



INSTITUTIONAL EFFECTIVENESS PARTNERSHIP INITIATIVE

Participate | Collaborate | Innovate

Institutional Effectiveness Partnership Initiative Advisory Committee Sheraton Grand Sacramento July 19, 2017, 9:30 am-2:30 pm Meeting Summary

Members in Attendance

Last	First	Primary Wkgrp*	Last	First	Primary Wkgrp*
Adams	Julie	PD	Johns	Krista	NA
Arballo	Madelyn	Ind	Johnson	Joyce	PD
Bandyopadhyay	Santanu	PD	Lamanque	Andrew	PPP
Barton	Michelle	Ind	Lamb	Eric	PPP
Beach	Randy	Ind	Lee	Matthew C.	TA
Bruno	Julie	PD	Leong	Tim	PD
Burke	Kathleen	TA	McKay	Conan	PD
Coleman	Laura	Ind	Messina	Kimberlee	TA
Dozier	Julia	PD	Meuschke	Daylene	Ind
Eikey	Rebecca	PPP	Michaelson	John	Ind
Fried	Sandy	PD	Pasricha	Isha	TA
Garcia	Valentin	TA	Roberson	Carrie	PD
Greaney	KC	Ind	Sandberg	Mary	PD
Gribbons	Barry	Ind	Skinner	Erik	Ind
Hastey	Brent	PD	Sokenu	Julius	TA
Hayward	Craig	Ind	Stanskas	John	Ind
Heyman	Jeff	TA	Stoup	Gregory	Ind
Jaffe	Louise	Ind	Tena	Theresa	PPP
Jarrell	Paul	TA	Wah	Linda	PPP

Resource Persons/Evaluators in Attendance

Last	First	Primary Wkgrp*	Last	First	Primary Wkgrp*
Bell	Autumn	PD	McNeice-Stallard	Barbara	PPP
Bianchi	Rico	PD	Milan	Theresa	Ind
Collins	Linda	PD	Nguyen	Alyssa	
Cooper	Darla		Pacheco	Robert	TA
Cox-Otto	Pamela	NA	Purnell-Mack	Rogear	
Dettman	Sarah	NA	Ramirez-Faghih	Caroline	Ind
Fischerhall	Chase	TA/PD	Rodriguez	Mario	Ind
Fuller	Ryan	Ind	Schrager	Cynthia	PD
Harrington	Deborah	PD	Slimp	Ronnie	PPP
Howe	Michael	PPP	Spano	Jeff	PD
Jez	Su Jin	PD	Trimble	Brad	PPP

Last	First	Primary Wkgrp*	Last	First	Primary Wkgrp*
Johnson	Catherine	Ind	Ward	Teresa	PD
Larson	Erin	PPP	Wutke	Kevin	NA
Madden	Sean	NA			

Guests in Attendance

Last	First	Primary Wkgrp*	Last	First	Primary Wkgrp*
Berliner	Rachel	PPP	Levy	Rita	PD
Dadgar	Mina	Ind	Metune	Laura	NA
de Anda	Rosa	PPP	Tyson	Sarah	Ind
Hoig	Todd	Ind	Urbano	Juan	PPP
Kretz	Andrew	PPP			

*Wkgrp: Ind = IE Indicators; PPP = Policy, Procedure, and Practice; PD = Professional Development; TA = Technical Assistance

I. General Session 1

- A. Krista shared an Education Moment.
- B. Matthew welcomed the new members, who briefly introduced themselves.
- C. Matthew asked members to engage in a brainstorming session at their tables on the following topic: Members' "ideas on how best to improve the general presentations IEPI makes annually on the overall nature, purposes, and impacts of IEPI. What would increase the likelihood that colleagues at your own home institution would a) attend the presentation, and b) come away from it with a richer understanding of IEPI?" After table discussions, Kimberlee, Randy, Tim, and others shared some ideas. The forms on which members wrote their ideas were collected, and will be tabulated and shared with the core group of presenters as they prepare for the next round of presentations.
- D. Theresa introduced the recently issued Foundation for California Community Colleges document, *Vision for Success: Strengthening the California Community Colleges to Meet California's Needs*. She noted that members can go to the Board of Governors agenda to get a copy of the report, which reflects input from over 500 virtual town hall participants, among others. This document will be the Chancellor's Office's roadmap for the next five years, and the CCCCO sees Guided Pathways as a primary mechanism to realize the goals and commitments that it sets forth. She concluded her remarks by saying that we stand at a unique moment in time, with resources available to braid across a number of initiatives, and that the IEPI Advisory Committee will be critical to getting things right.

II. Workgroup Sessions

A. Institutional Effectiveness Indicators (Barry)

1. California Guided Pathways KPIs demo – Kathy Booth
 - a. The Pathways tab in Launchboard allows colleges to filter by First-Time Ever and students who were previously concurrently enrolled or started in the summer before the fall term.
 - b. The tool provides the ability to filter by Race/Ethnicity, Gender and Age.
 - c. KPIs for Pathways in Launchboard include: Earned 6 units in first semester, 15 units in first year, and completed college-level/transfer-level English and Math.
 - d. Barry added that the definitions are varying slightly with different groups and drifting apart from each other. We need to make sure they are aligned.
 - e. Adding historical trends and statewide trends.
 - f. Momentum points are all first year.
 - g. Consider backwards-mapping key indicators between Year 1 and Year 2 and indicators of work-based skills as outcomes.
 - h. We should consider measures for non-first time students, older students and displaced workers.
 - i. Kathy will send a list of prioritized metrics to Barry for distribution.
2. Data visualization examples, especially with Student Equity or Pathways
 - a. Reviewed data visualizations from the March meeting to help inform RFP process being led by the CCC Foundation.

- b. James Todd shared a visualization from Modesto.
 - c. KC Greaney shared a visualization from Santa Rosa.
 - d. Barry Gibbons shared a visualization of COC Enrollment Management and Program review, and a Heat Map visualization.
 - e. It's important to be mindful that some districts may not have the resources to develop these visualizations.
 - f. The foundation will put together an RFP to make an acquisition and has gathered data from a survey but have additional questions and will send out another survey shortly.
 - g. John Stankas recommends talking to the chief instructional officers as well as the smaller districts.
3. Implications of Strategic Vision Goals (Erik Skinner)
 - a. This is a call to action for CA to meet economic and social gaps.
 - b. The goal is to increase completions by 20%, transfers by 30% in the next 5 years.
 - c. CCCCCO will now work on action plans. One implication will be the indicator metrics.
 - d. How will the Strategic Vision goals be integrated with IEPI?
 - e. Erik stressed that these identify core commitments – one that data should be used to inspire change. These are not punitive, which is in alignment with IEPI values.
 - f. Barry added that we should look at the alignment of college goals and the goals in the new Strategic Vision.
 4. Strong Workforce Program (SWP) Incentive Funding Model Overview – Kathy Booth
 - a. Handout on metrics explaining funding model for different phases of implementation.
 - b. Barry added that some of these metrics are not leading indicators but more long-term indicators.
 - c. The Performance Based Funding 2.0 is a points system that allows colleges to better benefit by getting credit for students along the path.
 - d. Funding for 17% is outcomes-based as it evolves across phases (see handouts).
 - e. MIS, CTEOS and EDD are the only data sources.
 - f. There will be a special tab within Launchboard.
 - g. We need to encourage conversations about data and connections to other data like SSSP, IEPI, Scorecard, and ACCJC.
 - h. We need to look at points-based system for CCC bachelor's degree programs.
 - i. There are some efforts to stabilize the funding by adjusting numbers only every four years, which is going through a legislative approval process.
 5. Next meeting September 15, 2017
 - a. Discuss implications of Pathways data tab in Launchboard with the IEPI indicators.
 - b. Analyze where there's overlap and divergence in indicator system.
 - c. The committee will bring back ideas for visualizations.

B. Technical Assistance Process (Matthew)

1. The two new members introduced themselves: Student Senate rep Isha Pasricha and CCPRO rep Jeff Heyman. Chase Fischerhall of Career Ladders also attended.
2. Members shared some follow-up comments on the brainstorming session.
3. Matthew walked the group through the current status of PRT Cycles, including Mini-PRTs and the PRT COP.
 - a. The initial COP meeting will be in Redding on Dec. 6-7.
4. Discussions of PRT Process evaluation reports will resume in the meeting of Sept. 15.
5. Potential TA Enhancement Ideas from the Executive Committee Retreat
 - a. Members discussed the ideas for TA enhancements that arose at the Executive Committee retreat, June 26-27, 2017
 - i. Kimberlee suggested providing help to get ahead of the Guided Pathways (GP) needs. Chase indicated that Career Ladders had long experience in helping set up GP, and described briefly what they had learned from one such project. Matthew noted that at this point, GP assistance appeared to reside mostly within Professional

- Development's purview, with possible follow-up by technical assistance teams, perhaps along the lines of the PRTs.
- ii. Julius and others liked the idea of the initiatives "boot camp."
 - iii. Members would have liked more clarity on the functions and relationships implied by the term "focused coaching," and worried that assistance under that label might be viewed with more suspicion than are PRTs. Such coaching, housed in the CCCCO, should fit into a revision of the menu of options for technical assistance originally developed in this group in May 2016. Coaching can be longer-term, as well as more available on short notice, for example via the telephone. We do not have the capacity for more than 15 new PRTs each semester, and a coaching system might help meet the institutional needs that exceed that capacity.
 - iv. Bob noted that the assumption that filling knowledge gaps will do the most to improve institutional effectiveness is not necessarily valid: There are often motivation gaps and structural gaps as well, and coaching could help fill those. Paul pointed out that the issue is more often will and capacity than knowledge per se. Bob recalled that one PRT client appreciated the PRT as a "deep bench" in assisting the institution to move forward.
 - v. Returning to GP, Matthew observed that different college will start at and reach different levels of implementation and effectiveness. Kimberlee asserted that the money that comes from the state often forces silos, and attempted implementations of GP will run up against those silos. Val suggested that truly integrated planning can still reduce silos, even given funding mechanisms.
- b. Matthew asked the group their opinion of recruiting non-CEOs as PRT Leads. After discussion, the consensus was that if the client's Areas of Focus are narrow, such that the expertise of, say, a CBO or CIO is a great fit for them, and if the client CEO approves, a non-CEO could be an excellent Lead. However, that should be an exceptional occurrence, rather than a common one.
6. Members walked through portions of the two online Applied Solution Kits (ASKs) that are now available. The following are highlights of their observations:
- a. Having the audio track and the text on the screen identical struck members as unnecessarily duplicative.
 - b. One suggestion was a set of two-minute videos, each hosted by a talented presenter.
 - c. Members desired practical, concrete examples of steps to take (e.g., revise mission and vision statements before updating major plans).
 - d. Onscreen graphics that one would expect to be hyperlinks were not; it was necessary to go back to prior pages to find the applicable link.
 - e. Forcing users to download linked items (e.g., literature review) struck members as unnecessarily clunky. A warning of the length of the download would be useful.
 - f. The content of the Integrated Planning (IP) video was good, but too basic for many prospective users, and the presentation did not have the high quality one would expect.
 - g. Examples of the logic models were useful.
 - h. Navigation of the IP site is problematic for use by PRTs: PRT members would have to click on every single item to know what would be useful for the client. A means of identifying the specific links most useful for PRTs would be helpful. The site does not provide a framework suitable to facilitate institutional use, either.
 - i. The Integrated Planning Process Improvement Guide looks promising for PRT use.
 - j. Members found the Data Disaggregation site much more accessible, and particularly liked the designations for beginner, intermediate, and advanced users.
 - k. Members suggested that analysis of the site analytics would provide some guidance on what features and content users were finding most helpful or engaging.

C. Professional Development (Jeff)

1. Professional Development Evaluation
 - a. EdInsights compiled data looking at which of IEPI's four goals are being targeted by their workshops (as identified by conference providers and IEPI staff) and which of the four goals are usefully addressed by the workshops (as identified by conference attendees after-the-fact).
 - i. There is a positive correlation between how strongly a workshop targets a goal and how useful attendees find that workshop in addressing it. Workshops are effectively helping with the goals that they set out to address.
 - ii. IEPI workshops have heavily targeted student outcomes and, to a lesser degree, programmatic compliance. There has been very little targeting of accreditation and audit sanctions or fiscal viability.
 - b. The data on usefulness is based on self-reporting of attendees. There are plans to conduct follow-up surveys 6-12 months after workshop, as well as doing deeper dives with select institutions, in order to discern whether there are real-world results.
 - c. There was interest in discussing a theory of action for PD going forward in the next meeting: what short-, mid-, and long-term outcomes would we like to see from PD and how do we get there?
2. Professional Development Workshop Effective Practices
 - a. EdInsights also compiled a "Checklist of Successful Practices" for IEPI workshops.
 - b. IEPI hopes to use the checklist to develop a handout to give to conference providers that has successful practices that best capture "the IEPI way" of doing a workshop.
3. Overcoming the challenge of colleges submitting promising practices to the PLN
 - a. There was a very brief session in which ideas for increasing submissions to the PLN were brainstormed. Suggestions included:
 - i. Simplify the submission form (already in progress).
 - ii. Get resources from various conferences, and have staff ready to fill out the form on behalf of presenters/conference organizers.
 - iii. Reach out to award-winning programs, including those who were nominated but did not win.
 - iv. Find resources posted on the websites of statewide organizations.

D. Policy, Procedure, and Practice (Theresa)

1. Joint meeting with PD Workgroup
 - a. Sandy Fried provided overview of Chancellor Oakley's "Vision for Success" report. Went over the six goals outlined in the report. Emphasized the report's focus on Guided Pathways. Report can be found on and downloaded from the Foundation for California Community Colleges website.
 - b. Andrew Lamanque provided brief history of evolution of the ASKs and why they came to be. ASKs can be found on the Professional Learning Network (PLN).
 - c. Theresa Tena introduced Brad Trimble to the group. Brad explained his role as ASK Coordinator with RP Group. RP Group is currently working with Design Media to better structure the ASKs as they exist on the PLN.
 - d. Question re Guided Pathways ASK and Guided Pathways Advisory Committee. Answer is that there will be both an ASK and an advisory committee.
 - e. Question re existence of mechanism for creating more ASKs. Answer is that yes, there is such a mechanism in place.
 - f. Question re how IEPI fits into "Vision for Success" report. IEPI has always worked towards what the report is advocating.
2. ASK Project updates
 - a. Current
 - i. Data Disaggregation (DD)
(A)Phase 3 will be about maintenance. See handout for details.

- (B) Upcoming workshop in Burlingame on 10/13 at the tail end of the RP Strengthening Student Success conference.
- (C) Upcoming virtual workshop for Far North campuses on 9/15 (Shasta, Lassen, Lake Tahoe, Feather River, and Siskiyou).
- ii. Integrated Planning (IP)
 - (A) Phase 3 will be about integrating IP ASK with other ASKs. See handout for details. Barbara McNeice-Stallard invites group to join IP Advisory Committee. Survey that went out in the spring was very successfully received; lots of quality feedback.
- iii. Strategic Enrollment Management (SEM)
 - (A) Phase 2 will see expansion of SEM ASK team plus build-out of resources. Guided Pathways should be driving force behind SEM, states Michelle Barton. See handout for details.
- iv. Guided Pathways (GP)
 - (A) Self-assessment and multiyear planning template in development with CCCCCO, Career Ladders Project, ASCCC, and RP Group. GP touches everything and is cross-functional. Seven workshops to convene between end of September and end of October. Faculty are critical to successful GP implementation. Nationwide AACC and CA GP Project work will help the Chancellor's Office to move forward with its Awards Program. We must design the GP ASK with the end in mind. We must keep students at the very center of this work.
- v. Change Leadership (CL)
 - (A) This newest ASK, still in an early stage of development, was born out of need for leadership development resources. Keren Stashower is still in the gathering phase, determining what we already know about the CCCs and what we still need to know. An advisory committee has been put together and will convene for the first time at the end of July. There will be a conference in October, and a summit next spring. Laura Hope, the new Executive Vice Chancellor of Educational Services at CCCCCO, will chair the Change Leadership Advisory Committee.
- 3. Guided Pathways Award Program updates [RAN OUT OF TIME; DID NOT DISCUSS]
 - a. Communications
 - i. Fliers
 - ii. Video
 - iii. Website
 - (A) FAQs
 - b. Self-assessment tool and multi-year planning template
- 4. Communications
 - a. Observation made that communications, especially internal communications, are so vital to making Guided Pathways and the ASKs in general a success. Communications serve to create momentum and garner buy-in.
 - b. Many of today's handouts were created by Interact. These materials have been vetted, and will undergo further revision tomorrow (7/20). Final version of the GP video with faculty to be released late July. It is now time to go beyond traditional messaging for IEPI. LinkedIn campaign in development. Focus groups to identify GP challenges at different types of CCCs (North, South, rural, urban). Intent is to follow up with focus group participants using ongoing survey (mix of qualitative and quantitative).
- 5. Review Charter (attached)
 - a. The charter was written in January 2015. Our P3 workgroup has focused over the last year and a half on the ASKs with some conversation about accreditation and policy matters. Theresa Tena will be stepping down from her co-chair role after this meeting; she will flit from workgroup to workgroup going forward. Stacy Fisher will be the new P3 co-chair. Rebecca Eikey will replace Ginni May as the other P3 co-chair. Discussion re ASKs will

likely be shifted to PD workgroup. The P3 charter might need to be tweaked as the workgroup evolves from this point forward.

6. Impact of Strategic Vision report [DID NOT DISCUSS]
7. Possible Collaboration with ACCJC
 - a. ACCJC handout explained. Partnership with ACCJC was a discussion item at IEPI Executive Retreat in late June. Potential areas of collaboration listed are just a start—the product of a brainstorm session.
 - b. Suggestion made that CCCCCO pay folks to be trained to serve on accreditation teams for ACCJC.
 - c. Observation made that colleges do not sufficiently understand ACCJC standards and expectations.

III. General Session 2

- A. Barry, Matthew, Jeff, and Theresa shared highlights of their respective Workgroup sessions (see above).

IV. Adjournment