**College of San Mateo**

Nov 1 – 2

2012

**with Strata Information Group**

08

**Fall**

**Workshop Objectives**

Business Process Analysis:

*First Year Experience*



As part of the effort to improve the first year experience for students at the College of San Mateo, Strata Information Group (SIG) is working with CSM to analyze and improve the underlying processes. This analysis yields two primary outputs: 1) setting a trajectory toward an “ideal,” redesigned process, and 2) identifying next steps in order to align policy, processes, people, and technology to achieve the ideal process. The primary objective is to improve student success by improving their first year experience.

To meet the objectives, a two-day Business Process Analysis (BPA) workshop was conducted to examine all the processes related to a student’s first year experience at CSM. The objectives of the workshop included the following:

* Review the principles of Business Process Analysis (BPA)
* Map the existing processes
* Analyze the process maps and identify obstacles and potential opportunities for improvement
* Design new processes that enhance service, reduce steps, and take full advantage of the technology

Participants came from all areas of the College – students, the President, Vice President for Student Services, faculty, Communications, Financial Aid, A&R, Assessment, Orientation, Counseling, and Learning Center coordinators. Kari Blinn, from SIG, facilitated the workshop. Participants were engaged and invested. They worked hard to identify the issues with the current processes – and to think creatively to generate ideas and set goals for a new process. This document contains the contents and outcomes of the group’s efforts.

**Benefits of a Redesigned First Year Experience**

The group started with identifying the need for improvement – and the resulting benefits:

* Measurable change
  + Increased retention
  + Higher transfer rates
  + Soaring student satisfaction
* Radically improved process
  + Fewer steps
  + Better service
  + Clarity
  + Simplification
  + Shortened cycle times
  + Elimination of errors and re-work
* Free up time to spend with students
* Understand we’re all part of a larger system – common understanding of the process, roles and responsibilities, strategies, etc.
* Empower staff to make decisions – keep student moving through process
* Determine when a step is “good enough” – minimize checking and re-checking
* Give our best guidance to students

**Observations**

During the course of the workshop, participants made observations about the current first year experience. Themes included the following:

* Staff and faculty and CSM have very good connection with students – clearly a core value
* Duplication of recruiting and communication efforts
* Have lots of data, but it’s not all in one place – not looking *across* the organization to assess students’ success
* Overwhelming some students with lots of information and lots of people
* Current process contains many silos – not looking at entire process “horizontally”
* Assuming new students have already made the transition to college
* Many students enter unprepared for college
* Many students come to CSM because of non-College influences – friends, parents, high schools, etc. – need to leverage both internal College activities and external influencers
* Striving for perfect rather than “good enough” – Voltaire, “Perfection is the enemy of the good”
* Current process is “one size fits all” – does not recognize differences between students
* Participants struck by the data – then number who apply and do not take placement tests, and then those who take placement tests, but never register
* Not enough assessment of the effectiveness of outreach efforts
* Need to think in terms of a process – rather than disjointed tactics
* Establish personal contact where it matters – and let technology work where it’s the best tool
* Need to design new process around the rule – and then handle the exception – but don’t design around the exception
* So many departments involved – no one aware of the entire process “soup to nuts” – fragmented, vertical, silos
* Develop seamless process
* Better use existing technology
* Important for front line staff to be involved in the re-design – and to see the process from start to finish
* Don’t “build a better mousetrap” – i.e. tweak the margins – rather re-imagine the entire process from initial contact through first semester

**Process Maps**

Mapping processes with stakeholders serves as a vehicle to:

* Identify issues with the current processes
* Work together to develop clear, streamlined, consistent processes
* Take full advantage of technology

The pages that follow include the maps of the current processes, objectives for the new process, and an “ideal” process map. The idea is to use the conceptual map as a guide for the First Year Experience team as they make significant improvements in the process.

**Recruiting**

**Admissions & Records**

**Recruiting**

**(cont.)**

[conduct a multitude of recruiting activities]

Log on to WebSmart and make appt for orientation (SARS)

**Student**

Process application – resolve suspended records

**Orientation**

Log on to WebSmart and make appt for assessment (SARS)

**Assessment & Testing**

Current First Year Experience Process – 1

Hand out business cards

Send e-mail and contact info

Collect survey (Fin Aid)

Copy and file

Collect contact cards (EOPS)

Instruct prospective students to sign up for PEP program via web

Send letters and e-mail

Collect contact cards from high school seniors

Call or visit and make appt for assessment

Make appt in SARS

Take placement tests

(2.5 hours)

View results

Review results w/ student

Make appt in SARS

Attend orientation

(2 hours)

Complete “ticket to register” w/ test results and desired classes

Conduct orientation

Auto-send e-mail to applicant w/ welcome, G#, and instructions:

1. Assessment
2. Orientation/Course Selection
3. Registration

Enter in Excel

Contact prospective students w/ info

Enter in Excel

Use for drawings and scholarships

Instruct prospective students to sign up for tours on web (retained in separate DB)

Enter concurrent enrollment data in Banner

Extract from Banner to Excel

Send letters and e-mail from Excel

[intersects w/ CCCApply application process]

[intersects w/ CCCApply application process]

**OR**

**OR**

Assign registration appt in Banner

**Recruiting**

**Inputs**

College Fair

College Day

Send 100K schedules to local households

High School presentations – e.g. EOPS, CalWorks, DSPS

Campus tour

Preview Day

Sessions w/ Student Ambassadors

Concurrent Enrollment

Financial Aid presentations

Priority Enrollment

CTE Transitions

Middle and High School student tours

Planetarium programs

High School lists

**Student**

**ID Card**

**(Stu Life)**

**Counseling**

**Business Office**

**Student**

**Faculty**

Take photo

Produce ID card

Go to ID Card office (some)

Make appt to see counselor – phone or in person (not WebSmart/ SARS)

Register via WebSmart

Make appt in SARS

Pay fees online, incl student fee

(some) purchase parking permit online

Go to kiosk

**OR**

Meet w/ student

Come to campus to purchase parking permit

Return to cashier

**OR**

See required books via WebSmart

Purchase books via bookstore or Amazon

If fees not paid and no path for payment, drop students

At beginning of semester, attend class(es)

If class closed, attend class and request add code

Take add code to A&R – may or may not get registered – e.g. no space, pre-reqs, scores, etc.

If approved, give add code to student

Distribute syllabus

Teaching and learning

(Some) Refer to support centers

(Some) Go to support centers

(Some) Enter in early alert system

Auto-generate e-mail to student

(Some) Go to support centers

(Some) Support centers enter contact in SARS

**Support Centers**

Assign grades via web

Current First Year Experience Process – 2

**Redesigned “Ideal” Process**

Characteristics of a redesigned process:

* Do work where it makes most sense
* Minimize handoffs – as few different contact points as possible
* Identify a single point of contact – “integrator” – case worker/team
* Strive for simplicity
* Real-time
* Sacrifice precision for speed and service
* Use best data available
* Enter data once
* Remove non-value-added steps – e.g. reentering data, re-checking data, etc.
* Decrease range of options

Redesigned First Year Experience Process – 1

Recruiting

Start-up

Success

* Coordinated recruiting activities
* Clear message
* High school events
* CSM tours
* Use tech – bring mobile devices to events
* Paying for college
* Complete Banner Web for Prospects – collect interests, math and English grades, scores, etc.
* Enter all contacts in Banner
* Follow up based on contact info
* Connect w/ students, faculty, staff with “like” stories
* Transition to college
* Summer classes – head start
* Pre-populate application and send student link – complete the last few questions

**>Apply** – same time as UC and CSU, get credentials immediately, send welcome “packet”

* More transition
* Engage in co-curricular activities
* Placement
* Career assessment
* Identify specific services
* Intrusive support
* Ed planning – pre-fill classes for 2 to 4 semesters based on ed goal and placement
* Complete guaranteed transfer app – utilize ASSIST
* Incentivize engagement with early registration time
* Buy/rent books online
* Obtain parking permit and ID card

**>Register** in learning community (block of classes)

* More transition
* Engage in co-curricular activities
* Academic success strategies
* Engage support services – see all points of contact
* Meaningful, clear feedback from instructors

**>Pass** classes

Ambassador – point of contact for new student – “triage”

**Project Plan**

The following objectives will become specific steps in the project plan. The idea is to re-imagine the entire process – while at the same time, starting work on specific areas. The first two areas are:

1. Coordinate recruiting activities and implement Banner’s Recruiting module
2. Develop Educational Planning templates in DegreeWorks

The College can build on the momentum generated from success in these first two areas. The group can then focus efforts on:

1. Re-imagining placement and orientation
2. Working with faculty to develop learning communities (blocks of courses first year students take together) and to intervene early when issues arise

| **OBJECTIVES** | **DETAILS** |
| --- | --- |
| Create project structure and plan | * IPC serve as Steering Group, VPSS lead * Recruit project teams * Articulate goals * Identify phases – take work in “chunks” while keep the whole in mind (see above) |
| Coordinate recruiting activities | * Identify single person in charge of recruiting * Develop consistent brand and message * Identify all current recruiting activities (see Inputs column on page 5) * Deploy Banner recruiting module to support coordinated effort – Web for Prospects, configure source and contact tables, test * Provide training * Migrate all recruiting data to Banner * Analyze recruiting efforts – discontinue low-yield activities and focus on high-yield efforts |
| Give our best advice to students – more prescriptive and directive | * Develop Ed Plan templates in DegreeWorks * Leverage what we know about student success * Plan out four semesters – core classes with space for electives – “one of ...” * “Given placement results, take one hard class and start with math or English” * Identify 4 to 6 templates to start with – examples:   + Goal = transfer to UC, major in History, with high placement results   + Goal = transfer to CSU, major in Engineering, with high placement results   + Goal = transfer to CSU with medium placement results   + Goal = complete certificate in Building Inspection |
| Get feedback from students | * Short surveys * Focus groups * Listen and evaluate * Identify biggest “levers” that add value to students * Discontinue activities that students do not value |
| Re-imagine support provided between application and registration | * Explore better ways to provide placement recommendations   + Use data regarding high school English and math grades   + Review SAT, ACT, and AP scores * Explore more effective ways to orient students   + Review research and different media   + If Ed Plan templates jump-start course selection, then consider orientation as “welcome,” and/or “success strategies,”   + Consider longer (or shorter) orientation – e.g. 1-day welcome, 5-session seminar, semester class, etc. |
| Improve WebSmart | * After process redesigned, develop step-by-step checklist * Use clear, plain language * Ensure it is easy to navigate – test user interface with students |
| Pilot, test, get feedback, make informed changes | * Identify pilot group to track from initial contact through first semester * Include communications, admissions and records, faculty, learning centers, counseling, assessment, orientation * Gather data |

**APPENDIX A**

**Feedback from Students**

We had the benefit of hearing CSM students’ input during the sessions. They were candid about what worked for them, what didn’t, and what they would like to see. Their invaluable comments follow:

* Provide clear guidance – e.g. This is…
  + How you register
  + The map of campus and how to get around -- “Where’s the bathroom?”
* Preview Day was helpful
* “I came two days early to walk around campus”
* WebSmart is a valuable tool
* Guidance
* Wander through with ingenuity
* Volunteer students to help other students
* EOPS – John and Tammy’s help
* Easy to sign up to see a counselor
* Candy/chocolate
* Math Lab – “best I’ve ever seen,” clear instructions, quick feedback
* Web Work is “a pain”
* When new to the U.S., need resources at the high schools
* Orientation – “how college works”
* Use all the resources
* Step-by-step information about where resources are
* CSM representative
* Promote best transfer
* Mom came to CSM and reported it was a “great school”
* Labs everywhere
* Welcome – look forward to it
* Would be great to get a welcome “packet” in the mail
* During first semester
  + EOPS
  + Community
  + Helpful staff
  + Sense of belonging
* Great teachers
  + Hearing “good job, I like your effort”
* “Take responsibility for my own education”
* Parents who emphasize college
* Parents who went to college

**APPENDIX B**

**Items Staff, Faculty, and Administrators Believe Students Need and Expect**

Before the students articulated what they need and expect from the College, participants created a list from their perspective:

* Fast
* Getting the classes they want
* Understand the process
* Easy to understand requirements for admission
* Re-framing “it’s me, not mom and dad”
* “Just get me started” – brief manual/quick-start guide
* Professors who teach well – path to deal when there is a bad “fit”
* Explanation of what terms mean – e.g. “certificate”
* Complete all the steps in one trip to campus
* Educate on what to expect in a college class
* Overcome belief that this is “not really college”
* Contacts who listen, understand, and are kind
* Someone to tell them what to do
* Develop a transition plan to help them make the transition
* Easy way to get in to a full class – e.g. via e-mail
* Fast issue resolution
* Expect a class to be available if I need it
* Easier waitlist process – current process with auth codes is confusing
* Some students report that WebSmart “sucks”
* Amazon-like usability
* Fill the gap in time between initial recruiting contact and CCCApply
* Align CSM admission cycle with UC and CSU
* Improve information regarding academic programs and CSM offerings
* Develop communication plan for contact throughout the process – from initial recruiting through application, placement, registration, support services, etc.

**APPENDIX C**

**Opportunities for Improvement**

In brainstorming fashion, participants identified the following opportunities. (These are not listed in ranked order, nor do they necessarily represent consensus.)

* Utilize web class schedule – improve look and feel
* Improve clarity about what is needed to register for a class
* Complete transition from paper to online
* Provide a “turbo tax” experience on the web – guided, using questions, through the process
* Influence influencers – e.g. parents, friends, teachers, peers
* Develop an “elevator speech” – stay “on message” about purpose – revisit branding work
* Attract different groups of students – e.g. lower income, “average” students, etc.
* Develop authentic, honest, open marketing strategy
* Explore Banner’s recruiting functionality – e.g. web for prospects, communication plans, etc.
* Collect all recruiting information in Banner – discontinue use of shadow systems – i.e. Excel, Access, paper cards and forms, etc.
* Improve use of social media – Facebook, Twitter, SMS, mobile apps
* Ditch CCCApply and deploy Banner’s web application – evaluate the algorithm to determine residency
* Incorporate PEP into application
* Utilize technology – e.g. iPads at recruiting events, scanning, smart phones, etc.
* Cultivate relationship with student from initial contact to application
* Drill down on existing recruiting data – ask questions – e.g. who made it to the application stage? Identify common characteristics/contacts
* Harness and coordinate recruiting efforts
* Re-language “assessment” to – testing? placement?
* As close to real-time as possible – e.g. application to G#
* Instant G# -- or more broadly, no gaps in process
* “One stop” to get started – one trip to campus
* Clearly identify a contact person/team for every incoming student
* Provide placement testing (or other assessment method) online
* Explore different, more effective, methods for placing students – e.g. high school English and math grades, AP scores, etc.
* Require fewer trips to campus
* Provide credentials to incoming students early in the process – e.g. during recruiting stage – encourage engagement
* Clarify assessment results and recommended placement
* Make catalog more available
* Reconsider printed catalog altogether – provide information in searchable format on the web – re-imagine it
* Provide needed information is different ways
* Continue to improve testing flow
* Allow students to select desired testing dates – not simply next slot available
* Provide alternate paths to orientation – e.g. video, web, group chat, etc.
* Add orientation to the continuum of intake activities
* Review naming – plain, clear language
* Discover new ways to assist students in class selection
* Provide more guidance to students – e.g. “pre-slug” courses based on goal, major, and placement results – utilize DegreeWorks Ed Planning tool
* Develop templates of recommended courses in DegreeWorks Ed Plan
* Develop “path” – sequence of courses for each major – “Here’s what CSM recommends – this is our best advice for your success”
* Develop first Ed Plan during orientation
* Provide orientation prior to assessment
* Require an “orientation” class – e.g. how to be a college student, transition to college, path to transfer etc.
* Re-imagine entire process – from first contact to first day of classes
* Achieve high-tech AND high-touch
* Be more directive in providing guidance – i.e. “here’s what to take the first semester, here’s the plan for your major after that…”
* Ensure orientation includes practical, specific advice
* Coordinate all communication efforts – e.g. welcome, tips, orientation, advising – stay “on message”
* Require counseling
* How do we scale special programs – e.g. EOPS, DSPS, Puente, etc. – expand on core practices
* Recognize that the individual staff/faculty member makes a huge difference
* Ensure “ticket to register” provides assistance with planning
* Consider Career 121 in lieu of orientation
* Expand Student Ambassador model – personal connection, content, guidance – case worker/case team to shepherd student throughout semester
* Research – do matriculation activities correlate with success – for those that don’t, stop; for those that do, enhance
* Encourage students to pay student body fee and utilize ID card
* Incentivize ID card – benefits, security, labs, etc.
* Allow students to upload their own ID photo – after review, produce card – student can pick up at a convenient time
* Provide tips from other students
* Influence the conversation on Facebook
* Link to Amazon from book ISBN information
* Promote web schedule of classes – include ISBN number
* Swipe ID card at bookstore – see required books and location (e.g. aisle number)
* Provide more books that students can rent
* Understand why Skyline has had success with book rental – then replicate it
* Capture “informal” communities – e.g. sports teams, clubs, ambassadors – utilize already existing support groups
* Cultivate a culture of caring
* Demonstrate investment beyond “commuter student”
* Explore different models for different groups of students – not “one size fits all”
* Encourage faculty to validate students in class
* Communicate “Finish steps by January 2nd for January 14th start”
* Conduct student focus groups to assess why they made it to the first day of classes
* Learn to say “too late” for this semester
* Give our best advice to students
* Eliminate “auth codes” for waitlist process – fully utilize Banner functionality
* Consider waitlist limits – or show students their number on waitlist and let them decide
* Use DegreeWorks Ed Plan to anticipate demand for classes in upcoming semesters
* Provide incentives to apply early – get first choice of English and math classes
* Lay out clear timeline
* Could let students register early for X units, then add more later
* Expand PEP incentives to other students
* Focus on syllabus and student learning outcomes
* Connect learning centers and faculty
* Share information across student support services – look “across” the organization to provide support to students
* Take a holistic approach – this student went to Math Lab, plays basketball, and receives financial aid
* Use data across platforms – e.g. SARS and Banner
* Cultivate giving more feedback to students
* Provide more specific and personal early alert message
* Encourage instructors to speak with students directly
* Make early alert obsolete – become more mindful about intervention, we go to them, more “intrusive”
* Co-curricular options are important to parents
* Right-size services to different students – some need less, some need more
* Walk with a student from department to department
* Make waiting in line as appealing as the line at In-N-Out – “the guy is coming”
* Provide fewer options – e.g. like Apple
* Provide more feedback to students about how they’re doing – e.g. mid-term grades – evolve using web access for feedback
* Cultivate self-advocacy
* Utilize learning centers as middle ground – not “called to the office”
* Explore alternative ways to “orient” students – 1-day session with scavenger hunt, 5-day class, semester class, video, etc.
* Provide incentives for students to attend orientation

**APPENDIX D**

**Obstacles**

In the same manner, participants identifiedthe followingobstacles:

* High school students not familiar with course descriptions and other college terminology
* Some students think they can simply show up when classes start
* Newspaper format for class schedule is difficult to read – omits course descriptions, pre-requisites are confusing, information not up-to-date, not user friendly for staff
* Process is complicated
* Because recruiting activities are not coordinated and the data is maintained in shadow systems, cannot analyze which activities result in attracting and supporting students
* With so many separate recruiting activities, not asking the question “what’s our message?”
* Pockets of recruiting activities
* Missing data and analysis of recruiting efforts
* Many groups doing recruiting – may or may not be effective
* Gathering home phone rather than mobile
* Don’t have manpower to follow-up with all students
* Disjointed recruiting efforts
* Redundant, duplicated recruiting efforts
* Reinforcing silos
* Handoffs missed
* Lag time between submitting application and receiving G# -- creates a “stop” in the process
* Process even more complicated for international students
* Some students must make up to four trips to campus before registration
* Obtaining G# is an obstacle
* Cannot get an ID card unless paid in full – can be a Catch-22 for students
* Uncertainty about meaning of placement test scores – “out of what?” “what next?”
* SARS/WebSmart not intuitive for scheduling appointments
* Orientation is long – many tune-out after 30 minutes
* If late to orientation, must reschedule – sign on the door is not welcoming
* Complaints about orientation – I’ve already done it, why do I have to do this?
* Mixed message – want personal contact, but don’t want students to jump through hoops
* Too many options
* “Orientation” means something different than the content of the session – current format focuses on preparation for academic advising session
* Students have mixed experiences with counseling
* Assessment scores and placement different across the District – difficult for students
* Too many parking choices
* Student portal – WebSmart – not easy to navigate
* ID card machine breaks down
* Sticker shock with text books
* Some students don’t know they need to buy or rent books
* CSM changes text books and editions often, makes it difficult to rent books
* When students miss “pay by…” date, then out of luck for semester
* “Add” or “auth” codes (why two names?) do not necessarily guarantee entrance into class – confusing to students
* Sometimes there are delays using add/auth codes
* Students on too many waitlists
* Number of spaces on waitlists is not consistent
* Demand for seats in many classes exceed supply
* Difficult to predict demand for classes
* Possible to get an add code, but not be able to act on it
* “TBA” in class schedule is confusing
* Fourteen support centers – confusing for some students
* Not using all tools effectively – e.g. early alert
* “Wild goose chase” for students trying to navigate all the student support silos
* Multiple referrals for the same student – but not a coordinated response
* In the same line regardless of what you need – i.e. “S/M/L”
* Long way to go with co-curricular activities and building community – need to broaden support for students
* If grade is changed, some students are miffed
* After semester ends, it is sometimes difficult for students to reach instructors