotional items such as brochures, welcome letters and postcards, targeted emails, custom website pages, posters, handouts, student video testimonials, and giveaways.

### **D. Operational Costs/Office Supplies**

Monthly inventory is completed in an effort to be mindful of spending on office supplies and materials needed to fulfill day-to-day administrative operations for a staff of 22 individuals, and five to seven student assistants. These costs have remained consistent year to year.

### **E. Staff Professional Development/Conference Registration and Travel**

Staff are encouraged to join regional, national, and global professional organizations and communities to further their knowledge and skillsets in the field of higher education. Annual opportunities to attend professional conferences are also available to staff who are eager to stay on top of national trends. Costs cover membership fees, conference registration, travel and lodging.

### **3. What changes could be made to produce greater efficiencies or economies of scale (e.g., reduction, modification, elimination of paperwork, reorganization)? What constraints must the Unit address to achieve these?**

To produce greater efficiencies throughout CASA, and in response to university budget cuts, a conservative approach to spending has been adopted, which we intend to continue.

For example, in the last year, a policy was put in place to limit staff conference attendance to (1) one regional or (1) one national conference of their choice per fiscal year (unless the staff member has been invited to present or is on the panel). In lieu of mass attendance to a particular conference, staff are then responsible for cross-training and educating one another on relevant academic coaching topics and resources.

### **4. What improvements are possible through reallocating existing resources?**

In recent years, CASA has had to assess and reallocate existing resources, specifically in reducing the amount of promotional materials and giveaways distributed to students. Instead, these funds have been redirected to support more meaningful and impactful academic services, and professional staff development.

CASA has also been fortunate enough to receive incremental donations from external parties such as parents and alumni. Driven by the desire to demonstrate immediate impact, these discretionary funds were primarily utilized to support the launch of new pilot programs such as PACT in 2015, and in providing increased financial support to students identified at-risk or in crisis. As a result, we were able to offset several costs and use less of our university operating budget in FY16.

CASA staff have been respectful of and responsive to university budget constraints. In response to one-time university budget cuts, and in alignment with other university departments and constituents, CASA consecutively gave back \$15,000 from its operating budget in 2015 and 2016 (see spending area above as identified by 'iv.'). Although this impacted CASA's ability to expand on existing programming, we are confident that our operational needs can be met by continuing to reallocate existing resources.

#### **5. What improvements can only be addressed through additional resources?**

CASA's greatest need is for additional academic success coach and administrative support staff positions. CASA has responded to an increasingly higher proportion of students with psycho-social/emotional needs, coping skills impairments, and academic deficits. Unfortunately, our operating budget has not increased proportionately to the growth and needs of our undergraduate student body and we are unable to serve the community of students and faculty at the level we desire. Currently, ASCs are managing caseloads of approximately 550 students. This level of work is unsustainable long-term. With additional staff, CASA could accommodate the increasing number of students expected to be admitted each term, alleviating and reducing the caseloads for coaches who are already over capacity and cannot take on further student assignments. In turn, this would give coaches the opportunity to provide greater high-touch attention to a smaller caseload of students.

With additional funding, space, and staff we could also increase programming for specific at-risk student groups. This would first require resources to support a dedicated review process for existing programs and attrition factors, using assessment tools and focus groups. Results could then inform strategic planning and program development. However, despite some financial resources available to meet this need, our staff members are currently overextended and unavailable to manage outside academic support programs in tandem with their caseloads.

## ASSESSMENT: IMPACT ON STUDENT LEARNING AND DEVELOPMENT, AND ACADEMIC SUCCESS

### **1. Provide a summary of how critical administrative processes and/or the services are assessed or evaluated in the Unit, and the results of those evaluations.**

We have built evaluation systems into most of our programs and services in order to obtain student feedback, but because CASA is still at such an early stage of development as a department, most of our research has only focused on how to improve our current services and programs.

#### *MAP-Works*

During our first four years (2012-2015), the MAP-Works student retention software and assessment tool was used to identify at-risk students early on in the semester. Approximately 85% - 90% of all first-year and new transfer students completed the “USF Achieve” survey three to five weeks after classes began each fall. Survey questions addressed personal and academic adjustment issues and the degree to which students felt connected to the university (Appendix P: MAP-Works Survey Data). Survey results were then analyzed and integrated with demographic data from our university Banner system. Students were categorized as “red-yellow-green” according to how successful they were in adjusting to life at USF. These color-coded results helped CASA staff determine which students to reach out to most urgently; with ‘red’ and ‘yellow’ students being a priority. Simultaneously, students would receive an email with a student success guide that summarized certain aspects of their survey answers, offering suggestions and areas for further exploration.

The MAP-Works tool helped CASA staff better understand students and their needs. When compared against other data that had been gathered from the student population as a whole, one of the main findings was that USF students scored relatively low in “peer connections” and “test anxiety”, which were identified as critical areas for academic success coaches to address. Students on the whole reported average levels of communication skills, self-discipline, time management, financial concerns, academic self-efficacy, basic academic behaviors and academic resiliency but many indicated clear needs for support in those areas.

Some of the most helpful information gathered from MAP-Works was acquired from the open-ended response questions that we were able to customize. An example of one of the questions asked in the Fall 2014 MAP-Works/USF Achieve survey was: *In what ways has the Center for Academic and Student Achievement (CASA) and or your academic success coach assisted with your transition to USF? We had 700 new students (freshmen and new transfers) provide written responses to these questions. About 40% of these students stated that they had met with, spoken to, or had other helpful/positive contact with their coach or someone in CASA. These*

interactions had taken place prior to the third week of classes when the survey was distributed. Below are a few examples of how student responses to the open-ended questions were aligned with CASA's mission and goals:

- *They directed me to the appropriate faculty member for my questions*
- *They helped me get organized and made the process less stressful*
- *I can come to them for anything that I may be unsure about or even if I just need someone to talk to. They know what it takes to be successful.*

A staff member from USF's data services office, the Center for Institutional Planning and Effectiveness (CIPE), also conducted an examination of MAP-Works survey data. This study, as indicated by responses to clusters of specific questions, focused on the challenges that students may experience in adjusting to various aspects of college life and how it can affect student retention. The model developed in this report provided empirical support about the importance of CASA's role at the university. (Appendix Q: MAP-Works Retention Model).

MAP-Works survey data was also used to assess the Muscat Scholars program. Findings led to a better understanding of student expectations in the program, the perceived benefits of the program, and how MSP participants differ from other student groups. A CIPE staff member then conducted focus groups with MSP students to supplement the survey data collected (Appendix R: Muscat Scholars Program Study). The key findings of both the quantitative and qualitative data revealed that:

- MSP students indicate a higher level of commitment to stay at USF than other students.
- For most of the cohorts examined, MSP students indicated a higher level of satisfaction than other students.
- The MSP program appears to positively impact peer connections and social integration as well as satisfaction with and commitment to USF.
- The MSP program builds community and social connections that are highly valued by students.

### *ETS Success Navigator*

As of Fall 2016, due to significant technical problems with launching the MAP-Works survey platform, as well as the high cost of the product itself, the university made a decision to discontinue MAP-Works and convert to ETS's Success Navigator survey platform instead. Although narrower in its scope and more simply designed, the ETS Success Navigator assessment has similarly helped guide our outreach to first-year students who may be at risk.

We encouraged all first-year students to complete the ETS Success Navigator assessment during the third week of the Fall 2016 semester. Over 89% of the freshmen class (1425 students) completed the assessment, revealing that:

- 94% believe USF faculty and staff are concerned for their well-being.
- 89% were likely to contact their academic success coach in the future.
- 80% were already aware that they had been assigned to an academic success coach in CASA
- Of the 47% who had had contact with CASA during the first three weeks of semester prior to the survey, 69% found it helpful.
- Of the students who responded to the question *Who at USF has been the most helpful to you*, 42% said their academic success coach.
- The range of scores for sensitivity to stress, academic self-efficacy, institutional commitment and connectedness was particularly wide, indicating a need for individual attention to each student. (Appendix S: ETS Success Navigator Survey Data)

#### *Assessment of Back on Track*

In Spring 2016, we conducted a survey of Back on Track probation students (Appendix T: Back on Track Statistics and Survey Data). Some findings showed that:

- 88% of the students who attended the initial Back on Track meeting said it was *Somewhat helpful* (19%), *Helpful* (31%) or *Very helpful* (38%)
- 87% of probation students who completed the survey said the faculty mid-semester progress reports completed by faculty were either *Very helpful* (56%) or *Helpful* (31%)
- 75% of probation students said the one-on-one meeting with their academic success coach was *Very helpful*

The Spring 2016 report on the Back on Track program also included a review of retention and GPA for cohorts from 2013 to 2015. The percentage of students removed from probation (by earning a GPA of 2.0 or above) ranged from 58% to 67%, and the retention rates for this same group of students ranged from 82% to 84%. Although we do not have comparison data for probation students prior to implementation of the Back on Track program, these retention rates seem to indicate that the BOT program is successful because the rates are only slightly lower than USF's overall retention rates for those years. Still, we made some major changes to the program for Fall 2016 to increase its positive impact on this at-risk student group. We now allow ASCs to "prescribe" individualized support. For example, instead of requiring all students to attend workshops, we can refer students to tutoring, CAPS, the Writing Center or other resources that are more suited to their needs, while still meeting the requirements of the BOT program. Students are now also enrolled in a Back on Track "course" on CANVAS, the university's online course tool, and are expected to write brief reflection papers about their experiences. We are

eager to assess these newly implemented changes to the Back on Track Program and its effects on student success at the end of the semester.

#### *Assessing Communication with Students*

In order to assess CASA's email outreach efforts, we use a comprehensive communication tool (iModules) when emailing large groups of students. Our office has been commended by Web Services as excelling in our efficacy of communicating with students. Our goal is to minimize mass communications to students, so that when we send emails they are treated as important to students. We can also determine the open-rate for each email sent, and break them down by ASC caseload for additional insights. Last year, our email open-rate was almost twice that of the university, indicating we have already had considerable success.

We recently determined that students prefer to complete electronic forms as a means of providing feedback about services received. As a result, an automatic email survey mechanism will be put in place when our new Salesforce case management system is implemented.

#### *National Survey of Student Engagement*

The University also administers the National Survey of Student Engagement (NSSE) every year to freshmen and seniors. Some findings support the need for the kind of holistic advising that CASA provides. According to the USF NSSE report 2016 (Appendix U: NSSE 2016 Report), first-year students rate USF lower than other Jesuit schools in "aspects of the campus environment." The largest score differences for specific sub-topics were *interactions with other students, advisors, and faculty, providing opportunities to be involved socially, and providing for overall well-being*. Results were similar for senior students surveyed.

These "deficient" areas underscore the need for intensive intervention and retention strategies as part of an ASC's role. So, in the future, we may consider how we could use this feedback, combined with information from ETS Success Navigator and other assessments, to tailor interventions that pinpoint these specific areas and assess whether they have any impact on how students answer these questions.

#### *2014/2015 Undergraduate Advising Survey: Faculty Perceptions*

Under the umbrella of a university-wide retention and persistence committee, an Advising Subcommittee conducted two recent surveys to assess academic advising at USF (Appendix V: Advising Survey 2015). Faculty were asked to give quantitative and qualitative feedback about the advising process. The findings have implications to consider as the university further clarifies and defines CASA's role in supporting students' academic success. Some faculty stated that students appeared to be confused about CASA's role in the advising process and that they were not clear on what CASA does. These responses underscored our efforts to keep working to clarify and communicate about what we do. The chair of the Advising Subcommittee, Dr. Laleh

Shahideh, sent the subcommittee's recommendations to the Provost for review in Spring 2016 (Appendix W: Advising Subcommittee Recommendations).

**2. List the number of students using the services provided during the most recent academic year, and the Unit's role in tracking their success upon completion of the service.**

Every undergraduate student is assigned an academic success coach within CASA when they first arrive to USF, and they are encouraged to seek help from this coach at any point during their academic career. Each of our 12 academic success coaches manage an average caseload of 550 undergraduate students, and some of our associate/assistant deans currently also manage large student caseloads (between 100-300 students each). Using AdvisorTrac, our student advising notes database, we are able to track the students who visit CASA by maintaining a history of notes on who they met with, when they met, and what they met about (Appendix X: CASA Visit Statistics 2012-2016). About 18,000 student visits to CASA were recorded in AdvisorTrac in AY15 and approximately 6,000 forms were processed. This number does not include the thousands of phone calls, emails, and drop-in visits that our front desk will triage on a daily basis throughout the year, which are not recorded within AdvisorTrac.

Academic coaching was cited as the "purpose of student visit" in 96% of the student visits. Other specific visit reasons include:

- Major exploration
- Academic probation or disqualification
- Study abroad
- Leave of absence or Withdrawal filing process
- Relationships with faculty
- Academic integrity issues

Less frequent but even more critical reasons include medical or mental health issues, disciplinary action for disruptive behavior, or financial and housing concerns.

It is important to note that our reporting abilities within AdvisorTrac are extremely limited. Although we can pull numbers on the total number of visits, by coach and by student, we are unable to truly track the lifecycle of a student case, nor can we strongly measure the degree to which our efforts may have contributed to a student's success or not. We can review a history of email conversations, or notes from in-person visits, but we are not able to tie these directly to formal reports about student persistence or retention. We are restricted within AdvisorTrac to choosing only one visit reason per meeting, when we know that more often than not a student meeting will cover a large range of issues. Therefore, reporting on visit reasons has felt flat in the past and is not a true reflection of the trends, referrals, or scope of issues that CASA works with struggling students to resolve.

That said, CASA staff continue to engage in proactive outreach and efforts to track a student's success in other ways. Outside of one-on-one meetings with students, about a week into each semester, CASA staff will identify students who have not yet registered for a full-time courseload. Coaches will conduct outreach to their assigned students on this list by calling and emailing them, encouraging them to meet in person to discuss the steps that need to be taken. We track how many of these students eventually become registered full-time, and find that nearly all who intend to register full-time do so after working with CASA to solve problems such as registration holds or scheduling issues (Appendix Y: CASA Retention Strategies and Outreach Timeline).

In the middle of each semester, as part of our "Early Alert" program, CASA staff ask faculty to inform us about students struggling in their classes (performing below a C level). Faculty will then submit progress reports via an online form indicating specific challenges the student is exhibiting in the classroom; i.e. attendance, test preparation, study skills. In Fall 2012, CASA received 1,561 reports notifying us of students with difficulties in the course and in 2015, we had 1,930 of these reports (Appendix Z: Early Alert Mid Semester Progress Reports Statistics 2012-2016). This increase indicates that our efforts to encourage faculty participation have been successful, which enables us to identify many more academically at-risk students early on the semester. As we move to the Salesforce platform this Spring 2017, we hope to continue increasing faculty involvement in this CASA Early Alert program all semester, and not just during mid-semester.

In Spring 2016, 238 students were on academic probation and 408 meetings took place with their respective coaches (in many cases students met more than once with their ASC) as part of our Back on Track program. These meetings and requirements have proven to be effective tools in helping students get off academic probation.

At the end of each semester, we review the academic record of students who completed the BOT program. In Fall 2015, 16% were disqualified and 58% were completely removed from probation. In Spring 2015, the corresponding numbers were 14% and 62% respectively. Though this appears positive, it is hard to draw conclusions about program effectiveness from this data, due to the small sample size and many outside factors that may influence these rates. By implementing a structured program for students on academic probation, we support the university's commitment to academic rigor.

### **3. To what degree have you achieved Unit goals and outcomes?**

**A. Describe how data gleaned from meaningful assessments have helped the Unit improve critical processes, Unit key functions, stakeholder needs, delivery of services and identification of best practices (continuous improvement).**

As a fairly new office, it is difficult to assess the degree to which we have accomplished our overall goals of retention and contributed to four-year graduation rates (Appendix AA: Retention and Graduation Rates). We certainly believe that our services have impacted the student body and campus climate, and these beliefs are confirmed through the significant recognition that we receive from campus partners, faculty and university leadership for the compassionate work that we engage in. However, given that we are still refining our programs and services, and defining our role within the university community, we have not established formal success metrics that we can measure ourselves against. Our goal is to define internal benchmarks and establish more formal success metrics, as a result of going through the program review process this year.

Our goal of ensuring consistency and reliability in academic support services has been CASA's main focus. As a team, including our administrative staff, we are frequently updating policies and procedures in response to formal or informal feedback from students, faculty, colleagues and parents, who share their input on what we are doing well and how we can improve. We are dedicated to continuous growth by renewing our "best practices" year to year, and have made a lot of progress in improving our services in response to student needs as a result.

Throughout the semester we will often share case studies in our staff meetings as a way of openly discussing response protocol. In these exercises, we will break down the various elements of the case and discuss with one another what the appropriate next steps would be, who to get involved, and what resources the student should be made aware of. As a result, a 'CASA Response Checklist for Common Student Cases' was created to ensure that, internally, all academic success coaches were thinking about the same set questions and responding to certain student scenarios in the same way. (Appendix BB: CASA Response Checklist) Although we understand that each student may present a different set of variables to any given situation, this reference document has helped to standardize some of our procedures, outreach, and delivery of support services.

In addition to maximizing opportunities for efficiencies, we are constantly exploring ways to improve our training and onboarding practices with new staff. In the last year, we have developed a comprehensive checklist of items or training sessions that new employees need to complete (Appendix CC: New Hire Onboarding Checklist). After reading our robust policy and procedures manual about CASA's internal operations, academic success coaches are invited to shadow colleagues during residence hall drop-in hours, important student meetings, and committee discussions. Their learning is put into practice almost immediately, as they are introduced to our campus partners and integrated into the community to understand the co-dependent relationships we have with other departments (Appendix DD: CASA Sample Training Agenda).

As our goals evolve, we look forward to defining our objectives further and implementing new assessment tools that will help us to measure success across different categories.

**B. Describe how data collected are used to inform and support other Academic and Non-Academic Units in the Institution**

CASA staff consistently review trends by counting the number of forms processed, the number of students seen for certain issues, or the increased number of referrals to/from a specific department. In performing “triage” functions at the front desk, our staff can detect patterns indicating potential problems. For example, if a number of students are unable to register for certain classes due to restrictions that do not appear to be intended, CASA staff will immediately follow up with the appropriate college or department to help resolve the problem promptly.

**C. Describe how staff/administrator in the Unit analyzes trends of Unit productivity (e.g., students serviced, tracking student success in academic programs, etc.**

At this point, we have little data linking our services to retention, graduation, grades or other quantifiable variables, but we hope to conduct further research across all of CASA’s services and how they impact students, in order to inform the university community and broader stakeholders. Fortunately some college-administered and university-wide assessments regularly provide findings that relate to CASA services and student needs. Some of these include the annual National Survey of Student Engagement (NSSE), the annual pre-graduation survey for seniors, and periodic advising surveys.

That said, we rely on the Advisortrac (AT) system to track student visits, emails, notes and reasons for why the students came to CASA. While AT is essential to our daily work, it does not link with our many other university data systems, limiting our ability to assess productivity in a meaningful way. We are currently in the process of implementing a new custom Salesforce data management system that will enable us to better and more accurately track student success and the numbers of students served. Not only will the new data system provide greater flexibility, it will also allow for better reporting capabilities regarding student success, outreach response and case resolution, success indicators, and trends, year over year.

**D. Describe changes made to the Administrative/Services Unit using evaluation/assessment data.**

We learn a lot about our students’ needs by collecting data on CASA’s services through Advisortrac and intra-office communication. We also use information about students’ day-to-day experiences to develop or improve administrative processes. Thus, our administrative systems

are constantly evolving as we observe and talk with students and learn how to better foster their development and academic success.

We also use student feedback and CASA staff members' observations to regularly review and update our policies and procedures manual. By incorporating better methods of handling student situations, we improve CASA services and provide more up-to-date guidelines for CASA staff. This, in turn, ensures more consistency among CASA staff practices and helps us train new staff members.

The creation of the Explore Your Path website is an example of a program designed to meet a specific student need. An informal student survey found that 40% of USF students change their majors at least once before obtaining a USF degree. CASA staff had observed through extensive experience working with these students that they needed more help in choosing majors and developing career plans that were well-suited to their interests, skills and values. With this need in mind, we developed a website that guides students through the different developmental phases of the career exploration process ([usfca.edu/explore-your-path](http://usfca.edu/explore-your-path)). The site includes videos of students telling their major exploration stories and describing how academic success coaches helped them identify the major that was right for them. We plan to continue using website analytics data to track traffic and activity on the site and conduct focus groups with students to enhance user experience.

Similar examples of programs developed in response to documented or observed needs include:

- Assisting in the transferring of advising functions to the School of Management staff and faculty in order to provide more consistency in how advising services are delivered across the university.
- Initiating a new practice of reviewing degree evaluations for all new transfer students in the School of Management, then reaching out to students *prior to enrollment* to proactively resolve common problems such as missing transcripts or course substitution evaluations.
- Continually working to clarify the perception of CASA's role by students and faculty.
- Enhancing training practices and establishing more clear policies and procedures for academic success coaches.
- Having academic success coaches present basic registration, advising and degree evaluation information to students enrolled in each section of USF 101.
- Helping students establish a *TransferNation* student organization to help address the lack of a transfer student community.
- Using CANVAS (the university's online learning platform) to implement a system to track probation students and monitor student progress in completing the Back on Track program requirements.

- Expanding the options and adding customized interventions for students completing the Back on Track program requirements, so that academic success coaches can tailor to specific student needs.
- Working with the Learning Center staff to expand the Project Success program to provide intensive study-skills support to students, as recommended by coaches.
- Hiring a new Spanish-speaking staff member with extensive experience in building culture-based communities for students, particularly first generation.

#### **4. What factors have facilitated or impeded the Unit's ability to meet its goals and outcomes?**

The biggest impediment to accomplishing our primary goal is the lack of data to inform decisions about our services. We require more information to better understand the link between services we provide and how they impact students. We do not have an overall view of how well we are achieving our goals, or what specific outreach methods, service components or programs, have resulted in success.

One challenge we are working to address is the fact that students do not have a clear, consistent way of communicating with us about their CASA experiences. Currently, we have a haphazard qualitative system that relies on students to spontaneously express their views to CASA staff. The students who share their views are hardly a representative sample. They tend to either be outgoing students who share positive feedback, or students who do not hold back in expressing even the slightest negative comments. It is important for us to have a more comprehensive and reliable avenue for collecting all student opinions about our services, or at least a random sample from the entire student body.

Thinking ahead to ways that we can optimize the Salesforce case management system that we are implementing, we plan to utilize the platform's reporting functionality to help us integrate quantitative data sets and generate a variety of customized data reports. We plan to use this robust information to more thoroughly and accurately evaluate our effectiveness in meeting our goals and outcomes, and engage in targeted outreach with different student populations who meet various criteria.

#### **5. How do faculty/staff roles support the Unit's delivery of services? Gaps?**

This fall, a group of faculty from the School of Management began advising their own students for the first time, relieving CASA of this responsibility. To aid in the transition, CASA staff who are experienced in academic advising were utilized to help train faculty academic advisors throughout the semester. While CASA staff can now focus on their success coach roles, some

academic success coaches will continue to provide advising support to a small population of SOM transfer students until the transition is complete.

From the very beginning, CASA staff and faculty have worked closely together to help support students. We depend on faculty to make referrals whenever students are struggling, either academically or personally. On a daily basis, we hear about students' difficulties in particular classes, whether it's due to an extended absence, trouble understanding assignments, or a learning style issue. Academic success coaches confer with faculty to clarify expectations, figure out how to best coach and support a student, or determine a student's ability to succeed in the class. In turn, we also support faculty by taking away non-academic advising responsibilities.

In addition to less-formal types of contact like phone calls and emails, faculty have been increasingly participating in our Early Alert program by sending notifications about students who are at risk of getting low grades in their courses. Although we have required probation students to ask faculty for regular progress reports for some time, faculty are not required to let us know about every student who is not passing. With faculty support in providing this information to us, it has helped us to detect problems early on and perform outreach to intervene with these students. This system works well because failure in one class often indicates that a student has challenges beyond just their academic performance in that class. Although many students may just need help with skill-building, faculty referrals and Early Alerts help us detect students who are experiencing health problems, depression or anxiety, homesickness, substance abuse, or relationship problems. Outreach from USF 101 and first-year seminar professors has also helped us to strengthen these relationships and target students in need of the most help from CASA. In fact, most USF 101 professors bring their students on a tour of CASA early in the semester, and then ask that one of our ASCs follow up with a presentation to their class about our services.

Faculty advisers are also often the first to assess students' ability to succeed in their chosen major. The earlier we can raise the major-fit question with students, the more likely they are to succeed in a new major without wasting time and money. Some departments such as Psychology, Biology and Accounting have policies that help us discern who the students are that need "major interventions." We recently began comprehensive outreach to faculty about our Explore Your Path major exploration portal, focusing on first and second-year students. We have had about 300 students use our site since it launched, and we expect this number to jump in the weeks before registration, and then again after students receive their fall semester grades.

As discussed earlier, CASA's work involves constant collaboration with staff members across campus. On the whole, staff are very supportive and eager to refer students as needed, or to have us refer students to them. This "symbiosis" is critical to CASA's role in supporting students.

## GUIDE FOR THE FUTURE

### **1. What are the Unit's strengths? What examples of long-term excellence, recent accomplishment, or improvement characterize the Unit's recent history? In what ways could the Unit be considered a leader in its field?**

#### *Cura Personalis*

CASA's key strengths are its staff members who are committed to the university's core values and to the holistic development of our students. As highly trained student services professionals who act as "generalists" with a wide range of skillsets, we are uniquely qualified to put the Ignatian-Jesuit characteristic of *cura personalis* into action by assisting students' personal growth holistically rather than focusing on just one aspect such as academic excellence. CASA provides student-centered academic coaching that is tailored to meet the specific needs of each individual. Rooted in shared core values, both within the division and the university at large, CASA is central to the university's retention efforts. Without CASA's support of all academically at-risk students, as well as of average-to-high-academic performers, who need help integrating with the USF community and clarifying and achieving their personal and academic goals, USF would have no comprehensive mechanism for retaining the extremely diverse student population that we are so dedicated to serving.

#### *Collaborations*

In the four years since our opening, CASA has become a campus hub for students as well as faculty and staff. We have devoted time to building interdepartmental relationships, not only inside Student Life division, but with other colleges and administration offices. Through presentations around USF, and actively seeking opportunities to collaborate across departments, we have worked to increase CASA's campus visibility and have now become an essential resource to students, faculty and staff. CASA is known for its prompt responses to inquiries and student referrals from faculty, staff and family members, and is recognized as a safety net for students.

#### *Human Capital*

CASA is composed of a dynamic, strong team of individuals united by common values and commitment to service and also by our own diverse array of strengths. Each staff member has specific areas of expertise that we regularly share, creating a culture of regular cross-training as well as mutual support. Our commitment to knowledge-sharing allows coaches to continually develop as professionals and to provide the best possible support to a wider range of students. Our disparate and complementary experiences have contributed to our ability to create home-grown programming (such as Explore Your Path Portal, TransferNation, and PACT) that supports our mission. We are open to outside ideas, embrace change, and frequently engage in reflection that allows us to adjust and grow organically.

**2. What are the Unit's weaknesses? Where could the Unit improve most? What challenges or obstacles make it difficult to overcome these weaknesses? What further challenges does the faculty foresee in the coming years?**

*Reporting Structure*

One area that needs to be addressed is CASA's reporting structure. We do not have a direct reporting line to the provost's office, which we view as essential in our role as an academic support services unit. CASA is currently housed under Student Life, but the support and coaching we provide is more closely aligned with **Academic Affairs** in the Schools and Colleges. Currently, there are still a lot of differences between how the colleges and departments operate, and CASA staff are often not able to assist students in an effective manner, which defeats our purpose to administer consistent university policies and procedures. If positioned within the Academic Affairs office we would, ideally, be included in decision-making when the issues directly impact CASA. Having this direct reporting structure to the provost would aid with faculty buy-in and collaboration with CASA. It would also lead to closer collaboration between CASA and the administration, as well as more informed decision-making regarding policy, procedures, and necessary improvements in case management (Appendix EE: Proposed Reporting Structure).

*Navigating Systems*

Currently, CASA staff use many different technical tools and software platforms to accomplish their daily work. Student data is housed on a university-wide Banner system that requires back and forth navigation and interaction with numerous other systems for simple pieces of student information needed. For example, Self-Service Banner provides access to student information and records; Internet Native Banner is the only place to check for FERPA release; meeting notes are stored in AdvisorTrac; forms and documents are saved in Extender; degree projections are viewed with DegreeWorks, and email campaigns are delivered through iModules. Having to navigate between so many systems in order to have a full picture of the students we are working with is unwieldy, time-consuming and inefficient. As a result, we are purposely building our case management system via Salesforce in such a way that will enhance our ability to serve students at a greater capacity in a smarter, more efficient and streamlined manner.

*Academic Success Coaches' Caseload Size*

It is always a struggle to secure the resources, budget, and staff necessary to serve the community of students and faculty at USF. According to the NACADA 2011 National Survey of Academic Advising (Carlstrom, 2013), the median caseload of advisees per full-time professional academic advisor is at a ratio of 296:1. By institutional size, the median individual advisor caseloads are 233, 333, and 600 advisees for small (<5,000), **medium (5,000-15,000)**, and large (>15,000 students) institutions, respectively. Currently, CASA's academic success

coaches average **550** students per caseload, which is due to the larger-than-average incoming class of 1,900 students (in Fall 2016). *Although CASA coaches are not academic advisers*, we believe that the type of support we offer is much more comprehensive than the academic curriculum advising that faculty provide; therefore, our caseloads should be more aligned with those of professional academic advisers at medium-sized private colleges. The budget and staffing should reflect the growth and changing needs of the student body.

### *Retention*

Often times, the university's focus on retention numbers can be a source of conflict for CASA staff. For example, there are cases where despite our best efforts, it is not in a student's best interest to remain at USF due to personal, financial, or other reasons. In our duty to support the holistic growth of students and keeping their best interest and welfare in mind, we may not always be in a position to retain these students. In these difficult situations, we prefer and encourage students to discontinue their education at USF once we recognize that they will not be successful here. Although CASA remains deeply rooted in its mission, we hope that the University can recognize that the work that we do clearly impacts student retention, even when this impact is not always reflected in overall retention rates.

### *Perceptions of CASA*

Another area that can be improved is the definition of what role ASCs play in academics and what issues we are positioned to help with. Rather than becoming a dumping ground for issues unable to be addressed by faculty or other staff, we need to work on a more concrete and universal definition of CASA's role as it relates to students and the rest of the community. Currently, faculty approach us in different ways or have different expectations regarding our work together in supporting a student, and many do not know or want to collaborate with us at all. As new staff and faculty are hired, both full-time and adjunct, we need to engage in increased cross-training with other academic departments/schools in order to facilitate greater collaboration and improve the perceptions around our different roles and responsibilities. This also applies to Admissions and other non-academic campus offices.

### *Assessment*

We need to increase how we utilize student and organizational data to base our decisions about the services and programs we provide. We also need to clarify CASA's student learning outcomes/objectives and how we will assess them. Currently, we lack adequate assessment methods for gathering data to inform our decisions. It would be important for us to set internal operational benchmarks for service; for example, how many students we would like to connect with each week/month/semester/year, in order to implement "quality control". We would benefit from providing students an avenue to share real-time feedback about their experiences with their ASC/Dean/front desk, etc. after each meeting. It would also be helpful to track the impact of our relationships with faculty and staff. In order to better understand how CASA has had an effect on

student success, we would need comparison data from pre- and post-CASA implementation; but we don't currently have a mechanism to obtain this data. Thus, the absence of data or the means to obtain it restrains our ability to reflect on performance and make improvements and adjustments.

### *Physical Space/Work Environment*

As CASA continues to expand in staff size to meet the growing student population, then so must our physical office space. Unfortunately, our current space is no longer large enough to accommodate our entire staff, with four coaches residing in offices located outside of the CASA main area (previously, these offices were small conference rooms for students). Also, the layout of our confined spaces is not conducive to the relationship-building that is critical to the work we do. Our offices are currently designed in such a way to support independent desk work with our backs turned to the doors, rather than in an inviting layout where face-to-face conversations can take place without having to maneuver furniture around. In an ideal re-design, we would also ask for a space that provides windows and sunlight, or at least some form of ventilation/cooling so that doors can be closed for private conversations.

### **3. What changes have occurred in administrative processes and/or services provided over the past five years that have influenced the Unit's view of its role in the University and the field?**

To ensure that policy and procedures are reviewed and updated on a regular basis, CASA formed 10 internal committees responsible for different functional areas. As a group, CASA staff review the strategic goals agreed upon in the previous year, at least twice per year, which allows us to grow internally and purposefully. Outside of CASA, staff involvement in the USF community has also increased; with many ASCs representing CASA on multiple external committees that work diligently to increase visibility with other departments at USF. As a result, we have seen an increase in consultations and recognition from other departments.

Since 2012, CASA has also added, redesigned or expanded many programs and services, including:

- PACT,
- TransferNation (student group),
- International Student Retreat,
- College Success Courses,
- Peak Performance Sessions (formerly Student Success workshops),
- Explore Your Path student portal

We also created curriculum materials for USF 101 and BUS 100 courses, took on responsibilities for Athletic advising, and created avenues for staff development and team building. We have

implemented and reevaluated first-year student survey tools, from MAP-Works to ETS Success Navigator, in an effort to continuously improve our connections with students struggling with their transition to university life.

In response to a growing need for an efficient system that helps academic success coaches manage their student case/workloads, CASA was fortunate enough to receive funding through the president to invest in a Salesforce technology project. Over the last two years, we have dedicated a small team within CASA to work directly with ITS in building a custom case management system that utilizes the Salesforce higher education (HEDA) software platform. This project has grown from the initial threads of an idea to a fully functional database that will house all of the information our office requires to monitor and respond to our students. Business processes were analyzed, use cases were written, workflows charted, and software functional requirements were documented along the way. Additionally, this project has had the challenge of fulfilling the need to have a single 360 degree view of student activity through the integration of data from multiple sources (i.e. Google, Banner, AdvisorTrac, survey results, etc.).

Salesforce implementation plans include the ‘sunsetting’ of AdvisorTrac, and adoption of a new Early Alert online portal where faculty can submit student progress reports that will be logged directly in tandem with our own student outreach notes. Students will also have access to a custom appointment portal, to facilitate efficiency in requesting appointments to connect with their academic success coaches. Overall, our internal case management committee has spent hundreds of hours meeting with ITS, the implementation team at DeLoitte Digital, and internally to develop an agile, well-designed, comprehensive, intuitive, and holistic system that meets the needs of CASA staff and our collaborative partners. This platform will be known as Salesforce Student and is slated to launch in January 2017.

One final significant area of focus over the past five years has been the evaluation and implementation of changes to the Back on Track probation program. Frequent assessments of the impact that the BOT program has on students each semester have helped us develop a more flexible program that allows for coaches to offer an extensive list of projects and programs to students based on their individual strengths and challenges.

CASA’s work to standardize, integrate, and clarify academic policies and procedures that critically affect students, has helped strengthen the university’s student support infrastructure. From a student perspective, we are now less of a conglomeration of colleges and independent departments, and more of a university with a standardized academic and holistic support system. These strengths have helped contribute to USF’s growth and enhanced reputation in the external community and to prospective families.

## PLANS FOR THE FUTURE

### **1. Describe where the staff would like the Unit to go in terms of services, performance standards, collaboration with other units, synergies, etc.**

#### *Assessment*

As described earlier, CASA's most critical "call to action" involves developing formal assessment systems to better inform our decision-making. To determine the impact of CASA services on retention and graduation rates, and better understand student needs, we plan to develop and implement effective assessment measures and benchmarks. Within the next four years, we intend to have much more extensive and relevant data that we can use to demonstrate our impact on the USF student population and larger community. We also expect to use data to illustrate how and why we made changes to our services. Specific assessment projects in the queue include:

- A system for acquiring student feedback about experiences with CASA.
- A comparison study of retention and graduation rates and other variables before and after CASA existed.
- An investigation of how CASA services impact students' day-to-day lives and perceptions about their college experience.
- Research on how CASA has impacted faculty teaching and advising roles.
- Inquiries related to CASA's possible impact on grades, course withdrawal/completion rates and other indicators of academic success and persistence; especially with academic probation and other at-risk students.
- An examination of the relationship between various outreach and communication strategies and CASA student visits.
- A study of factors contributing to a student's choice to visit CASA.
- A thorough look at student, faculty and student perceptions about CASA's role and efficacy.

#### *Continued Professional Development and Cross-Training*

We intend to continue training CASA staff to meet ever-changing student needs. We hope to keep abreast of nationwide trends and developments in best practices. Internally, we must also continue close collaboration and cross-training with departments across campus including Student Disability Services, the Center for Global Education, Admissions, Counseling and Psychological Services, Financial Aid/One Stop and the Learning and Writing Center. Our students are shaped by these offices' services and expect us to help them resolve (or prevent) related problems, so the more we know the better able we are to serve students and the USF community.

### *Improved Collaboration with Faculty*

We plan to continue to clarify and distinguish between roles of faculty advisors and ASCs. With support from USF higher administrators we hope to develop consistent policies and procedures related to these roles (i.e. who does what). We know that the Early Alert system has had a direct positive impact on student academic achievement because it allows coaches to conduct timely outreach and referrals to prevent academic failure. Therefore, we would like to increase participation and aim for 100% completion rate by faculty who submit Early Alert progress reports for all undergraduate students struggling in their courses.

### *Case Management Enterprise*

Salesforce Student is the first USF project of its kind to launch with custom integration of student information. The system was designed with an eye towards expansion in gaining a 360 degree student view, knowing that when budget and time allowed, additional University constituents could utilize the existing foundation and expand on it based on their own unique business needs. The inclusion of faculty and students on a Salesforce platform designed for their advising, academic, and personal needs is integral to the university goal of seamless communication between all University constituents. The creation of an enterprise platform built on Salesforce directly “promotes close student-faculty relationships and effective mentoring/advising by faculty and staff on the personal and professional development of students” (USF 2028 Planning Document).

Currently, Salesforce Student manages information from faculty and students via custom designed portals for communication. The next phase of moving toward an enterprise model on the Salesforce platform would include integrating faculty and student advising notes and communications. This could begin as early as June 2017 during the Webtrack advising and registration period. This unified platform creates clear lines of communication between all academic-focused entities at USF, thus empowering students to monitor their individual student success in real-time.

### *Internal Administrative Improvements*

CASA will continue to improve our student services by striving to increase efficiency, and effectiveness, distribute workloads equitably, and maintain a cohesive, diverse and cooperative team.

## **2. Describe where is the field going based on the literature, professional association meetings, etc. and how the Unit is ready to address those challenges and improvements.**

CASA staff stay informed of advising and coaching topics by attending professional development conferences such as NACADA, (The Global Community for Academic Advising), ACPA, (American College Personnel Administration), NASPA, (National Association of

Student Personnel Administrators), JASPA, (Jesuit Association of Student Personnel Administrators), and ACA (American Counseling Association), as well as reading journal articles, watching TED talks, and reading books. Academic coaching/advising topics that have been very critical to the profession are: resiliency, appreciative advising, supporting the first-generation student population, mentoring underrepresented students, and data-driven student interventions. CASA staff have developed programs that address the aforementioned topics and are described below.

## **Current Topics in Advising/Coaching Field**

**Resiliency** - CASA has adapted the resiliency concept within the Back on Track academic probation program, by having students review TED talks and other resiliency resources listed below. These resources are listed on our Canvas site for supporting our students on academic probation. Staff are also coached on how to utilize these concepts when working with students who may be having a difficult time.

### **Resiliency Resources**

- **Carol Dweck, Growth Mindset**  
([https://www.ted.com/talks/carol\\_dweck\\_the\\_power\\_of\\_believing\\_that\\_you\\_can\\_improve?language=en](https://www.ted.com/talks/carol_dweck_the_power_of_believing_that_you_can_improve?language=en))
- **Angela Lee Duckworth, *Grit***([https://www.ted.com/talks/angela\\_lee\\_duckworth\\_the\\_key\\_to\\_success\\_grit?language=en](https://www.ted.com/talks/angela_lee_duckworth_the_key_to_success_grit?language=en))
- **Kate McGonigal, *Stress***  
([https://www.ted.com/talks/kelly\\_mcgonigal\\_how\\_to\\_make\\_stress\\_your\\_friend?language=en](https://www.ted.com/talks/kelly_mcgonigal_how_to_make_stress_your_friend?language=en))
- **Alison Ledgerwood, *Positive Thinking***  
(<https://www.youtube.com/watch?v=7XFLTDQ4JMk>)
- **Sophie Scott, *Laughter and Connection***  
([https://www.ted.com/talks/sophie\\_scott\\_why\\_we\\_laugh?language=en](https://www.ted.com/talks/sophie_scott_why_we_laugh?language=en))
- **Stanford Resilience Project (Stories of Resiliency)**  
(<https://undergrad.stanford.edu/resilience>)
- **Reflections on Rejections**  
(<http://successfailureproject.bsc.harvard.edu/reflections-rejections>)
- **Abigail Lipson, *How to Have a Really Successful Failure***  
([http://bsc.harvard.edu/files/bsc/files/bsc\\_pub\\_-\\_how\\_to\\_have\\_a\\_really\\_successful\\_failure.pdf](http://bsc.harvard.edu/files/bsc/files/bsc_pub_-_how_to_have_a_really_successful_failure.pdf))
- **Nan Henderson, *The Resiliency Workbook: Bounce Back Stronger, Smarter & With Real Self-Esteem***

(<http://www.amazon.com/The-Resiliency-Workbook-Stronger-Self-Esteem/dp/0966939484>)

- **Christian Moore, *The Resilience Breakthrough: 27 Tools for Turning Adversity into Action***

(<http://www.amazon.com/The-Resilience-Breakthrough-Turning-Adversity/dp/1626340935>)

### **Appreciative Advising**

Journal articles written by Dr. Jennifer Bloom have helped to shape our Academic Action Plan for students on academic probation. Also, how we approach and advise students uses elements from the model of appreciative advising.

Appreciative Advising link: <http://www.appreciativeadvising.net/about-us.html>

### **StrengthsFinder/StrengthsQuest**

A few years ago, two of our staff became certified as strength-based facilitators for the StrengthsQuest assessment program. As an internal exercise, the entire CASA team completed the assessment and participated in a retreat to discuss how we can work as a team and maximize our unique strengths. We also use these concepts when meeting with students - as we empower them to develop and utilize their own strengths. Additionally, the Strengthsfinder Assessment is given to all incoming MSP Scholars, staff, faculty, and advisory board members. Focused on discovering their talents and strengths, the Strengthsfinder Assessment allows us to identify how we can capitalize on our strengths to be successful in and outside of the classroom.

<http://www.strengthsquest.com/home.aspx>

### **First-Generation Support Program - Muscat Scholars Program**

As mentioned, the Muscat Scholars Program is a transition program for first generation, first year college students at USF who would benefit from an academic and social preview to the university. Starting two weeks before Orientation, the admitted group of Muscat Scholars move onto campus, are assigned mentors, and take classes that will help ease the transition into the first year. The program continues during the school year with retreats, monthly dinners, and optional excursions. The students also take MSP-specific courses together, Psychology of Success and Exploring Majors and Careers, serving as an opportunity to prepare them for the academic rigors ahead.

### **Books:**

Boyle, G. (2010). *Tattoos on the heart: The power of boundless compassion*. New York, NY: Free Press.

Delpit, L. D. (2006). *Other people's children: Cultural conflict in the classroom*. New York: New Press.

Duhigg, Charles. (2012) *The power of habit :why we do what we do in life and business* New York : Random House.

Dweck, C. S. (2006). *Mindset: The new psychology of success*. New York: Random House.

Rath, T. (2007). *Strengths finder 2.0*. New York: Gallup Press.

Rath, T., & Conchie, B. (2008). *Strengths based leadership: Great leaders, teams, and why people follow*.

Waitley, D. (2008). *Psychology of success*. Columbus, OH: McGraw Hill.

### **Articles:**

Delpit, L. (1988). The silenced dialogue: Power and pedagogy in educating other people's children. *Harvard Educational Review: August 1988 (58)3. p 280*.

McIntosh, P. (1989) White privilege: Unpacking the invisible knapsack. *Peace and Freedom Magazine, July-August, 1989*, pp. 10-12.

Yosso, T. (2005) *Whose Culture Has Capital? A Critical Race Theory Discussion of Community Cultural Wealth*. *Race, Ethnicity and Education (Vol 1,1)*. p69-91.

### **Mentoring Underrepresented Students**

One of our staff members attended the Summit on Educational Excellence in October 2016 held in Atlanta, GA at Morehouse College. This event was a partnership between The White House Initiative on Educational Excellence on African Americans and Johnson Publishing/Ebony Magazine. Additionally, CASA staff attended the National Conference on Race and Ethnicity (NCORE) where they obtained best practices and structural advice to grow the PACT program which serves undergraduate men of color.

### **Data Driven Student Intervention**

CASA has spent the last four years collecting data through non-cognitive student assessment instruments from both EBI MAP-Works and ETS Success Navigator. After receiving these comprehensive student reports, our staff worked with the residence halls to create student interventions.

*Planning and Assessment in Higher Education: Demonstrating Institutional Effectiveness*. (2010). Book by Michael F. Middaugh. Review by Jamie Reynolds.

### **Case Management System Approach to Advising**

The article below talks about how the Case Management Society of America describes case management, which is the approach that CASA staff have taken toward academic coaching. The case management approach is described as “a collaborative process of assessment, planning,

facilitation, care coordination, evaluation, and advocacy for options and services to meet an individual's needs through communication and available resources (Case Management Society of America)".

How CASA staff utilize this approach is by using different resources in order to complete targeted outreach to specific student populations such as: students on academic probation, first-year students, and students earning below a C grade. With these different student populations, we make referrals to campus resources, collaborate with students in creating student success plans, and maintain advising/coaching notes in a new system specifically created for our case management style of coaching. CASA staff also engage in significant advocacy between students and faculty regarding different academic challenges. These practices will evolve greatly once the new Salesforce case management software is in place.

<https://www.nacada.ksu.edu/Resources/Academic-Advising-Today/View-Articles/The-Case-for-a-Case-Management-Approach-in-Advising-Academically-Underprepared-Students.aspx>