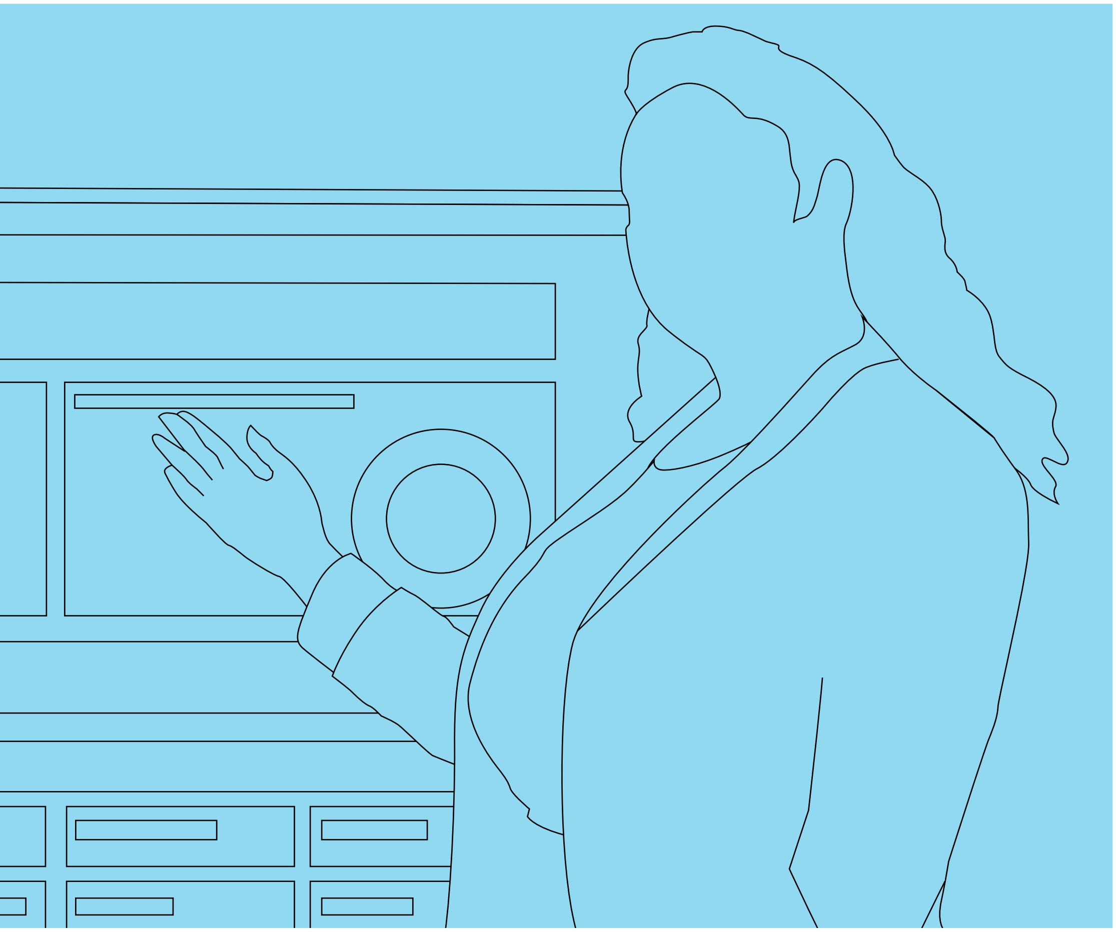
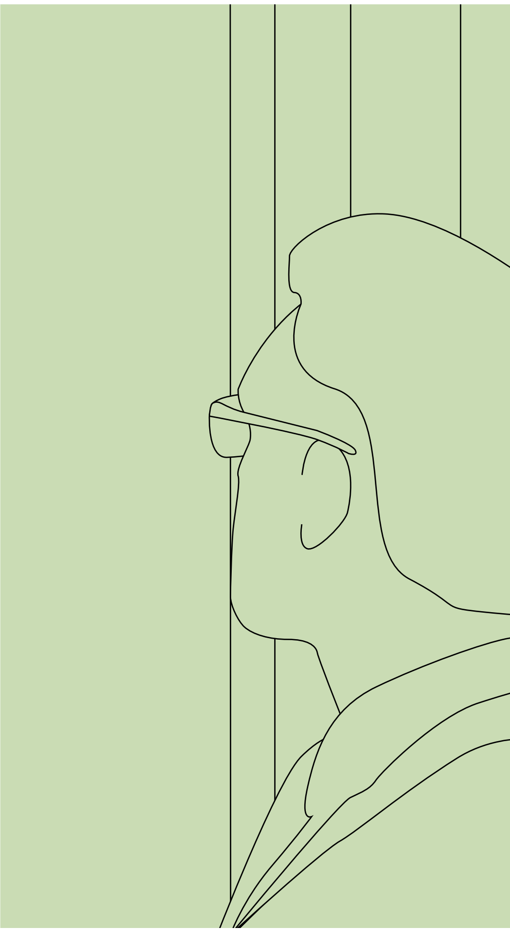




Software Selection Guide:
Student Success Tools and Services

CIVITAS® LEARNING

Introduction

Improving student outcomes: A guide to help higher education leaders navigate the technology buying process

Improving student success is everyone's responsibility. But in many cases, the pursuit of improved student success feels like driving down a dead–end road, revealing inefficiencies in cross–functional workflows and exposing the constraints of a traditional operating model along the way. With more diverse student populations, more alternatives to postsecondary education, greater financial burden and shifting labor market demands, higher education institutions are struggling to keep up with the unprecedented rate of change.

Overcoming these challenges seems to demand far more resources than teams have available and, as a result, leads to a growing Student Impact Gap – the delta between desired student impact and what outcomes institutions are actually able to achieve .

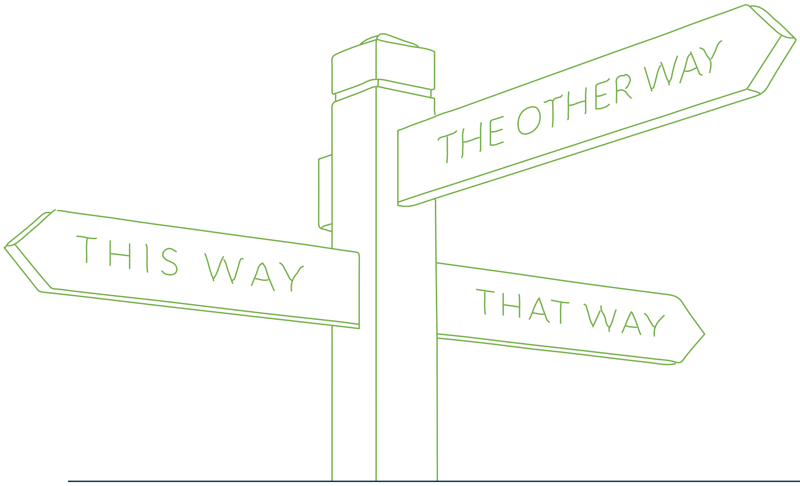
Maybe you find yourself struggling to allocate resources without a clear sense of which programs and policies are actually helping students, or wasting another afternoon sifting through disparate data from various groups to pinpoint the root cause of last term's drop in re–enrollment.

What could you do differently if you had a comprehensive view of your students, programs, and processes?

Transformational higher education leaders are turning to data–activated Student Impact Strategies to improve student retention, persistence and completion while reducing inefficiencies and protecting resources.

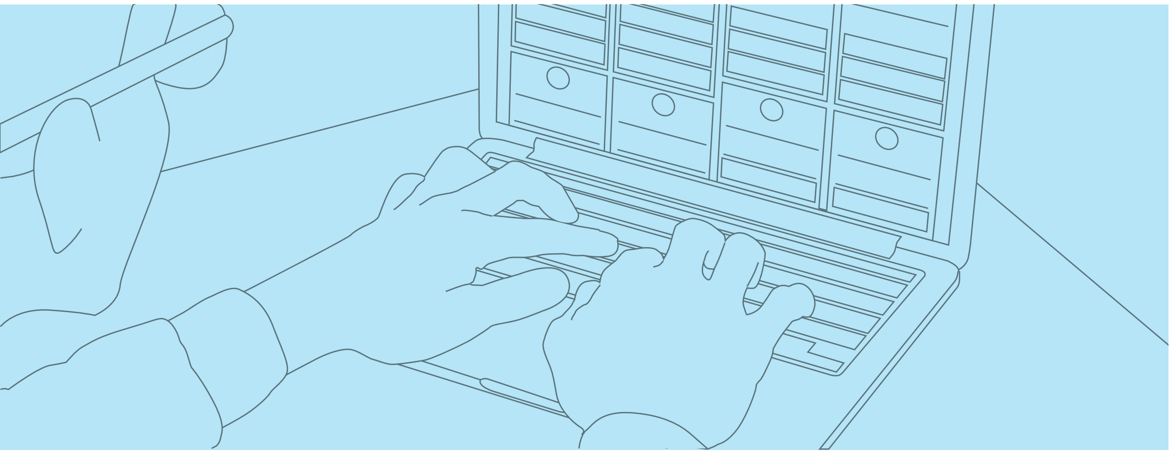
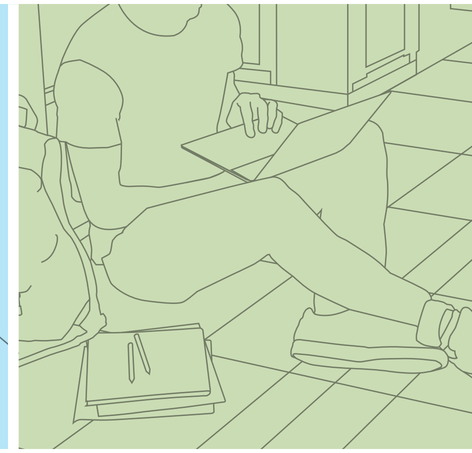
But they're not doing it alone. Student success technologies can help provide a more complete picture of what impacts student success, plus the information and tools you need to take precise action. Student success tools alone won't close the Student Impact Gap at your institution, but a carefully selected technology partner will act as your co–pilot on the road to improved student success.

If you're researching what's possible or planning to invest in student success technology, this guide can help you prepare for and navigate the technology buying process.



THIS GUIDE WILL HELP YOU:

1. *Align Internally on Your Foundational Student Success Goals*
2. *Identify Important Considerations and Questions to Guide Your Vendor Search*
3. *Navigate the evaluation process to select the right technology*

Step 1:
Align on Student Success Goals

First, let's consider what it means to implement a *Student Impact Strategy* with these guiding principles:

1. *Unify disparate data in a cost–effective manner to see the bigger picture*
2. *Put specialized data science to work with continuous analysis and data–driven guidance*
3. *Better predict student outcomes with the ability to model each individual student with precision*
4. *Uncover barriers and risks – faster and with precise clarity*
5. *Stay one step ahead to intervene before it's too late*
6. *Optimize initiatives, policies and programs and know where to invest with certainty*
7. *Continuously recalibrate to optimize and refine programs, policies and initiatives*

With this in mind, you're ready to align on your institutional student success goals. Taking the time to understand priorities up front can help ensure there's a focused, objective plan before jumping ahead in your search.

This means coordinating cross-functionally and beyond the buying committee to define a list of your institution's core goals and priorities when it comes to measuring and improving student success.

This list of priorities will help you narrow down your technology requirements in the next step. Some questions you may want to ask include:

- ✓ *How do we currently define student success?*
- ✓ *What challenges are we currently facing when it comes to student success and outcomes?*
- ✓ *What kinds of student information are we currently capturing?*
- ✓ *What other information would we like to capture?*
- ✓ *How easy is it to share information with different departments or areas on campus?*
- ✓ *How do administrators consolidate data across campus?*
- ✓ *How do advisors currently manage their day?*
- ✓ *What does each department need in order to do their daily work more efficiently?*
- ✓ *What resources do students have to manage their schedule and plan for graduation?*
- ✓ *Do we know how effective our programs or initiatives are for specific groups of students?*
- ✓ *How often should we be assessing ROI?*

To make sure you're selecting a solution designed to support leaders, faculty, advisors, and students, review the following concepts as a team, and consider their order of priority:

Comprehensive Analytics and Trusted Insights Surfaced in One Place

Your student data – including activity, engagement, demographic, academic, financial data – is transformed into precise, actionable insights, updated in real-time, and delivered to the people who need it urgently.

Efficacy Data to Make Informed Decisions and Investments

You have what you need to determine the effectiveness of student success policies and programs so that you can maximize the ROI and scale the impact.

Improved Data Governance and Culture

Student data is accessible to the teams that need it with the context and tools to sustain a data-informed culture.

Increased Collaboration Between Advisors, Faculty, and Staff

Your student support network has the context and workflow tools they need to find efficiencies and create space for more individualized and proactive action.

Guided Adoption Strategies and Collaborative Support

Your software is supported by a team of higher ed experts who work alongside you to drive adoption and create tailored success plans for maximum impact.

Step 2:
Determine Required Capabilities

Now that you've taken the time to align internally on student success goals and priorities, you're ready to start building a list of required capabilities. Remember to keep each team's use cases and current pain points in mind as you narrow down the list of capabilities required to achieve your institution's goals.

Establish a comprehensive and institution–specific analytics platform

Scale and continuous improvement require a comprehensive, institution–specific analytics platform in place. The key to an effective student success tool is an established infrastructure that can democratize your data and allow it to be shared throughout your institution via role-specific dashboards and functionality – creating a foundation that can adapt and grow as your students and institution change. Having a platform that is able to evolve and demonstrate flexibility as the term progresses is vital to long–term results.

New America published a guide supporting this criteria, and shared their views on ensuring data and tools are flexible and fit the need in their *Choosing a Predictive Analytics Vendor Guide.*

It is important to understand how the platform is built and maintained, as well as standards for security and privacy. Here are some criteria to consider:

- ✓ *What are the primary data sources for the platform and how frequently is each source updated?*
- ✓ *What other optional data sources can be included?*
- ✓ *How do you maintain the accuracy of data models?*
- ✓ *Does the solution produce visualizations of predictive data and other insights?*
- ✓ *How does the organization provide visibility into the modeling and predictions?*
- ✓ *How is LMS or other engagement data leveraged in the platform?*
- ✓ *How flexible is the solution to allow for an institution–focused approach to accommodate current functionality needs while allowing for expanded future use to meet new goals and requirements?*
- ✓ *Does the solution allow for the inclusion of custom capabilities to meet our institutional needs and workflow?*
- ✓ *Can they provide evidence of a SOC 2 Type II audit report or similar security audits performed and validated by an outside firm?*
- ✓ *How do they ensure secure data connections? Is data encrypted in transit and at rest?*
- ✓ *Can certain data, such as financial information, be masked or hidden for certain groups?*
- ✓ *Does the solution comply with United States Federal Section 508 of the Rehabilitation Act for accessibility?*

Once this foundational work is in place, your team can then expand their planning to include functionality unique to each use case. Each stakeholder (administrators, advisors, and registrars and enrollment staff) will have a different list of requirements. We have organized recommended requirements according to each group below.

Manage Student Success Strategy & Outcomes

PRIMARY USERS:
Higher Ed Administrators & Leaders

1. *How does the solution analyze trends around key student success metrics over time, such as retention, course success, and graduation?*
2. *Can the solution monitor and manage enrollment for upcoming terms?*
3. *Can the solution identify opportunities for high–impact intervention?*
4. *Does the solution launch outreach campaigns tailored to support specific students?*
5. *What insights does the solution provide on day one of the term?*
6. *How does the system identify the influence of programs and initiatives in contributing to student persistence and graduation. Does it provide the ability to drill down to specific subpopulations?*
7. *How does the solution dynamically create control groups for efficacy analysis that protects against selection bias?*
8. *Does the solution offer interactive dashboards to evaluate progress in key areas such as persistence, enrollment and graduation rates?*
9. *Are there training options that will accommodate the team's needs? What does training look like over the duration of the partnership?*
10. *What is the ongoing support available post-implementation? What is the policy on enhancement requests and upgrades? Are there support resources available 24/7?*
11. *Does the solution provide flexibility for more advanced research and analyses using the same data?*

Coordinate Proactive Student Support & Advising Case Management

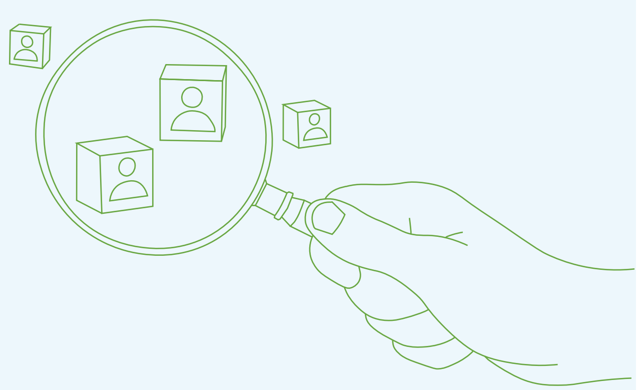
PRIMARY USERS:
Advisors, Retention / Graduation Coaches, Faculty & Student Support Staff

1. *How does the solution identify students who are at–risk of leaving the institution and prioritize both proactive and reactive outreach efforts?*
2. *What information tracking and sharing features are available that prompt follow–up with students?*
3. *How will the solution help advisors and student support staff work more efficiently to reach more students?*
4. *How does the solution help us disaggregate student data and coordinate across teams for more effective and timely student engagement?*
5. *Is the solution able to connect multiple areas across campus to share student information, while maintaining privacy?*
6. *How does the solution maintain communication records (email, messages, SMS, announcements) for each student to coordinate outreach from various offices?*
7. *How does the solution incorporate functionality to manage registration and communication related to events?*
8. *Do students have the ability to make appointments with staff (with bi–directional email and calendar sync), and select their preferred meeting modality?*
9. *How are alerts managed by staff and faculty?*
10. *How does the solution help administrators manage and support advisors and staff?*
11. *Are there utilization metrics or administrative dashboards provided?*

Support On–Time Completion with a Streamlined Student Experience

PRIMARY USERS:
Students, Registrars, Enrollment Staff, Advisors

1. *Does the solution provide self–service tools to improve student course planning, registration, and time-to-degree?*
2. *Does the solution provide the ability to search, plan and register all within the same application?*
3. *Does the solution allow for collaboration between advisors and students?*
4. *Does the solution provide students and/or advisors the level of visibility they need to quickly identify potential barriers to completion?*
5. *Can the solution support students who need to schedule classes across multiple institutions within several schools?*
6. *Can the solution support group registration and importing degree plans into the scheduling solution?*
7. *Can the solution accommodate schedule preferences for nontraditional students?*
8. *Will the solution help me understand course demand?*
9. *What resources are available to drive student adoption of the tools?*



In the end, you are not only selecting a new technology, but a partner who understands your needs and expectations.

Experience and commitment to the higher education sector are important data points to compare in selecting a vendor, so here are a few additional questions to ask:

- ✓ *What year was your company founded and what problems was it created to solve?*
- ✓ *Describe what differentiates your solution from those of your competitors.*
- ✓ *What percentage of your customer base is composed of higher education institutions?*
- ✓ *Provide examples of key staff roles that we should expect to support our institution.*
- ✓ *Provide examples of outcomes achieved using your proposed solution.*
- ✓ *Provide your organization's philosophy of and approach to student success.*
- ✓ *What embedded services are offered to support student success outcomes?*
- ✓ *In addition to your proposed solution, does your company have other areas of expertise?*

Step 3:
Clarify the Purchasing Process

As you narrow your selection down to a final group of vendors, be sure to:

- ✓ *Understand the vendors' approach to training, enhancements and ongoing support. Technology is a start, but it is only the beginning.*
- ✓ *Assemble a cross-departmental evaluation team to ensure the core needs of all users are met.*
- ✓ *Consider whether demonstrations would be helpful in the evaluation process.*
- ✓ *Determine the purchasing options at your institution, including Emergency Relief Funding (e.g. HERF, CARES Act, CA SB-85), Title III or V grants or other state and federal funding options.*
- ✓ *Evaluate if sole source documentation or an RFP will be valuable mechanisms to securing a contract and working towards your project goals in a timely manner.*
- ✓ *Understand internal purchasing processes, including data governance and privacy requirements, the decision approval hierarchy, and when to involve your legal team.*
- ✓ *Talk to references.*

Top 5 Questions to ask references:

1. *How long have you been using the software?*
2. *Describe the process for getting up and running on the software.*
3. *What are the top three things you use the software for today?*
4. *What is the quality of the support you receive from the vendor?*
5. *How has the solution improved efficiency and demonstrated ROI?*

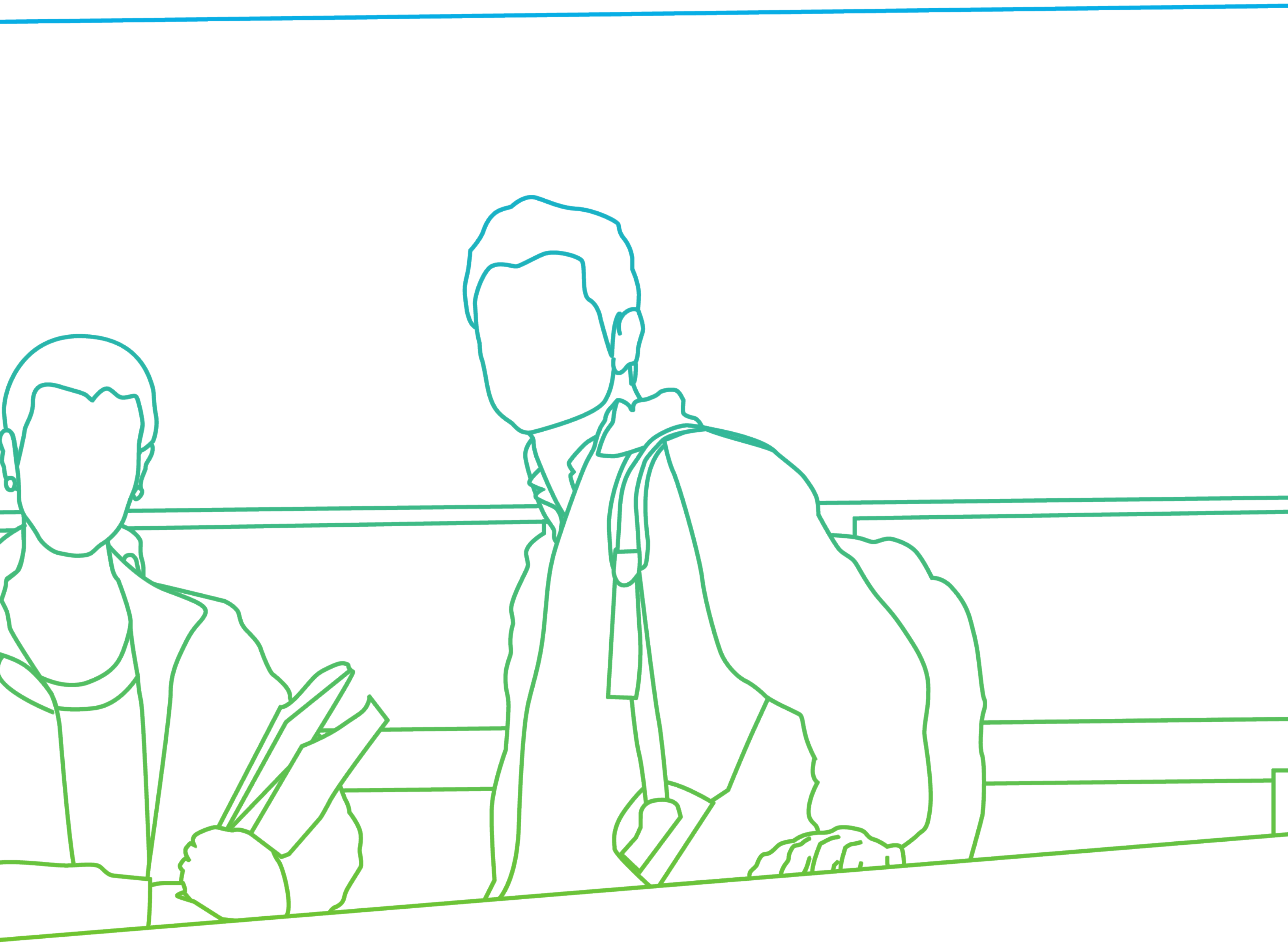
Civitas Learning

Civitas Learning empowers higher education institutions to achieve unprecedented levels of student success and reshape higher education for decades to come. The Civitas Learning Student Impact Platform brings institutional data together for a clearer picture of each student and situation, equipping institutions to lead with a new purpose, find new possibilities, and take bold, data-driven action to impact success for their students.

With this precise knowledge at hand, administrators can know exactly which levers to pull to influence student success and prescribe specific guidance for maximum impact and higher ROI. Advisors, faculty, and staff can collaborate on the most up-to-date data to quickly spot trends, check in with students and course correct without delay.

Today, we work with **nearly 400 colleges and universities**, reaching **over 8 million students**. Together with our growing community of customers, we are closing the student success impact gap and advancing the goals of generations of students.

FOR MORE INFORMATION, VISIT
WWW.CIVITASLEARNING.COM



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