

## GP Redesign College Process Project Meeting Agenda

11/18/2019, 10:00-11:30am, Bldg 9-123

Diva Ward, Margie Carrington, Melissa Alforja, Maria Huning, Yesenia Mercado, Dina Zidan, Luanne Canestro, David Eck, Karrie Mitchell

Topic	Discussion/Outcomes
Review <a href="#">11/4 Meeting Notes</a> (5 minutes)	<b>Comments, corrections, or questions from the November 4<sup>th</sup> meeting:</b>
CRM Presentation (45 - 60 minutes) <b>Presentation appended to meeting notes</b>	<b>Information/Discussion</b> Karrie D. Mitchell, Ph.D. Vice President of Planning, Research and Institutional Effectiveness SMCCCD  <a href="#">Key highlights most relevant to Redesign College Process</a> <ul style="list-style-type: none"><li>• SARS will be phased out.</li><li>• Appointment function along with integration of Outlook and Google Calendars</li><li>• Three different types of alerts: 1) proactive, 2) Early Semester, and 3) Post-Semester</li><li>• Assign Task function to individual students or groups of students. Example task: complete FAFSA application or task list (example of applying for an internship used)</li><li>• Meeting with functional leads of colleges in order to identify pain points.</li><li>• Phase 1: Recruitment and Marketing. [About to be deployed/Just deployed.]<ul style="list-style-type: none"><li>○ Four types of recruitment forms</li><li>○ Marketing Cloud &gt; Student journey<ul style="list-style-type: none"><li>▪ The particular student journeys are implemented at the college-level. They can modify the particular steps (for example, email versus text. Or what types of information follow-ups are provided if a student hasn't yet applied).</li><li>▪ There is a District technical support team for using/developing the CRM features.</li></ul></li></ul></li><li>• Phase 2: Matriculation and Enrollment: Goal for going live is February 2020<ul style="list-style-type: none"><li>○ Communication processes for messaging students based on whether they have completed the FAFSA or not. And so on.</li></ul></li></ul>

- Question: if there is an automated message to student from an employee (for example, financial aid), will the message also appear in a financial aid employee's Inbox? Can students reply directly to the automated messages?
  - Students can reply directly to the messages
  - Messages can have permission levels to protect privacy (such as, financial aid applications)
  - Could duplicate these messages to exist within the CRM and in our Outlook Inbox. But starting out, the messages will be limited to CRM ticketing platform to avoid redundancy.
  - Messages could potentially be sent in middle of night to student if the student completed some application or form in the middle of the night that triggers the automated message response.
- Phase 3: Retention and Counseling
  - Grade concerns could be automatically provided by linking alert system directly to Canvas.
  - Diva: should include someone from learning center on an academic early alert.
  - You can place case notes in a student's profile. Notes can have permission levels to decide who else can view the note.
- New updates to Banner and DegreeWorks (September 20, 2019)
  - Greater detail: programs of study new detailed, not just majors
  - Identifies whether a program of study is financial aid eligible
  - Identifies whether a program of study is international student eligible
  - DegreeWorks new enables students to pick a particular catalogue year they are eligible for rather than defaulting to the year when they first enrolled.
- Upcoming Updates to DegreeWorks
  - Showing course to program eligibility
  - Providing templates for students for program completion. Unlike program mapper, this tool can show students the particular courses they have already completed.

General Questions after the presentation:

- Margie: what is the general process for improving the tools?
  - Karrie M: continuous improvement model. Quarterly meetings for each unit of the CRM implementation. Use Smartsheets to assign tasks based on the data feedback on the past implementation.
  - Sandy Allen has led the training for each functional unit/workgroup thus far.

<p>Revised Strategic Questions</p> <ul style="list-style-type: none"> <li>- Reframing with Equity</li> <li>- Aligning format with other strategic goals</li> </ul> <p>(20 minutes)</p> <p><b>Revised document appended to end of meeting notes</b></p>	<p><b>Discussion/Action</b></p> <ol style="list-style-type: none"> <li>1. What is the ideal vision for Redesigning the College Process?</li> <li>2. What is our definition of success?</li> <li>3. What is the role of Success Teams, Retention Specialists, and Data Coaches?</li> </ol> <ul style="list-style-type: none"> <li>• Positive feedback on the 11/15/19 revisions to our strategic answers. Everyone attending affirmed the new version.</li> </ul>
<p>Report from other workgroups</p> <p>(5 minutes)</p>	<p><b>Information</b></p> <ul style="list-style-type: none"> <li>• Redesign Academic Support &amp; FYE Workgroup</li> <li>• Early College Experiences Workgroup</li> <li>• Interest Areas and Program Maps Workgroup</li> <li>• Online Education</li> <li>• Career Exploration &amp; Job Placement</li> </ul> <ul style="list-style-type: none"> <li>• There was not enough meeting time for workgroup reports.</li> </ul>

# CRM Update for Cañada Guided Pathways Steering Committee

An overview of the Constituent Relationship  
Management (CRM) system

NOVEMBER 2019



SAN MATEO COUNTY  
**COMMUNITY**  
COLLEGE DISTRICT



# CRM Update for Cañada Redesign College Committee

An overview of the Constituent Relationship  
Management (CRM) system

NOVEMBER 2019



SAN MATEO COUNTY  
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COLLEGE DISTRICT

# Welcome & Agenda Overview

- ▶ Agenda
  - ▶ CRM Background and RFP Process
  - ▶ Overview of the CRM Capabilities
  - ▶ Overview of CRM work thus far  
(Phases of Implementation)

# CRM Background



- ▶ 2017 Technology Taskforce

- ▶ Improve student experience, outcomes and success

- ▶ Three areas of need:

- ▶ Operational efficiency
- ▶ Expanded use of data
- ▶ Ease of use for students and employees

- ▶ Timeline:

- ▶ March 2018: 7 proposals
- ▶ May-November 2018: Presentations, interviews, clarifications on proposals, best and final
- ▶ December 2018: Recommendation to the Board of CRM Platform and Implementation partners

# CRM Background, cont.



- ▶ Constituent Relationship Management (CRM)
- ▶ Technology system used for managing relationships, i.e. prospective, current and alumni students.
- ▶ Uses student historical and ongoing data to create interventions for
  - ▶ Recruitment and Admissions
  - ▶ Retention and Completion
  - ▶ Alumni and Workforce

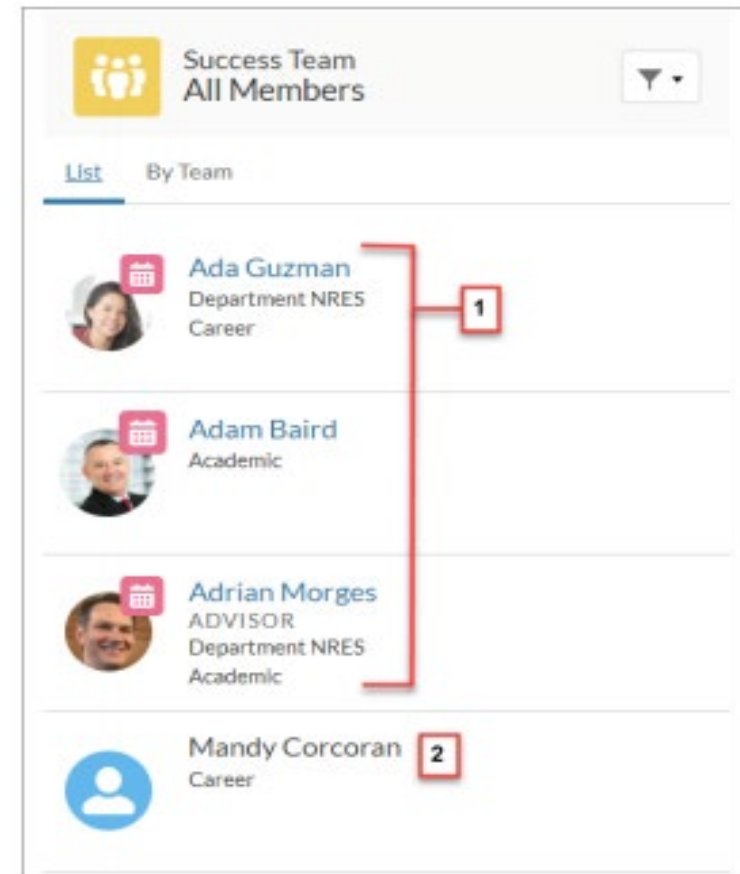


# Overview of CRM Capabilities

- ▶ System of Engagement vs. System of Record
  - ▶ Engage (and reengage) prospects and current students
  - ▶ Communication (Email/Text/Push Notifications/Phone)
  - ▶ Alerts and Interventions, i.e. Success Plans
  - ▶ Chatbots and Knowledge Base Articles
  - ▶ Integration of systems (Canvas, Banner, Degree Works, Accudemia, etc.)

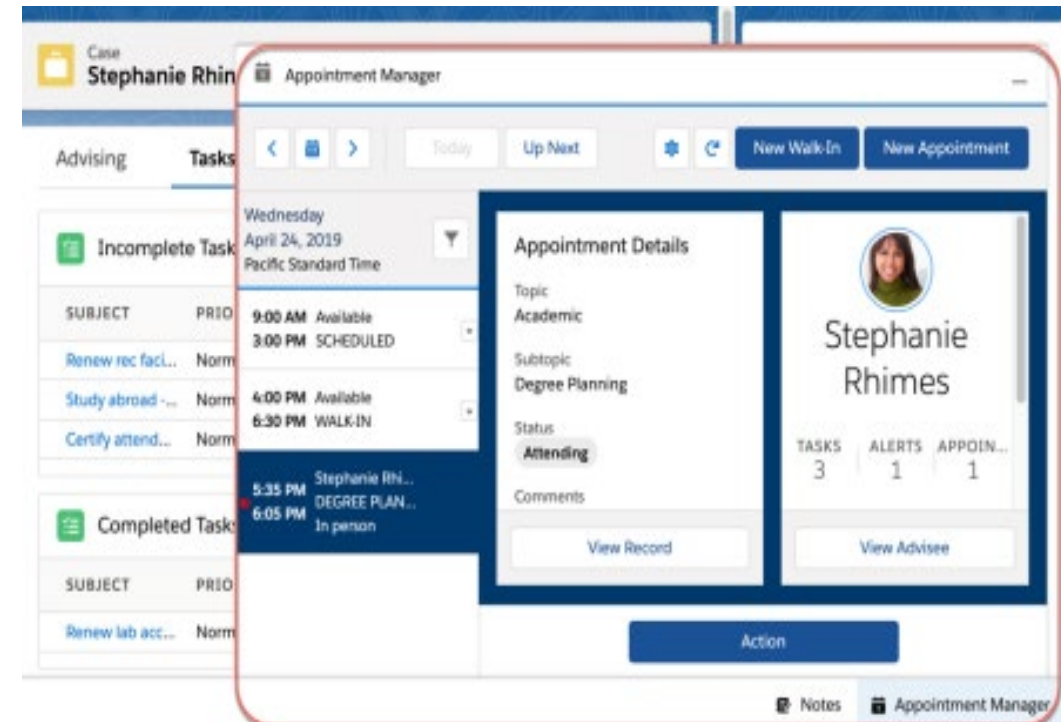
# Overview of CRM Capabilities, cont.

- ▶ Success Teams
  - ▶ Recruitment
  - ▶ Financial Aid
  - ▶ Success Navigators
  - ▶ Counselors
  - ▶ Instructional Faculty
  - ▶ Tutors
  - ▶ Program Staff, etc.



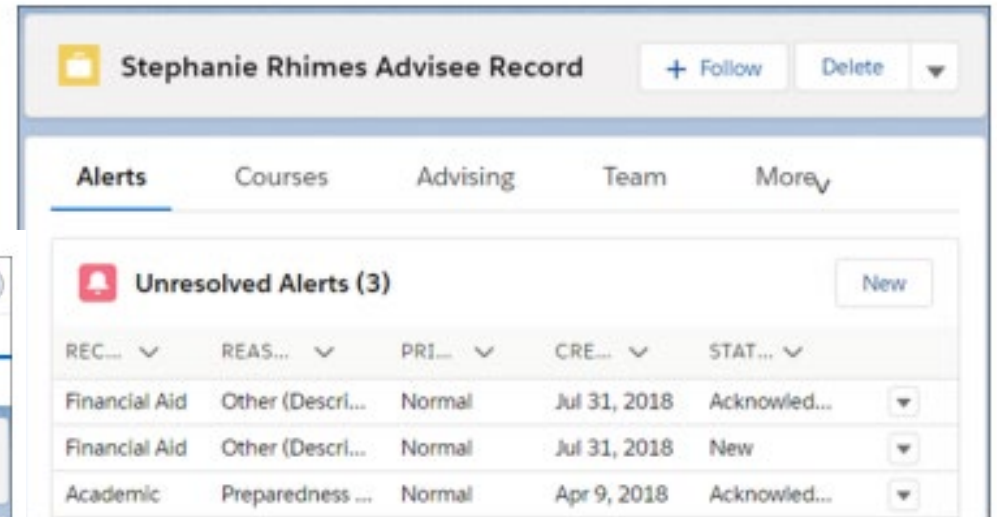
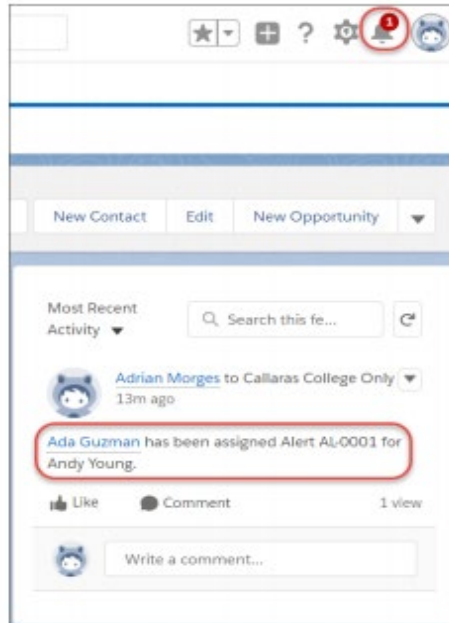
# Overview of CRM Capabilities, cont.

- ▶ Appointment Scheduling
  - ▶ Scheduled Appointments, Drop-In Appointments, Welcome Center Scheduling
  - ▶ Integration with Outlook/Google Calendars
  - ▶ Automated reminders to students



# Overview of CRM Capabilities, cont.

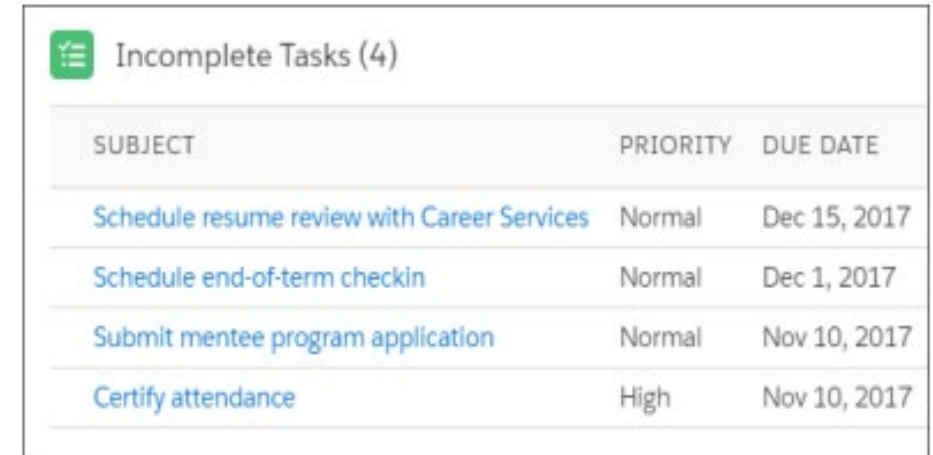
- ▶ Alerts (Proactive, Early, Post Term)
  - ▶ Systems Integration (Automated)
  - ▶ Manual Submission





# Overview of CRM Capabilities, cont.

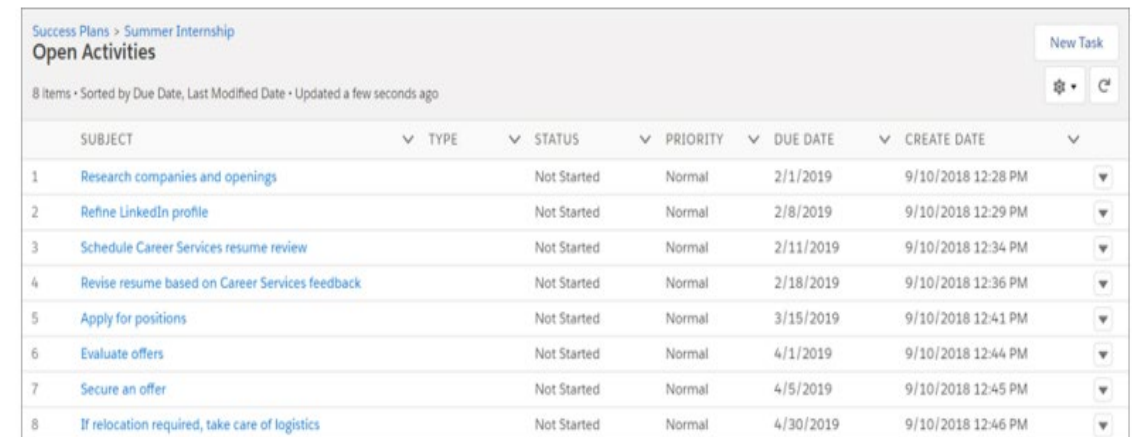
- ▶ Assign Tasks (Individual Tasks to individual students or groups of students)



A screenshot of a software interface showing a table titled 'Incomplete Tasks (4)'. The table has three columns: 'SUBJECT', 'PRIORITY', and 'DUE DATE'. It lists four tasks: 'Schedule resume review with Career Services' (Normal, Dec 15, 2017), 'Schedule end-of-term checkin' (Normal, Dec 1, 2017), 'Submit mentee program application' (Normal, Nov 10, 2017), and 'Certify attendance' (High, Nov 10, 2017). Each task is a blue hyperlink.

SUBJECT	PRIORITY	DUE DATE
<a href="#">Schedule resume review with Career Services</a>	Normal	Dec 15, 2017
<a href="#">Schedule end-of-term checkin</a>	Normal	Dec 1, 2017
<a href="#">Submit mentee program application</a>	Normal	Nov 10, 2017
<a href="#">Certify attendance</a>	High	Nov 10, 2017

- ▶ Create Success Plans (Multi Step goals)



A screenshot of a software interface showing a table titled 'Open Activities' under the heading 'Success Plans > Summer Internship'. The table has columns: 'SUBJECT', 'TYPE', 'STATUS', 'PRIORITY', 'DUE DATE', 'CREATE DATE', and a dropdown arrow. It lists 8 items, all with a status of 'Not Started'. The tasks include 'Research companies and openings', 'Refine LinkedIn profile', 'Schedule Career Services resume review', 'Revise resume based on Career Services feedback', 'Apply for positions', 'Evaluate offers', 'Secure an offer', and 'If relocation required, take care of logistics'. A 'New Task' button and settings icons are visible in the top right.

SUBJECT	TYPE	STATUS	PRIORITY	DUE DATE	CREATE DATE	
<a href="#">Research companies and openings</a>		Not Started	Normal	2/1/2019	9/10/2018 12:28 PM	▼
<a href="#">Refine LinkedIn profile</a>		Not Started	Normal	2/8/2019	9/10/2018 12:29 PM	▼
<a href="#">Schedule Career Services resume review</a>		Not Started	Normal	2/11/2019	9/10/2018 12:34 PM	▼
<a href="#">Revise resume based on Career Services feedback</a>		Not Started	Normal	2/18/2019	9/10/2018 12:36 PM	▼
<a href="#">Apply for positions</a>		Not Started	Normal	3/15/2019	9/10/2018 12:41 PM	▼
<a href="#">Evaluate offers</a>		Not Started	Normal	4/1/2019	9/10/2018 12:44 PM	▼
<a href="#">Secure an offer</a>		Not Started	Normal	4/5/2019	9/10/2018 12:45 PM	▼
<a href="#">If relocation required, take care of logistics</a>		Not Started	Normal	4/30/2019	9/10/2018 12:46 PM	▼



# Overview of CRM work thus far....

## PHASE 1: Recruitment and Marketing

- ▶ Recruitment Discovery & Creation
  - ▶ Process Maps
  - ▶ RFI Forms
  - ▶ Tour Requests

College of San Mateo

Request for Information

First Name

Last Name

Mobile Phone

Receive Texts?

Email

Area of Interest

Please select

--None--

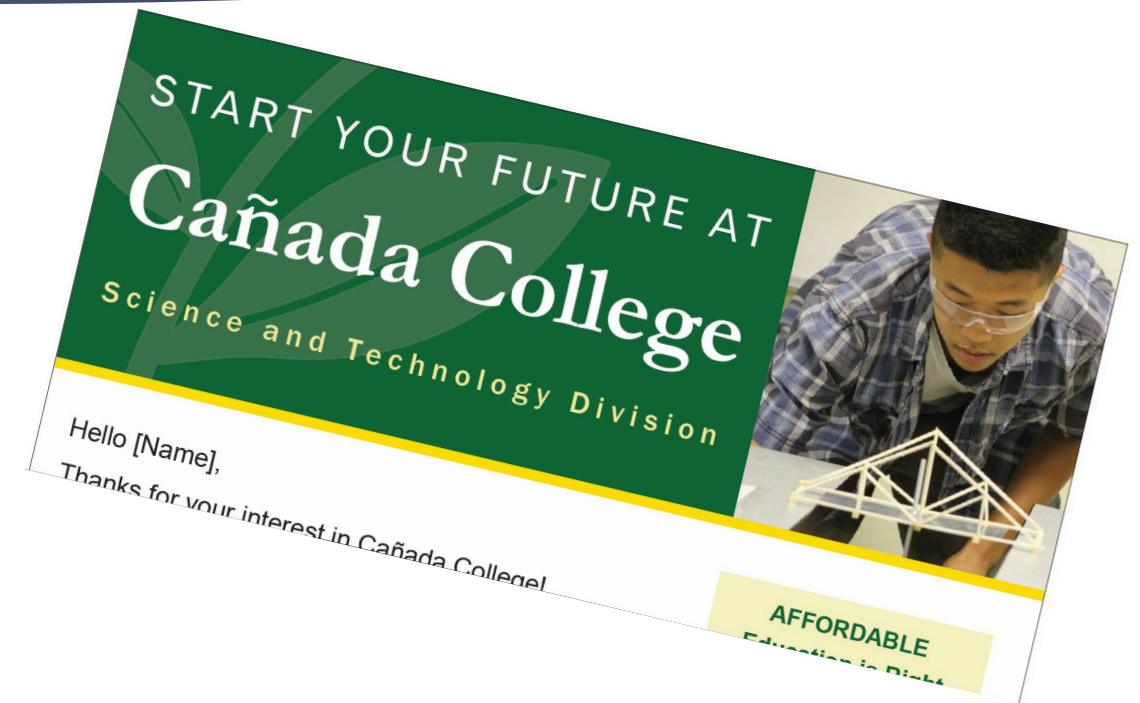
Submit

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# Overview of CRM work thus far....cont.

## PHASE 1: Recruitment and Marketing

- ▶ Marketing Discovery & Creation
  - ▶ Marketing Cloud
    - ▶ Communication Flows
    - ▶ Student Journeys

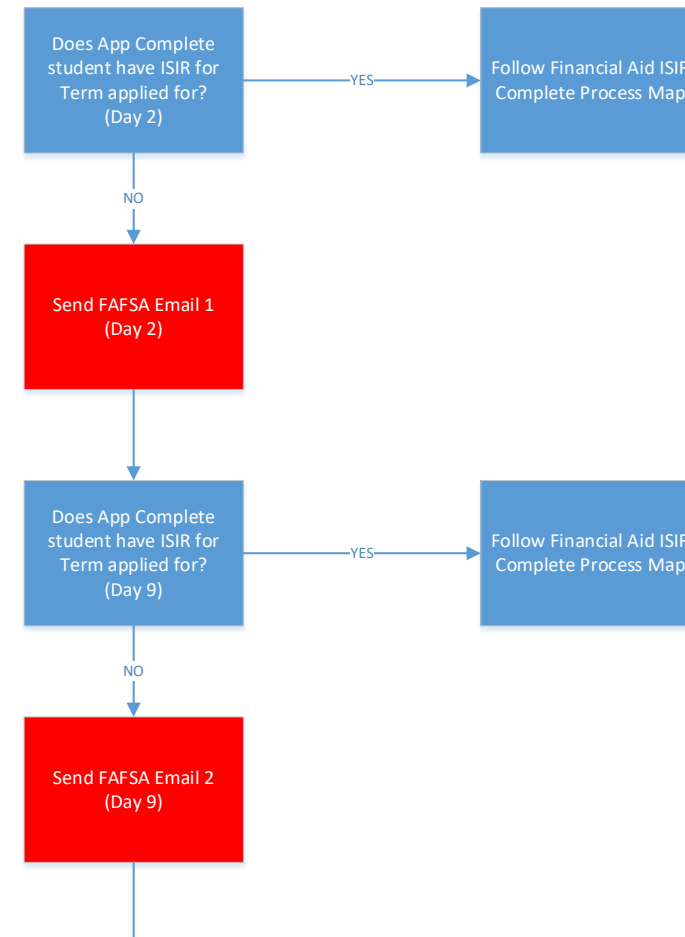


# Overview of CRM work thus far....cont.

## PHASE 2: Matriculation and Enrollment

### ► Matriculation Discovery & Creation

- Process Maps
- Financial Aid
- Residency
- Orientation
- Assessment/Placement
- Student Education Plan (Counseling Appt)



# Overview of CRM work thus far...cont.

## PHASE 3: Retention and Counseling

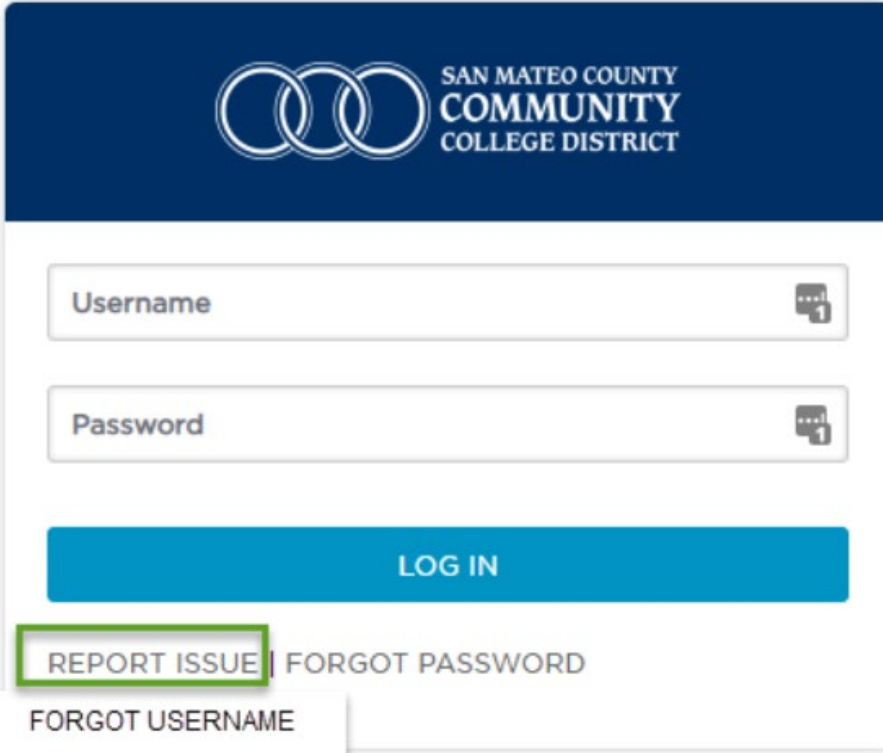
- ▶ Counseling Information Meetings
  - ▶ Counselor Data Dashboards
  - ▶ Working Sessions w/Instructional Faculty
    - ▶ Alerts w/Associated Tasks and Success Plans
- ▶ SARS/MIS Data Mapping (Appt. Types & Topics)
- ▶ Appointment Configuration

### ▶ Early Alerts:

- ▶ Grade Concern
  - ▶ Failure Concern
  - ▶ Missing/Late Assignment
  - ▶ Attendance Concern
  - ▶ Participation Concern
  - ▶ Preparedness Concern
  - ▶ Personal Concern
  - ▶ Career Exploration Needed
  - ▶ Recognition
- ▶ **NOTE:** There will be a comments section for each early alert submitted for the instructional faculty member to add comments about the alert.

# Overview of CRM work thus far...cont.

- ▶ MULTIPHASE: Data Integration
  - ▶ Banner:
    - ▶ CCCApply,
    - ▶ Matriculation Data
  - ▶ Canvas (Instructure)
  - ▶ DegreeWorks
  - ▶ Data Warehouse
  - ▶ Single Sign On (SSO)



The screenshot shows the login interface for the San Mateo County Community College District. At the top is a dark blue header with the college's logo (three interlocking circles) and the text "SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT". Below the header are two input fields: "Username" and "Password", each with a small icon of a speech bubble and the number "1" to its right. A large blue "LOG IN" button is positioned below the password field. At the bottom, there are three links: "REPORT ISSUE" (highlighted with a green border), "FORGOT PASSWORD", and "FORGOT USERNAME".



## **What is the ideal vision for Redesigning the College Process?**

To support the implementation of Guided Pathways and a Constituent Relationship Management (CRM) platform that improves the experience for a diverse range of students from pre-application/recruitment through program completion. The objective is for students to progress more directly toward their completion goal and promote more equitable outcomes among all of our students.

Objectives for Redesigning the College Process include:

- Improve Cañada's admissions application tool (CCCAppy) based on qualitative and quantitative data obtained from a comprehensive business process analysis, student usability feedback, Student Voices inquiry, PRIE and other stakeholders' input/feedback
- Design and implement a robust communication structure through the CRM that includes equity-centered language and inclusivity that is delivered to the student in their preferred modality and language (note: as an Hispanic Serving Institution, at minimum all English communications should be available in Spanish)
- Clarify and simplify the process of becoming and progressing as a Cañada student through the development of clear processes and pathways, tracking milestones, and ongoing support team-student engagement
- Improve the quality of data on our students and improve the college's use of our student data
- Identify and remove institutional structures and policies that impede the success of disproportionately impacted student groups including racially minoritized students

## **What is our definition of success?**

Redesign College Process is a multifaceted project that informs many different aspects of Guided Pathways. Below are some key standards of success for the different Guided Pathways workgroups.

To be successful, Early College Experiences should provide timely, culturally sensitive, and individualized information that address its different student groups (dual-enrolled, concurrent-enrolled, and Middle College). Conversely, it needs to collect feedback from students, with a focus on identifying sources of equity gaps. Finally, Early College Experiences needs to provide timely information about dual-enrolled, concurrent-enrolled, and Middle College students to all relevant college staff and faculty.

To be successful, Interest Areas and Program Maps must be easily understandable and engaging for all students. To judge the success of these objectives, regular data collection is necessary. Built-in student feedback tools within each platform could provide regular feedback, highlighting any common confusions and general needs for revision. Outreach events can provide more qualitative feedback on Interest Areas and Program Maps. Accordingly, Outreach events could provide more extensive guidance on improving the cultural responsiveness of the tools, from the general design to the specific language used in each tool. Finally, a process for reviewing all feedback and proposing revisions is needed, specifying who and when such reviews and proposals would take place.

The success of First-Year Experience and Redesign Academic Support require multifaceted communication and data collection plans. Each initiative/service requires advertising to students in empowering and culturally sensitive language while also being timely and easily accessible. Feedback on each initiative is needed in order to identify the need for new services, needed revisions to existing services, and needed revisions to the marketing of the services. Finally, there should be a process for feedback review of each initiative and proposing revisions, specifying how and when such reviews and proposed revisions would take place.

### **What is the role of Success Teams, Retention Specialists, and Data Coaches?**

Success teams require timely and efficient coordination among a range of college employees. Each role needs to be clearly defined with easily accessible information to train and remind team members of their responsibilities. Retention specialists (consider calling them success coaches?) have a key role in guiding Success Teams' overall objective of improving student completion. Data coaches have a key role ensuring that each team member has access to and knows how to use all relevant information about our diverse students. Finally, there should be a process for reviewing and improving success teams' efforts. This should include periodic monitoring of other college's Success Team models, such as the idea of "democratized data."