2015-2016 iPASS Annual Report
for the University of South Florida

Progress Narrative

Interim Progress Reports
In five pages or fewer, please provide the following information.

## 1.	Describe activities and accomplishments to date. How do they relate to the original proposed goals and timeline?

A few of our key activities and accomplishments to date include:
- The on-campus hosting of three experts from NACADA who conducted a multi-day program review and gap analysis of our university-wide academic advising program; this engagement helped us engage stakeholders across campus in iPASS and the change efforts, prioritize our areas of focus related to iPASS' call for advising reform, and also set the stage for development of an Academic Advising Strategic Plan.
- The collaborative drafting of a university-wide Academic Advising Strategic Plan by our advising leadership with guidance from our Vice Provost for Student Success; this work enhanced alignment of our academic advising goals and priorities with the institutions' goals and priorities outlined in the USF 2013-2018 Strategic Plan, and also helped establish case management as a primary focus of our iPASS work.
- From the Vision, Mission, Values, and Goals of the Academic Advising Strategic Plan, we are now drafting an Implementation Plan for the Strategic Plan that will detail more closely *how* the goals will be accomplished, including what the work of academic advisors and others in the case management approach might look like.
- The primary focus of our iPASS grant was purposely "pivoted" from an emphasis on academic advisors' planning work with students to a more holistic enhancement of student support services as a whole; to do this, we are planning to implement a case management approach with Appian as our supporting system and with "dashboards" where academic advisors, career consultants, resident assistants, and other support service providers can proactively identify at-risk students and collaborate on intervention in timely ways.
- Development of a funding proposal for implementing our case management approach in Appian; the proposal was approved and awarded through a competitive Tech Fee funding process and provides the necessary resources for a planned kick-off of the project in September.
- Development of and approval of funding for an engagement with Gartner to conduct a "re-engineering" project for our Banner Student Information System (SIS) and Degree Works, our degree audit and planning system; among other outcomes, Gartner will draft a roadmap for our SIS and degree audit/planning system to resolve many of the challenges that have been roadblocks for prior academic advising system projects. A primary focus of our initial iPASS proposal was enhancement of ATLAS in Degree

Works, and though we're pivoting to a case management focus for iPASS, this Gartner project will make possible the future ability to implement academic planning functionality for students and advisors.

2.   Have any major factors or conditions, such as staffing or funding, changed during the reporting period? How have these changes affected the work?

There have not been major <u>new</u> factors or conditions to emerge that negatively impacted our work. Thus far, most of the major developments were planned-for and will positively inform our iPASS work. For example, the Gartner SIS Re-Engineering Project is kicking off on the due date of this report (August 8), we successfully developed a healthy and sustainable focus for our iPASS work in shifting to the case management approach, and we received funding for our advisor dashboard/case management project in Appian.

3.   Were any programmatic or administrative problems encountered? If so, how did they affect the work? How are they being addressed?

While we have experienced and overcome challenges as outlined above, we have not experienced substantive programmatic or administrative problems with our work.

4.   In connection with the Change Essentials program delivered on your campus, how have you used the strategies or discussions in relation to your iPASS work? How are you leveraging what you learned?

The Change Essentials program was helpful in a number of ways. First, planning for the session prompted our primary iPASS leadership team to begin focused discussions on who the broader stakeholders in this project are, and relatedly to begin forming the larger team that would take on the work of designing and implementing the planned-for change. Second, the session itself prompted healthy discussion on the challenge of communicating change with stakeholders across numerous distinct functional areas who often have priorities or commitments that do not necessarily align perfectly across units.

In terms of leveraging what we learned in the on-campus session, there have been a number of occasions where in conversations or meetings we've referenced the penguins from "Our Iceberg Is Melting" and drawn on the books' fable while working through institutional challenges or questions. While formally following all of the Change Essentials steps is difficult through the course of the project, the session, the book, and the discussions about them since have provided a healthy guide for attending to this iPASS work as change.

We also appreciate the opportunity in Seattle to revisit the Kotter concepts, with a focus on the phase of the project we're currently in. In particular, the "sticky message" work we conducted in Seattle was helpful in sharpening our vision for the project and how we might communicate it with so few opportunities to meet with the larger implementation team on campus.

5. Do you anticipate a budget revision? Do you anticipate requiring more time to complete the activities? Please elaborate.

At this point we do not anticipate a revision to the substance/content of our proposed budget, though we do need to adjust the spending timeline. An elaboration of the "why" for this adjustment is provided in the Budget Narrative, with Questions #1-3 offering additional context.

In summary, our pivot to case management has been very healthy and fills a needed gap at USF, but the work involved in conducting the pivot took priority over making our originally planned expenditures. Because the substance of our planned expenditures continue to align very well with the new case management approach, and now that the foundational aspects of the pivot are complete, we anticipate expending our remaining FY15-16 funds in FY16-17 toward the already-identified plans and purposes. As an example, from our Consulting & Professional Fees category we are working together with Ana Borray and Greg Ratliff to host a design thinking session at USF for our larger stakeholder team to cultivate positive ideas/actions for change, accelerate our pace of change, and maintain urgency toward the case management model.

6. Briefly describe major activities planned for the next phase of the project in both technology implementation and advising reform.

Our next major activities toward both the technology and the culture/process aspects of the project include:
- An idea-building "flare and focus" session with our academic advising directors that builds on the flare/focus approach of our Seattle design thinking session. The purpose of this August 15 session is to prepare for kick-off of the advisor workspace/case management project by thinking innovatively about academic advisors' work with students and one another.
- The advisor workspace/case management project with Appian is planned for kick-off in September. We will be using an agile development approach and anticipate two 10-week development cycles with roughly a 1-2 month "use" cycle in between. This will allow us to quickly get the new processes up and running in the first 10 weeks, assess the new processes and functionality in the "use" cycle, and then enhance/extend functionality in the second 10 weeks.
- A large-scale "Student Information System Re-Engineering project" being facilitated by Gartner is scheduled for kick-off on August 10. Among other work, they will draft a roadmap for our SIS (to include our degree audit and academic planning functionalities in Degree Works) intended to address many of the systems' fundamental challenges that have been roadblocks for prior projects, including for Degree Works/ATLAS.
- Hosting a design thinking session on campus with all of the iPASS project stakeholders, to include all of the areas participating in the case management approach. If we can secure an external facilitator, we plan to bring them to campus through iPASS funds to host this session.

- Putting the "innovation micro grants" from our initial grant proposal into play. One focus of these innovation grants was to set the stage for creative action with technology among our advisors, and timing is healthy now that the advisor dashboard/case management system project is set to kick off.

7.   What achievement are you most proud of in the first year of your iPASS work?

If we must choose one aspect of the project to highlight so far as an achievement, it would be the _collaboration_ we've sustained through the pivot of our iPASS project to a case management approach. "Collaborative" is the one word we used in our iPASS grant application to describe how change happens at USF and in taking that commitment seriously we've been able to maintain our cross-unit partnerships through competing priorities, challenging timelines, and substantive change.

Through this collaborative process, an outcome we're proud of in this first year is the development of a draft Academic Advising Strategic Plan that built on the NACADA gap analysis/program review we conducted in mid-Spring 2016. We understand strategic plans for academic advising to be somewhat unique in themselves, and for USF it represents a focused effort to enhance alignment of our advising efforts with the USF 2013-2018 Strategic Plan, our aspirations of becoming an AAU-eligible institution, and the challenges of meeting key state performance funding measures.

8.   In what areas or on what issues do you need additional support from EDUCAUSE/Achieving the Dream?

As shared already with Ana Borray and Greg Ratliff we very much appreciate the support of EDUCAUSE and the Gates Foundation in helping us bring about these positive changes for our students. Ana is already graciously working with Greg and others to help us arrange a design thinking session on campus for our full iPASS stakeholder team. We recognize not all grant makers/administrators work this way so _thank you_ for your support already!

Outside of this more immediate help, one aspect of our work that could benefit from support is in the integration of multiple change efforts. At an institution as large, young, and ambitious as USF, we have many change efforts simultaneously underway and the balancing of all those efforts together is challenging. (This even surfaced in our Change Essentials workshop when participants discussed "change fatigue"). Design thinking and the Kotter framework seem most helpful in the context of one project/initiative, and while acknowledging the breadth/depth/scope of what counts as "one" project may vary, it would be helpful to better understand how organizations or individuals who've been successful at balancing multiple large-scale change efforts have orchestrated that balancing act.