BETTER PARTNERSHIPS, BETTER RESULTS

Using Short-Term Action Cycles to Accelerate Progress on Cross-Institution Transfer Improvement Efforts

SOVA

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Sova's mission is to help America fulfill its social contract to provide real upward mobility for more people through higher education. Anchored in a commitment to improving the lives of working people, Sova works shoulder to shoulder with researchers, policymakers and institutional leaders at all levels to close equity gaps in opportunity and outcomes for today's learners. Sova works to accelerate the pace and improve the quality of complex problem solving, and it pursues its mission through distinctive approaches to will-building, strategic planning, change leadership, and process improvement.

Acknowledgments

The author of this work would like to thank The Charles A. Dana Center for their leadership of the Transfer Partnership Work in Texas that led to the creation of this toolkit, as well as Janie Valdés of Florida International University and Julie Alexander of Miami Dade college for their participation in the featured case study. The author would also like to thank Juana Sanchez and Lara Couturier from HCM Strategists for the leadership of the Tackling Transfer work in Texas, and Gelsey Mehl and Heather Adams of the Aspen Institute for their support in advancing the design and publication of this brief.

The Tackling Transfer work is made possible by the generous support from Ascendium, ECMC Foundation, Joyce Foundation, and the Kresge Foundation.

We are also grateful for the national, state, and institutional transfer leaders who generously shared their time, insights, and experiences for the development of this report.

Introduction

Short-term improvement cycles, pioneered for public purposes and developed over time by the Carnegie Foundation and the Institute for Health Care Improvement, are commonly used in a variety of settings inside and outside higher education. Sova works with community colleges and their four-year transfer partners to use simplified 90-day improvement cycles to make progress on tough challenges that negatively impact transfer students. This guide provides an overview of the core elements of short-term improvement cycles, and includes tips and tools to help transfer partners use this approach to accelerate problem-solving for transfer student success.

Why Use an 'Improvement Approach' to Work on Transfer?

A core premise of improvement science is that large, complex problems can and indeed must be broken down into 'bite-size' pieces. To accelerate progress and improve the quality of problem solving, long-term goals and nearer-term S.M.A.R.T. goals can be broken down even further into the most important work that needs to be done right now. When institutions adopt this approach and have the right people at the table to carry out rapid improvement cycles, they can accomplish a lot in a short period of time.

What are the Key Elements of a Short-Term Improvement Cycle?

There are two key elements of our modified approach to designing short-term cycles for transfer improvement work: driver diagrams & 90-day plans. Using driver diagrams to structure conversation about the most important challenges and opportunities for collaborative work can help institutional teams go deeper faster into real work. Using 90-day plans to turn driver diagrams into action plans provides a structure to push work forward and keep teams on the same page. By providing a minimally rigid project management structure, short-term improvement cycles help team members hold each other mutually accountable for making progress on shared priorities.

How We Got Here

In 2019, through their participation in Tackling Transfer, the Charles A. Dana Center and the Texas Transfer Alliance selected 26 Texas higher education institutions to participate in a one-year project structured around the use of short-term improvement cycles to remove barriers to seamless transfer for baccalaureate-seeking community college students.

Participating institutions worked on a variety of partnership-improvement projects focused on topics related to:

- Aligning degree requirement policies between colleges and universities to reduce lost credits
- Improving implementation of math pathways and the completion of 'gateway' mathematics and its applicability in transfer
- Promoting transfer-affirming and transfer-receptive practices in recruitment, advising, and support of transfer students.

The sample driver diagrams included in this toolkit were collaboratively developed with the Dana Center as examples for participating institutions to consider as they examined their own data and chose a short-term project aligned to S.M.A.R.T. aims and the longer-term goal of dramatically improving outcomes and equity for baccalaureate-seeking community college students. For a deeper overview of the Transfer Partnership Strategy project see the May 2020 Emerging Solutions brief.

Driver Diagrams

A Good Driver Diagram...

- ☐ forces delineated articulation of key challenges
- ☐ serves as the theory of action to guide the creation of an effective short-term (90-day) work plan
- ☐ helps translate a high-level goal into a logical set of underpinning activities or projects
- ☐ captures the scope of leading challenges in a snapshot
- ☐ helps teams establish shared understanding about the work to be done

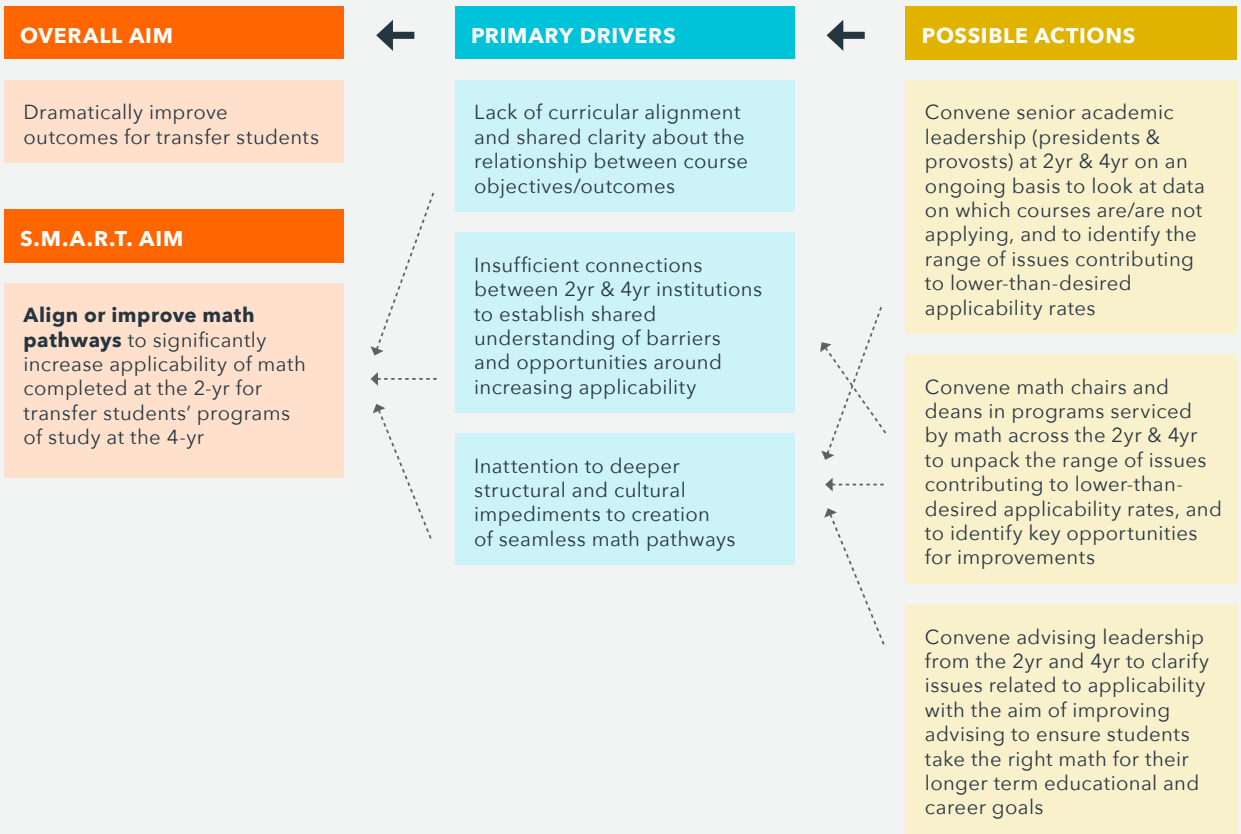
Guiding Questions

1. What is the existing condition that needs to be improved?
2. What's the evidence that tells us it needs to be improved?
3. What are the root causes or core drivers of the challenge we want to make progress on?
4. If our long-term goal is to dramatically improve outcomes for transfer students while closing equity gaps, what is the most important three-year S.M.A.R.T. goal we can set for ourselves?
5. What are the most important things we should be doing in the near term to make progress toward our S.M.A.R.T. goal?

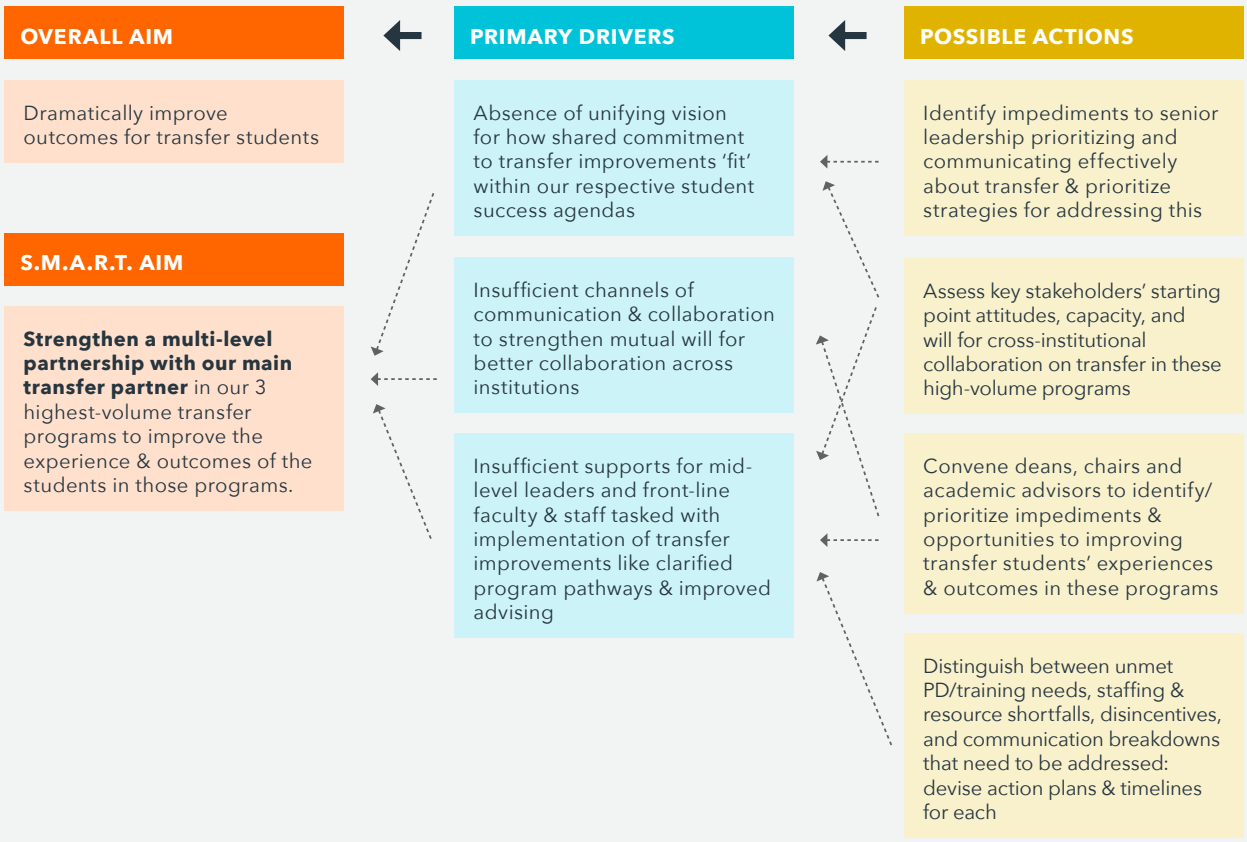
Examples of Driver Diagrams

Created in Partnership with the Charles A. Dana Center

Example #1



Example #2



From Driver Discussions to Short-Term Improvement Planning

Building 90-Day Cycles

90-day cycles provide a structure for learning, doing, and improving. They also provide a project management ethos, intentionality, and accountability for project teams.

Short-term improvement plans work best when kept simple, with manageable and realistic goals. When run properly, they accelerate complex work by forcing early learning and allowing for, and encouraging comfort with, mid-course corrections.

The ideal use of 90-day cycles is on an ongoing basis with one or two week reset period between the cycles.

A Good 90-Day Plan...

- ☐ forces articulation of the relationship between the S.M.A.R.T goal & the near-term goal (requires next steps)
- ☐ is clear-eyed but ambitious, grounded in data, focused on the most important work (not just good work)
- ☐ includes careful consideration of both technical & adaptive dimensions of improvement
- ☐ includes deadlines, responsibilities, and owners of tasks
- ☐ helps teams establish shared understanding about the work to be done and hold each other accountable for progress

Guiding Questions

1. What do we want to accomplish in the next 3 months?
2. How will this contribute to our S.M.A.R.T goal?
3. How will we know if we're successful?

30	Activities	Owners	2yr Needs / Implications	4yr Needs / Implications	Due Date	Status
60	**Activities**	**Owners**	**2yr Needs / Implications**	**4yr Needs / Implications**	**Due Date**	**Status**
90	**Activities**	**Owners**	**2yr Needs / Implications**	**4yr Needs / Implications**	**Due Date**	**Status**

See Appendix for 90-Day Cycle Action Planning Worksheet

Finalizing 90-Day Plans

Critical Questions that Need Good Answers

The 90-day plan template is very straightforward, yet it requires diligence in ensuring every category is addressed. In addition to outlining the most important activities to be taken on over the course of three months, 90-day plans must include attention to the various implications and needs around the activities.

For example, data needs or implications with respect to stakeholder engagement are critical considerations. Deadlines and task owners must be established, even as timelines may change as a result of early learning. Task owners must be empowered to hold team members accountable for progress on agreed upon activities, and the overall plan should be aligned with the day-to-day workflow of team members. The following checklist of critical questions should serve as the framework for finalizing a 90-day plan:

1. Are we clear about what specifically we want to accomplish in the next three months?
2. Are we sure that what we're planning to do is the most important thing we can be doing to make progress on our shared S.M.A.R.T. goal?
3. Whose input & support is essential for our progress, and have we captured this information in the 'needs & implications' section of the 90-day plan.
4. Do we have people assigned to action items and a plan for engaging our wider teams and individuals implicated in the 90-day plan?
5. Have we agreed on when/how the teams will come back together, and have we scheduled all of our check-ins at the 30-, 60-, and 90-day marks?

What Excellence Looks Like

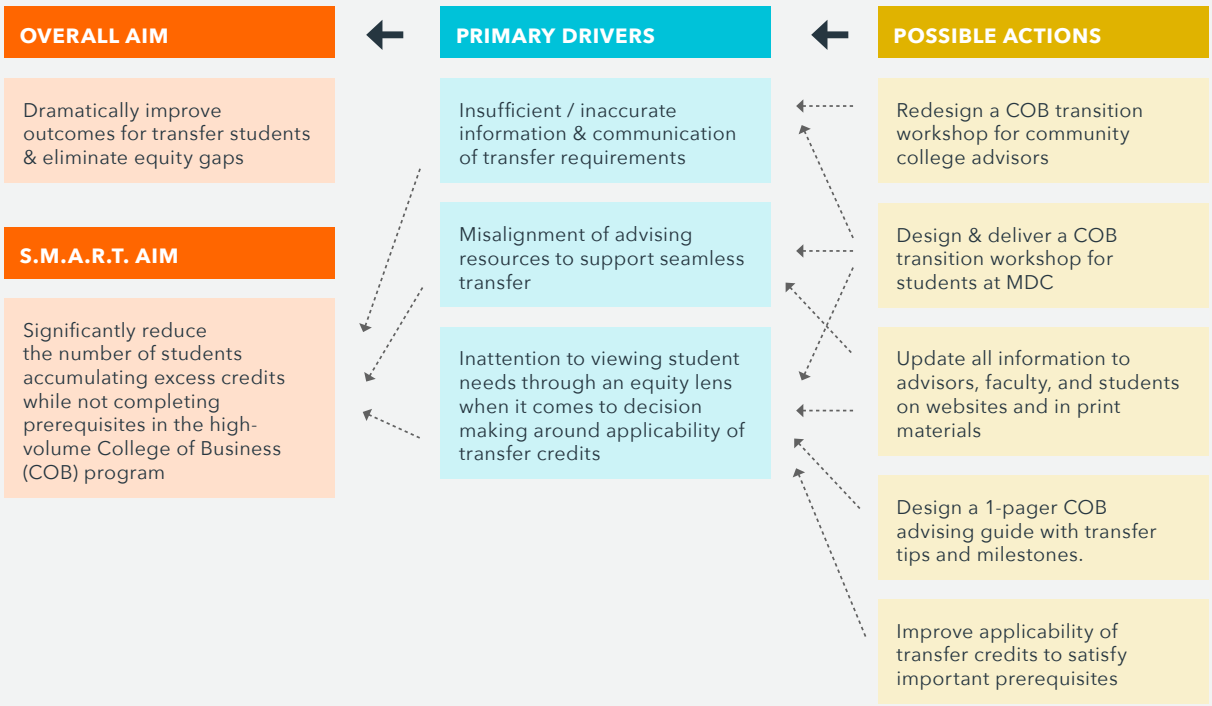
A Case Study

Compared to many institutions, Florida International University (FIU) is ahead of the game when it comes to effectively serving transfer students. Guaranteed admission, joint events, advising by FIU Bridge Advisors housed at the three largest-sending partner colleges, and the issuance of an FIU student ID card all "affirm that a seat is waiting" for community college transfer students. And once students transfer, robust supports are in place to ensure they maintain and deepen their sense of belonging and purpose at FIU. The Connect4Success program at FIU is a nationally recognized transfer pathway that emphasizes that success is co-owned by FIU and its transfer partners.

As a public Hispanic- and minority-serving institution, FIU has engaged in a range of efforts to understand and close equity gaps, expand Black and Latinx student participation in STEM programs, and promote a culturally responsive environment for students by engaging in ongoing, deep listening to students themselves. But even for a university with such a robust track record promoting transfer student success, and in a state with significant policy efforts aimed at improving transfer, FIU and its partner colleges still face a host of complex challenges in ensuring transfer student success. When provided with the opportunity to participate in a short-term improvement cycle through the Frontier Set, FIU and Miami Dade College (MDC) decided to focus on improving the transfer pathway for business majors.

Based on a collaborative review of data and the use of a self-assessment exercise included in the Transfer Playbook, the teams from FIU and MDC found that students were meeting and exceeding the minimum GPA required for admission, but they were not completing prerequisites prior to transfer. The teams decided to focus on that because completion of prerequisites is critical to progression in upper-level courses and minimizes the risk of students graduating with excess credit hours, which in Florida carries a surcharge. The cross-institutional team engaged in the short-term improvement cycle uncovered outdated

FIU / MDC Driver Discussion Summary



information in transfer guides, brochures and websites. They developed and rapidly executed a multipronged strategy to update information and ensure both advisers and students were able to access the information they needed.

Importantly, while the cross-institutional team was working on improving communication around updated admission and degree requirements to all constituents, they also identified a key opportunity to resolve a long-standing pain point for transfer students. Miami Dade allows students to complete a computer literacy requirement through a competency-based assessment, but FIU required an actual course for MDC transfer students. For MDC students, this added credits, time and money. Based on targeted advocacy work undertaken by the team involved in the FIU/MDC improvement project, FIU's College of Business agreed to substitute the MDC assessment for the prerequisite, allowing students to complete more prerequisites prior to transfer. This unanticipated consequence of an improvement cycle that was initially focused on improved communication represented a major win for students and a new pride point for FIU and MDC.

The team left their first 90-day cycle excited about what they accomplished and motivated to keep tackling the hard issues in future cycles. As Julie Alexander, vice provost for academic affairs at MDC, said,

> **We surprised ourselves at the amount of progress we were able to make in 90 days. Taken in "bite-sized" chunks, we were focused and able to remove known roadblocks that have been in place for years.**

When we asked Janie Valdés, the assistant vice president for enrollment management and services at FIU, to reflect on the value of using a short-term improvement process to accelerate progress, she said,

> **It felt like we were a rapid response team -- we were highly focused and efficient. The process forces you to be organized and accountable. Each of our team members also had strong networks at our respective institutions, which allowed us to move quickly through data collection, environmental scanning, planning and execution. I was surprised at the simplicity and utility of the process. We learned how much we could accomplish during a short period of time when we have quality data, clear goals and dedicated team members who can execute. We also left the project with more questions and plans for future projects.**

90-Day Cycle Action Planning Worksheet | Appendix

Guiding questions:

1. What is our charter for this 90-day cycle? (What are we going to accomplish?)
2. How will this accelerate progress on our S.M.A.R.T. goal?
3. How will we know?

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Driver Diagram Template Worksheet | Appendix

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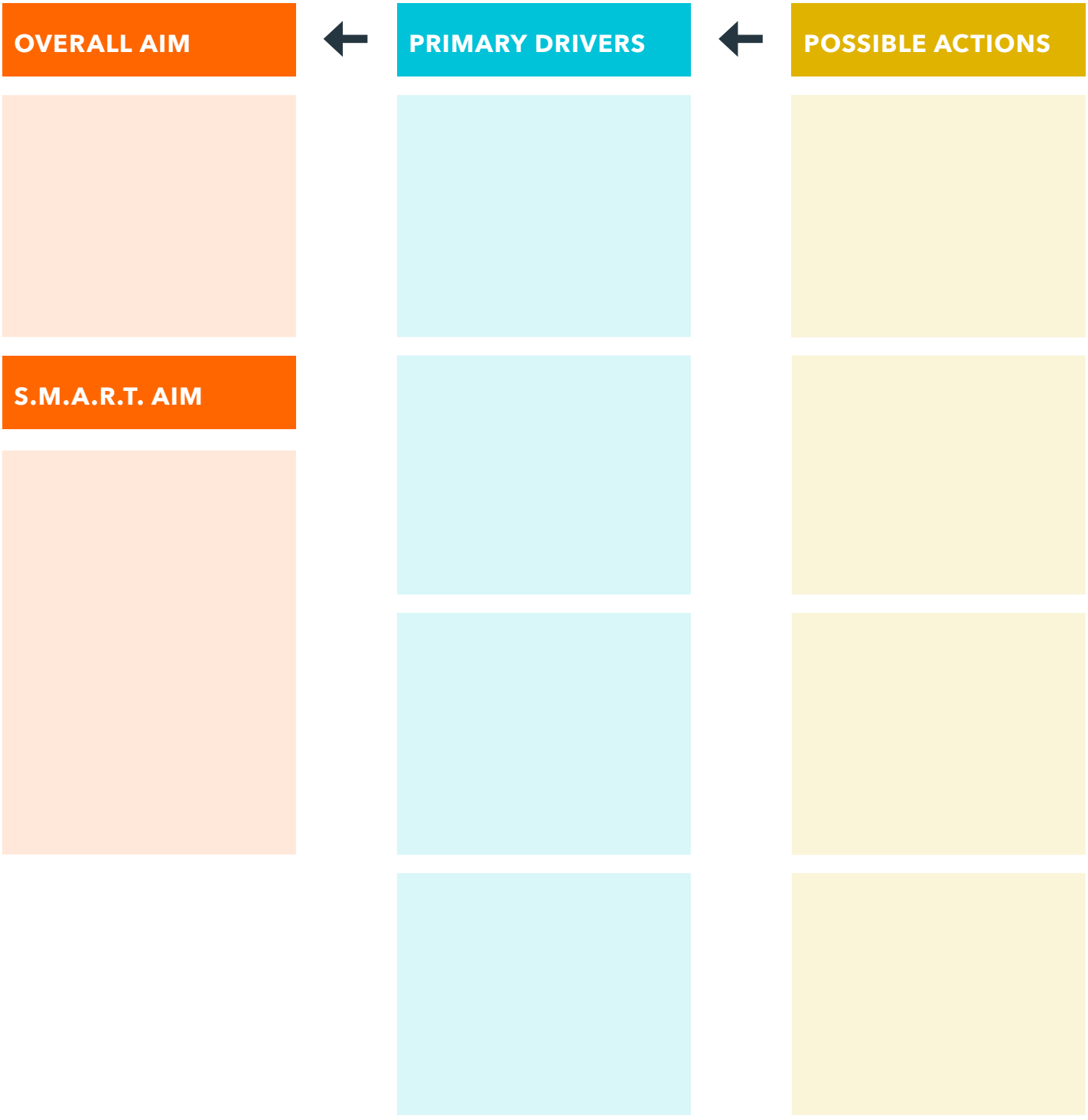
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