Northeast Resiliency Consortium
IPAS Implementation Manual

Table of Contents

A. Introduction

The Northeast Resiliency Consortium is a group of seven community colleges located throughout the northeast region. The NRC, led by Passaic County Community College (NJ), includes Kingsborough (NY), Housatonic (CT), Bunker Hill (MA), Capital (CT), LaGuardia (NY), and Atlantic Cape (NJ) Community Colleges—all recently affected by crises and natural disasters including Hurricane Sandy, Sandy Hook Elementary shootings, and the Boston Marathon bombings—are committed to taking a catalytic approach to using knowledge, innovation, and education to build resilient workers, institutions, and communities. The following information was gathered from the experiences of the colleges in the consortium that chose to implement elements of the Integrated Planning & Advising Services (IPAS) technology suite. This IPAS implementation manual provides examples of processes, planning and implementation experiences from each NRC institution. Specifically, the contents of this manual provide examples for other TAACCCT grantees as they evaluate, plan and implement their own IPAS systems.

Initially, the NRC sought to choose an IPAS system that would serve the entire consortium. However, due to the nature of having seven colleges in four different states it was ultimately up to each NRC institution to evaluate and select an IPAS system based on the institutions needs and technological environment. Institutions had to weigh issues surrounding IT, administration, counseling, liability, and confidentiality issues. NRC colleges all have both for credit and continuing education programs so colleges had to make the decision on how to serve each population of students. A key concern was how to sustain the capabilities of each IPAS system beyond the life of the TAAACAPITALT grant. In addition, NRC colleges had to decide how they would incorporate IPAS systems with existing software (e.g. Blackboard, proprietary databases) and institutional processes (e.g. extant counseling practices). Through the Department of Labor TAAACAPITALT Grant, each institution developed its own approach to IPAS that suited its existing and enhanced programming.

To assist its institutions in deciding on an IPAS system the NRC worked with its national partner Achieving the Dream (ATD) to create a gap analysis, and to facilitate a demonstration of each IPAS system. Following the demonstrations, a survey was developed so that each college could focus its ideas about individual platforms. Question topics included the usability and navigability of each product, which product offered more features at a higher quality, which product would have the greatest impact on improving student success, and which product would best fit an individual institution. The following is a sample of these results:

What features do you feel will have the greatest impact on improving student success?

Feature	Value
Record notes and visit record (i.e. apt w/ counselor, prof, etc.) in an e-student record	10
Early Alert System	12
Predictive Analytics to identify potential student risk	11
Ability for easy inter-departmental information sharing regarding students	11
Real time data reports and analysis	10

The NRC also enlisted the assistance of outside experts. Representatives of the Community College Resource Center (CCRC) gave a presentation on helpful strategies and pitfalls of incorporating new technology into an established institutional system. The CCRC also shared its report *Adopting New Technologies for Student Success* with consortium members. The report and other resources are available at the CCRC website.

B. IPAS Module Implementation by College

College	IPAS Modules
Bunker Hill Community College	Hobson Radius (CRM), Ellucian Modules (Colleague, Self-Service, and Student Planning
Capital Community College	Ellucian Modules (Career Service, Symplicity Insights) CARE Early Alert
Housatonic Community College	Ellucian Module (Degree Works)
Atlantic Cape Community College	Ellucian Modules (Colleague , Self-Service, and Student Planning Insight, Symplicity Insights)

C. Lessons Learned

While each NRC institution took different routes to implement their chosen IPAS system, there were some lessons learned and key findings that the colleges had in common, or are significant enough to highlight. The following case study section presents each institutions experience in more detail.

- IPAS systems often take a considerable effort to customize to individual institutions. Many systems require the institution to import their entire course catalog and offerings. This requires constant updating, as new courses are offered, and other course are deleted.

- Institutions should give thought on how to maintain staffing levels after the systems are up and running. Many of the NRC employees charged with implementation of their respective IPAS systems were funded by Department of Labor grants. Once their contracts ended several NRC colleges had to transition administration and maintenance of the systems to permanent staff. Also, institutions were

- Implementation teams should consist of a diverse set of staff and faculty. They should include administrators, IT and technical staff, as well as end users (student service, counseling staff, advising staff).

- Once established, implementation teams should meet regularly to discuss roll out and trouble shoot any issues.

- If possible, institutions that are considering implementing an IPAS system should contact neighboring colleges to solicit feedback on how IPAS is used and the implementation process.

- The NRC found the IPAS systems to be most useful in giving students an easy way to monitor their progress, make advising appointments, and be able to use the systems on smartphones.

- IPAS systems provide a wealth of data for student success analytics and predictive analytics. Institutions can incorporate more interaction data into these predictions for proactive outreach.

D. NRC IPAS Implementation Case Studies

Implementation strategies varied throughout the NRC, but most institutions found that a soft rollout with only a limited number of users in the initial phase to be useful. Most schools found that it took roughly one year to implement IPAS with additional time added for troubleshooting and refinement.

I. Capital Community College Case Study

The Capital Community College (Capital) NRC Recruitment and Retention Coordinator narrowed down the IPAS option to three products that would work best for Capital's needs. He provided webinar demonstrations for Capital staff, as well as NRC staff. Capital's goal was to have an open and collaborative selection process. Capital NRC staff worked with Career Services to get a better understanding of the existing system used for resumes and to troubleshoot what is needed for better student service that the new IPAS system could provide. The implementation team decided to focus on using the IPAS system as a resource for faculty and the advising staff, and wanted to avoid duplicating tools and functionality that already existed.

Eventually, Capital decided to employ Symplicity's Insight for its student information management and tracking system capabilities, as well as the Career Services Module as it was more elaborate than the previous system used by the college, and allowed students more options. Faculty, staff, and students would utilize these new systems to increase student success, retention, and communication in order to decrease attrition rates. A major focus would be put on

streamlining counseling and career placement services. Capital hoped the Insight tracking system would enhance the college's already existing Early Alert System by allowing faculty and staff to reach out to students who may be struggling in their classes in a more timely and effective way. In addition, Capital hoped the system would assist the Counseling Office with scheduling student appointments and help the College track student progress. This effort would hopefully lead to better student outcomes, specifically retention and graduation rates. The system went live in September 2015.

Capital created an implementation team consisting of a diverse set of employees. The Implementation Team was made of student service, counseling staff, advising staff, Academic Service Center staff and NRC grant staff. The implementation team met bi-weekly to learn about IPAS products and how to customize them to Capital's needs. In addition, Capital reached out to their counterparts at Norwalk Community College (also in the Connecticut Community College System) to see how they used the system. One meeting per week was scheduled with Symplicity representatives and the second was a "homework" session on how to implement and scale the products for Capital. Several staff spent time 'programming' the system and prepopulating forms in order to customize the systems to Capital. Implementation was more time consuming than Capital originally thought, as staff did not realize they would responsible for customizing/programming the system. They had anticipated Symplicity representatives would do more of the customization.

Following the initial rollout, Capital added the Kiosk feature to the Symplicity order by way of an amended contract. It was added to help wait times for student course advising during registration period. In addition, the Recruitment and Retention Specialist worked with the implementation team and IT to get student Symplicity sign-in computers up and running outside of the counseling office. Initially, the Kiosk feature of the software did not function as expected, so a work around was developed to utilize the display. Despite early hiccups, the system helped staff look at how their office is organized, the triage process, and to streamline the process further. In addition, the system only updates weekly on Mondays, so students who register do not show up in the system until the following week. Now, students are able to log in to make appointments with counselors and advisors. The counselors now fully utilizing the Kiosk tool and students are logging in to make appointments with advisors, counselors, career services etc. The counseling/advising staff enjoyed using the kiosks, because they no longer have to rely on a paper sign in system for walk-ins appointments. Students have spoken about the ease of making appointments and no longer standing in a long line. Counselors have mentioned that students are keeping appointments more often, these means more students are actually getting assistance. The software also helps students arrive better prepared for their counseling appointments.

After initial rollout, the IPAS implementation team continued to hold biweekly meetings to discuss the day-to-day operations of the system as well as how to get faculty and students fully engaged in utilizing the system. The Academic Success Center, which offers students tutoring services, was added as a partner to the IPAS Implementation team. The Recruitment and Retention Specialist planned a multi-day student kickoff event to show students how to use the appointment tool and make them aware of the new online advising tool. In addition, staff created detailed instructions, as well as an instructional video to ensure that it was as simple as possible.

The Capital Recruitment & Retention Specialist worked in collaboration with college advisors who previously ran the Early Alert program at Capital, to create an online CARE Report that is currently being utilized by all faculty members at the college. This expanded the range of alerts that can be sent by faculty to include not only academic concerns, but behavioral and well-being concerns as well. The CARE alerts were received positively by faculty as the CARE staff received more alerts at an earlier time than usual. In addition, faculty highlighted ease of using the new system's remote option, which can be easily accessed by Adjuncts off campus. NRC faculty and staff were asked to use the

advising system to test the system before mass roll out to college faculty for advising. An event was scheduled to show the system off to all college faculty. The CARE Early Alert System:

Identifies students who are 'at-risk' academically (performing below a "C" level or in danger of failing), exhibit a behavioral concern, or demonstrate a concern for his/her well-being. The goal of this college-wide initiative is to increase the retention and success of students at Capital. The appointment scheduling system displays only the days and times that advisors are truly available. Students can find the time that is convenient and make an appointment. Also, students are encouraged to visit the Capital multi-media Resource Library to view documents, images, YouTube videos, presentations and other resources posted from the advising office.

Current Capital staff will administer the system when the grant funded Retention Specialist's contract ends. The counseling staff enjoyed using the system and stated that it makes them much more efficient. Since Capital has started using the IPAS system, they have processed 435 CARE Reports/Early Alerts. Faculty are satisfied with the ease of using the system and its accessibility. As of 06/30/2016, 412 students have logged into the system to utilize the appointment tool, 18 of which are NRC participants. Manchester Community College has been interested to learn about Capital's experiences with the IPAS system, Symplicity Insight, as they have purchased the same system.

Employers were invited to start accounts in the Career Service Module. Students were shown the system by Career Service staff and the Capital's NRC Job Developer as they come into the office for one-on-one help. Capital did not initially launch a wide spread roll out of the system as they wanted to be sure to have the time to test and work out the bugs before inviting the entire student population. Capital hosted larger student workshops on how to use the system. The Capital Career Services Director does not see long-term sustainability for this product as it takes several personnel to administer properly, as the Office is essentially only staffed by one member, therefore, Capital will not continue use this product after the grant term.

II. Housatonic Community College Case Study

In implementing Ellucian Degree Works, Housatonic Community College (HCC) found that creating an implementation team with the correct individuals to be critical to the success of the process. As a member of the Connecticut State Colleges and Universities, Housatonic is supported by a centralized team of IT professional that manage hardware and networks throughout the state. Degree Works is being implemented across the *CT Colleges & State Universities* system (12 community colleges, 4 state universities, and Charter Oak – an online institution). All 12 Community Colleges share one instance of Banner and the CCSU manages the Banner system. Each individual college has limited control over Banner functionality. For this reason, the overall implementation process was managed through CCSU, not at Housatonic locally. There are four cohorts for the project and Housatonic is in the first cohort, and the first of the Community Colleges to implement Degree Works. This required that the HCC team worked very closely with the CCSU Data Center to implement the system for the college. There were many decisions to be made regarding the preparation and presentation of data (courses, programs, degrees offered, student display, etc.)

Because HCC was the first of the community colleges, the implantation was also a learning opportunity for the CCSU team and better prepared them for assisting the remaining colleges in the system. HCC's local team consisted of the college Registrar, a data specialist with extensive knowledge of the HCC academic information and processes, and 2 end-user advisors. The data specialist was a former webmaster for the college, and was familiar with the technical aspects of HCC's IT software landscape, the hardware used to run it, and the content that was needed to populate the IPAS systems. In addition, she understood how Housatonic's data was stored, had some programming knowledge, and previously managed database for all courses. The CCSU team was equivalent to an IT/Tech team.

Housatonic expected Degree works to provide the following benefits:

- **Registrar**
    - o Front desk associates will have easy access to a student's evaluation if needed to help students
    - o Apply course waivers (exceptions) to student requirements when granted
    - o Determine eligibility for graduation
    - o Certify student degree evaluations for graduation
- **Advisors**
    - o Track progress of their advisees
    - o Easily view information in the same format as the student, facilitating student/advisor interaction and enhancing communication
    - o Enter "Notes" on a student's record to maintain an ongoing record of advice shared with student
    - o When "Plans" are in place (later date) will be able to identify advisees that are off-track
    - o In addition, advisor can review any student's record, not just assigned advisees. Students can seek guidance from any full-time faculty advisor; they are not limited to their assigned advisor.

Housatonic created student and advisor FAQs that train users in the Degree Works system. Students can find such information like information about degree works, how to use the degree evaluation feature, using the "what if" feature, how to calculate their GPA, and how to print materials from the tool. Advisors are able to see the same information as the students with added features like adding notes to a student's degree evaluation and information on waiver and exception procedures. HCC expect to refine as time goes on and questions emerge. They are available at http://www.housatonic.edu/degreeworks and at the Colleges YouTube channel https://www.youtube.com/user/CTCCEdTechTraining/featured.

In order for Degree Works to function properly, the course catalogue must be constantly updated. This requires staff who know the catalogue and the Degree Works system to be available to input the data, and incumbent on the HCC Registrar to train more people to ensure continuity of knowledge and service. As mentioned earlier, Housatonic does not run its own IT system. HCC relies on a central system (CCSU) for IT and data support. The central office was experienced and knowledgeable enough to interface between HCC administrative staff and technical people from Degree Works. However, If Degree Works is initiated by a college that does not rely on a central IT support structure, then it would be necessary for college staff to be fully engaged with the vendor technical staff throughout the process, as this is a very complex process and the tech team needs continuous input from end-users. Housatonic's success has largely depended on having staff that have deep programming knowledge, as well as familiarity with hardware issue. HCC administrators have embraced the project and have acted as its constant champions. HCC students love the interactive experience as the system has good visual progress/status systems and can be used on smartphones.

Due to the necessary involvement of the CCSU the timeline was dictated by them and the Ellucian team. The initial discovery for the project was in June 2015. Below is a brief outline of the process:

- 6/8/16 - Scribe Readiness Meeting

- 6/19/15 - CCSU DW Install (testing environment for Community Colleges)

- 6/24/16 - DW Demo WebEx

- August/September – prepare course and program data for Scribing (proprietary code used by DW)
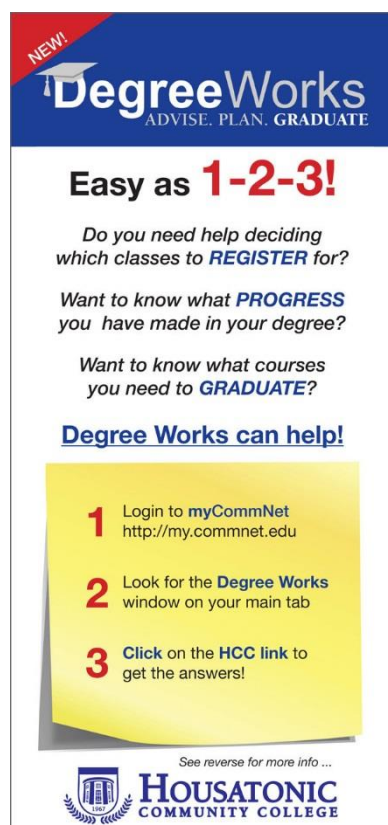
- 9/29/15 – HCC Decision Planning Prep Call

- 10/20/15-10/22/15 – Decision Planning Workshop with Ellucian consultant. Consultant will learn school's business practices, academic data structure, etc. for initial set-up in DW

- 11/9/15-12/11/15 – Ellucian Scribes our college catalog (programs offered)

- December-February – HCC validates Scribe blocks for errors

- 2/16/16-2/19/16 – Functional Training 1

- March – HCC re-scribes all programs done by Ellucian to correct the way electives were scribed by consultant.

- 4/5/16-4/7/16 – Functional Training 2 (includes decision-making for Web Localizations)

- 4/11/15-4/15/16 – Web Localization decisions from Training 2 are performed by Ellucian consultant

- 6/7/16-6/9/16 – Functional Training 3, focusing on more advanced features and customizations of DW. Includes training for Student Educational Planner that will be implemented at a later date.

- 7/29/16 – completion of HCC Clone to PROD from TEST

- August – September – Test all data in PROD, confirm all elements of degree evaluation are processing correctly in DW audits.

- 10/3/16 – Go-live for HCC advisors, test extensively including the *single-sign-on function.

- 10/15/16 – *Single-sign-on testing for students

- 11/1/16 – Go-live for HCC students.

- November and beyond – we will continue to troubleshoot issues as they arrive. Although we have done extensive testing before launch it would be impossible to anticipate every scenario that must be considered.

*Included in the HCC implementation was the creation of a "Portlet" in our Luminis portal for single-sign-on to Degree Works. This function was performed by the CCSU team.

Beginning June 2016 training materials were developed for the HELP site. Videos are created by the CCSU for community colleges and reviewed and vetted by CSCU and HCC staff involved in the project. Videos can be viewed here:
https://www.youtube.com/playlist?list=PLmAFsK4a4rSamvpUAYrEL13g0czgkp0WH

Marketing Material (including the logo being used by the CSCU system) have been created by HCC. Below is a rack card to be printed on heavy stock and placed on the counters of admissions, registrar, advising center, and in with the program brochures.

III. Bunker Hill Community College Case Study

Bunker Hill Community College (BHCC) chose to implement several of the IPAS systems, including Ellucian (Colleague, Self-Service, and Student Planning), and Hobson's Radius (CRM). They have also had the ability to integrate several other systems that were already in use by the College.

BHCC added the new IPAS services to its Life Map suite of student services. LifeMap is a program and a process that is dedicated to promoting student success in their educational, career and life goals. LifeMap utilizes technology combined with personal attention students receive from faculty and staff to ensure a positive and productive post-secondary educational experience. The Bunker Hill Community College portal allows students to access the many technological components contained in LifeMap including email, career-planning tools, ePortfolio, advising and counseling information, financial planning and information regarding support services on and off campus.

The IPAS systems were used by/for all NRC students. They could create online inquiry forms for perspective students interested in applying for BHCC and online application forms for the college application process, managed through iterations for each term. Comprehensive communication plans were created and refined for improved outreach to applicants who are in the application pipeline. NRC participants complete their intake form for NRC via Qualtrics. BHCC faculty and staff provide students the individual direction and support required to fulfill their personal and educational objectives.

Career Coach helps students on monitoring their degree completion and reminding students of important academic deadlines and career events on and off-campus. NRC program staff enter this and other monitoring data into

ZogoTech, the College's data warehouse. Students plan their program requirements and outline in which semester which coursework will be taken using Ellucian Student Planning in context of the students' educational goals and timeline for program completion. Students can register with a link to Self-Service from Student Planning and pay using Student Self-Service (Colleague/Ellucian). Coaches and student support staff enter notes about interactions with students into ZogoTech. Analytics are run during grant quarters and after quarters/annually to pull course enrollment, course success, support service interaction and graduation/transfer outcomes from ZogoTech and are entered into the NRC reporting database (Kingsborough). Graduate employment surveys and waivers to obtain employer released data are also sent via Qualtrics, and these data are included in grant reporting outcomes. BHCC is in the process of developing system tools to be used to engage with the student after the admissions lifecycle, including:

- Communication plans – ongoing email engagement through a tool that can deliver and track information

- Events – create and manage college-wide events

- Cases – this feature allows for the creation of cases

There is a training schedule for Zogotech users (both beginner and advanced training); the tool has three core parts related to IPAS: ad-hoc list/intervention querying and building tool, report building tool, student profile screens that provide contact and academic details, as well as a notes feature. Staff supporting student registration are trained in Student Planning. Faculty and success coaches schedule group advising sessions and in-course time to plan academic schedules with students in Student Planning as part of students' Learning Community Seminar (similar to many institutions' FYE/FYS courses). Ensuring notes and intervention tracking is complete are one set of concerns as caseloads for coaching staff are very large and not all interventions consistently have a follow up note. BHCC would also like to include more faculty in the IPAS support aspects, but data security and union contract specifications related to faculty access for enrollment and grade data are discussions to work out further.

IPAS systems provide a wealth of data for success analytics and predictive analytics. BHCC is incorporating more interaction data into these predictions for proactive outreach. However, BHCC want to make this data easier to track in an automated way and ensure the data is being exchanged between the tools where staff with student-facing roles can have easy access to see a complete picture of support when servicing students. The BHCC campus model has led to rich discussions about data integration and data access as well as how these two aspects can be leveraged to contribute to even more gains in student success. Bunker Hill Community College list the following as the advantages of using their IPAS systems.

- Holistic understanding of the student experience for more proactive intervention with students from College faculty and staff (notes, interventions, interactions all in one place)

- Student goal-setting and timeline for coursework planning in context of these goals

- Automated outreach through CRM to help students stay on track

IV.   Atlantic Cape Community College Case Study

In the summer of 2014, Atlantic Cape Community College used institutional funds to purchase an integrated planning advisory system (IPAS) from Colleague known as Colleague Student Planning. The Student Planning software facilitates degree and course planning by students and faculty advisors. Students and advisors can use the software to map a variety of potential degree completion plans, enabling the student to choose the plan which best meets their

needs. In addition, the faculty advisor can make comprehensive advising notes to assure continuity of planning. The software highlights progress to degree completion, encouraging timely completion of both course prerequisites and all degree requirements. An Implementation team was created with various student services staff and academic success staff. Initially faculty was going to be involved but implementation began over summer. The roll out was a gradual soft roll out where it was first used by the advisors and counselors in Student Affairs for one Semester, and then expanded to a wider group in the college. Advisors and students initiated use of the system in March 2015 for Fall 2015 enrollment.

While the Colleague IPAS software provides a map to degree completion, many students the required assistance with financial aid. Unfortunately, far too few Atlantic Cape students apply for financial aid and/or successfully complete the application process. According to information from the U.S. Department of Education, Integrated Postsecondary Education Data System (IPEDS), only 63% of full-time, first-time degree/certificate-seeking undergraduate students at Atlantic Cape received grant or scholarship aid from the federal government, state/local government, the college, or loans. Furthermore, only 15% of Atlantic Cape students received federal loans. The lack of financial aid can adversely affect degree completion. According to the most recently available information from IPEDS, only 2% of full-time, first time, degree/certificate -seeking undergraduates at Atlantic Cape graduate within the normal time. Furthermore, only 15% graduate within 150% of the normal time. Receipt of financial aid would likely permit more students to complete degree requirements in a timelier manner.

To facilitate student access to financial aid and degree completion, the Atlantic Cape Core Team recommended purchase of the Colleague Student and Financial Aid software. This software guides students through the complex financial aid application process with checklists and dashboards, which show, at a glance, the next action or documents required by the student during the application process. The software is student self-service and compatible with mobile devices favored by students. The software will both empower the student to take the lead in applying for aid and improve the effectiveness of the Atlantic Cape Financial Aid Staff who will have full access to student records and checklists as they respond to student requests for assistance made via the software. The Colleague Student and Financial Aid software module complemented the Colleague Student Planning module by facilitating the financial means for the carefully planned academic goals to be achieved.

To enhance students experience with the software tools ACAPITAL created The Ellucian Go mobile. The app helps students stay connected application with everything at Atlantic Cape and is available for iOS or Android. The mobile application provides features such as:

- Grade Access

- Class Schedule

- View Restrictions

- Make a Payment

- Class Cancellations

- Atlantic Cape News