

Student Success Collaborative Project Charter

Institutions across higher education are concerned with helping students persist, progress, and graduate with a quality education at lowest possible cost. Helping students attain their degree with reduced time-to-graduate and reduced credits-to-graduate lowers their debt; closing the achievement gap among diverse student populations levels the playing field for all students.

UW Oshkosh can be an institutional performance leader in the state of Wisconsin. The Chancellor and the Leadership Council has identified the Student Success Collaborative (SSC) hosted by EAB, the Education Advisory Board, as an enabling solution to help faculty, advisors, student support services, and the administration support student success. Using UW Oshkosh present and historical information, the service provides data analytics, case management, and professional support faster and more efficiently than we could conceivably achieve independently.

Charge

The SSC project team is charged with:

1. Discovering best practices in the use of data analytics and case management to support RPG improvement.
2. Planning and leading implementation of the SSC service.
3. Planning and leading business process redesign to assure effective use of the service.
4. Overseeing user education of faculty and staff.
5. Developing a framework to assure effective institutional use and data-driven continuous improvement in RPG.

Scope

Inclusions: The scope of this project is delimited to implementation of the SSC service for academic advising by faculty and professional advisors. It includes research of best practices, engagement with professional services, strategy development, process redesign, communications, user education and development of the framework for ongoing use.

Exclusions: This project excludes ongoing oversight of the SSC program. Once the scope and charge of implementation are complete, the implementation project is concluded; the program will continue indefinitely as defined and maintained by the framework developed.

Strategic Alignment

SSC implementation is a project in support of the larger program of Enrollment Management. It is a tactic enabling the program goal of continuous improvement in RPG with special attention to closing the achievement gap, a high-priority objective of the institution and directive of the Chancellor.

Objectives and Key Performance Indicators

Successful SSC implementation will enable practices to improve RPG and close the achievement gap through the use of data analytics and process automation.

Project performance will be measured by three Key Performance Indicators (KPIs):

1. Academic advisors, both faculty and professional, consistently and reliably use the software to manage cases.
Measure: Number of users; frequency of logins.
2. Departments use data analytics to evaluate and improve their program RPG.
Measure: Program reports; quality and quantity of department-designed RPG improvement interventions.
3. Institutional RPG is measured and monitored showing long-term improvement.

Measure: Time-to-graduate, credits-to-graduate, across diverse populations.

High Level Deliverables

The Admissions CRM project will produce the following deliverables (tangible outputs):

- Installed, integrated, configured service
- Student data governance defined and formalized
- Users educated in the use of the tool and data
- Framework assuring ongoing effective institutional use and data-driven continuous improvement.

Key Milestones

A project plan will be developed detailing the activity and schedule to meet the following milestones (a significant point of identifiable progress):

- Project plan
- Validated data extract
- Case management process design and implementation
- Data analytics and reporting
- User education

Critical Success Factors

Critical Success Factors (CSFs) are those things that **MUST HAPPEN** in order for the project to succeed. CSFs for this project and for the larger Enrollment Management program are noted as:

1. Phased-in approach to help users make the most of the information.
2. Careful management of student records to protect privacy.
3. Across the board adoption by faculty, student support services, administration.
4. Council to oversee institutional use.

Risk Management

A formal risk register and management plan will be created. Following are high level summaries of probable risks and risk management strategies for the SSC project.

1. Inconsistent or unreliable data in the SIS could confound data analytics results.
Data extracts will be validated by Subject Matter Experts and the project team.
2. Lack of user adoption could render the tool ineffective if it is not a system of record for academic advising case management.
Chancellor will continually champion the use of the data to inform decision making, requiring across-the-board use of the tool. Departments will be challenged to use the data to design RPG improvement interventions for their programs. Program evaluation will incorporate RPG metrics.
3. Legitimate need to protect sensitive student data could spiral into many individuals overly protecting student data to the point that we have insufficient data.
Project Team will investigate how other institutions have handled. Templates will be created to guide individuals in how to appropriately and sensitively phrase information. Permissions will be applied to protect HIPAA/FERPA governed information.

Roles and Responsibilities

The project core planning team consists of the following individuals with defined roles and responsibilities. Additional work teams may be defined and tasked as needed.

Role	Individual	Responsibilities
Program Sponsor	Chancellor Leavitt	Authorize investment; champion the initiative and hold team accountable.
Program Owner	Jenny Watson	Lead the overall program.
Technology Leader	Anne Milkovich	Lead technology implementation.
Value Leader(s)	Liz Whalley	Lead functional planning and oversight.
Council	Jessica Spanbauer Karl Loewenstein Irma Burgos Justin Sigler Victor Alatorre AVCEM Jenny Watson Liz Whalley	<ul style="list-style-type: none"> ▪ Guide project team in implementation of SSC relative to campus stakeholders. ▪ Communicate with stakeholders and positively represent the SSC initiative. ▪ Provide guidance in applying best practices within our campus culture. ▪ Establish access and permissions guidelines and requirements. ▪ Assure effective usage of the SSC system so intended results are realized.

High-Level Budget Information

Rough Order of Magnitude (ROM) cost estimates, provided below, have been developed and submitted to the Executive Sponsor. As these are ROM estimates, they are subject to change on the scale of +/- 50%. Further discovery is required before a project budget can be developed. The budget and actuals will be tracked and reported as part of project management activity.

Actual project costs will vary depending on the type of solution, e.g. a self-hosted solution will require hardware investment where a hosted solution will not. Costs provided use the more conservative self-hosted solution as a basis.

Note on staffing: IT staffing is estimated as .02FTE Server Admin allocated to this product. IT does not have surge staffing to absorb this FTE load. A 1.0FTE Server Admin needs to be hired upfront to support the system, whether on-site or off-site hosted. Only 0.2FTE will be allocated to this project and the remaining FTE will be allocated to support of other systems soon to come online such as the CMS, ImageNow, and so on. We have also estimated the 1.0FTE against the CMS proposal underway, not knowing which product will come online first. Only one 1.0FTE Server Admin needs to be hired at this time, of which 0.2 will be allocated against CRM, 0.2 will be allocated against the CMS, and 0.2 will be allocated against each subsequent project until the full 1.0 FTE capacity is reached. A single Server Admin can support multiple systems, but when existing Server Admin capacity is reached, the full budget amount of an additional Server Admin needs to be covered as new funds upfront.

Revision Control

Revision	Date	Author	Reason
1.0	03/31/2015	Anne Milkovich	First Draft
2.0	04/24/2015	Anne Milkovich	Added Council responsibilities