

# ECAR Integrated Planning and Advising Services Benchmarking Study

## Project Overview

Renewed emphasis on student progress and degree completion is driving higher education to take a fresh look at services that promote student success. With support from the Bill & Melinda Gates Foundation, ECAR is contributing to this effort with a study investigating integrated planning and advising services (IPAS).

IPAS is an institutional capacity to create shared ownership for educational progress by providing students, faculty, and staff with holistic information and services that contribute to the completion of a degree or other credential. It encompasses services that help students formulate and advance toward educational goals, including advising, counseling, progress tracking, and academic early alerts. Among other things, IPAS technologies can document and track students' educational plans, improve data analysis, offer self-service resources that reduce advisor workloads, and trigger interventions based on student behavior or faculty input.

Our research objectives are to:

- Characterize IPAS capabilities and needs from institutional and stakeholder (CIO, administration, faculty, advisor, student) perspectives;
- Measure adoption and use of IPAS-related technologies among our study group;
- Identify best practices in the selection and deployment of IPAS systems; and
- Develop actionable recommendations that help higher education leaders successfully plan, implement, and assess IPAS initiatives.

## Research Methodology

ECAR will work closely with a group of institutions whose engagement in student success efforts suggests that they have IPAS-related experience and insights to share. Because they often face the greatest planning and advising challenges, community colleges will constitute two-thirds of the participants, and institutions of other Carnegie classes will make up the remainder. Participating institutions will be screened for markers of student success activity, such as high leadership priority for improving success measures, advanced use of analytics to track student progress, implementation of IPAS applications, or recognition from student-success award programs.

With participant input, ECAR will develop and conduct a survey about IPAS practices that will be answered by two officers at each institution: the CIO or his/her delegate,

and the officer responsible for undergraduate student success efforts (typically the VP of academic affairs or student affairs, or a direct report).

In addition, to elicit stakeholder insights, ECAR will conduct focus groups organized by role and including participants from multiple institutions. We plan six role-based focus groups of five to eight participants each. There will be two focus groups combining CIOs and student success officers, two for staff and faculty advisors, and two for undergraduate students. A separate multi-role group will assist with survey design. Participant feedback may lead to some changes in these plans.

### **Participating Institution Commitments and Incentives**

Each participating institution will be asked to:

- Name a liaison with whom ECAR can coordinate study activities;
- Commit to IPAS survey responses from the CIO and student success officer; and
- Arrange for up to four (probably fewer) institutional community members to take part in role-based focus groups or in a multi-role group dedicated to survey instrument design.

Focus groups will be conducted online and will take no more than 90 minutes of participants' time.

In return, besides early access to findings, each institution will receive one complimentary registration to the EDUCAUSE 2013 Annual Conference, and each focus group participant will receive a \$100 honorarium.

### **Timeline**

- Inform ECAR of intent to participate: Late June to early July 2013
- Organize and conduct focus groups: July through August 2013
- Develop and test survey instrument: August through mid-September 2013
- Survey in field: Late September 2013
- Preliminary results available: Early October 2013
- Final report, supporting materials: Mid-February 2014
- IPAS maturity index: Mid-March 2014

### **Research Team**

The ECAR IPAS study team will be Ron Yanosky, Senior Research Fellow and principal investigator, and Susan Nesbitt, Research Administrator. Inquiries and comments about the study can be directed to [ryanosky@educause.edu](mailto:ryanosky@educause.edu).