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Retention 101: It's more than just your yield! The YMAP

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Learning Objectives

- Provide introductory understanding of retention concepts.
- Identify data analysis and planning methods in retention.
- Provide tips for evaluating current university processes to develop rules for data collection, leading to new policies/procedures which support accurate data & analysis while identifying retention needs.
- Develop processes that support data collection to track progression and attrition in the GEM retention funnel
- Y-MAP.
- Integrate retention information into predictive enrollment planning for institutional targets.

Agenda

- Who we are, why we are here.
- Retention (What it is, what it's not)
  - Definitions
- Policies that drive Retention efforts.
- Build a model on campus.
- Sample Reports/Models build by presenters.
- Measure your data – interpret your results.
- Integrate data for enrollment planning
  - The Y-MAP.

The Diversifying GEM Professional

- Who we are and why we're here.

Retention: What it is, what it's not

Definitions and Context

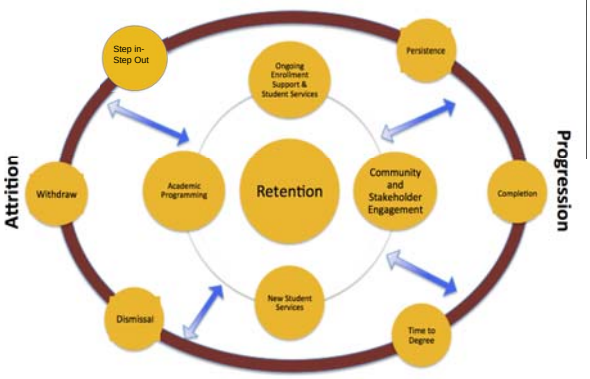
Retention: What it is, what it's not

Retention is the "ability of an institution to retain a student from admission through graduation" (Seidman, 2005, p. 14).

- Clearly marked pathways to student success.
- Shared responsibility for educational quality and student success.
- Retention efforts require the support and involvement of the total institution.

Retention is NOT reactionary, but is a fundamental component of a comprehensive strategic enrollment plan.

Retention Analysis



Definitions: Attrition and Causes

- **Attrition** is described as "A student who fails to reenroll at an institution in consecutive terms" (Seidman, 2005, p. 14). It is the result of an intricate interplay among a multitude of things that result in step outs, drop outs, and dismissals. Requires analysis and multiple strategies to reduce occurrences.
- **Causes:**
  - Finances
  - Academic difficulty
  - Goal change or attainment
  - Uncertainty of educational/career plan

Definitions: Areas of Attrition

- **Step-outs:** students who stop taking classes consecutively for one or more semester.
- **Step-ins:** students who resume the coursework after a step-out.
- **Withdrawals**
- **Dismissals**
- **Graduation**

Definitions: Areas of Progression

- ***Persistence*:** "the desire and action of a student to stay within the system of higher education from beginning through degree completion" (Seidman, 2005p. 14).
- ***Completion Rate*:** is the percentage of students seeking a degree who actually receive one.
- **Time to degree:** the time it takes an average student to complete their degree.

Policies that Drive Retention Efforts

One size does NOT fit all!

Policies that Affect Retention Efforts

- Continuous Enrollment
- Leave of Absence
- Re-instatement
- Late Registration
- Add/Drop
- Course Withdrawal
- Financial Liability
- Exceptional/Special Withdrawal
- Institutional Withdrawal
- SAP (Satisfactory Academic Progress)
- Incomplete and In progress courses
- Attendance
- Dismissals

Reporting on Campus

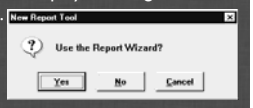
Is everyone on the same page?

Reporting on Campus

- Does your school have a definition for persistence on your campus?
- What are you analyzing? What are the metrics?
- What data is available? Is it accurate?
- Are there limitations? What are they?
- Do you have the type of software tools to track persistence? Program?
- Human Resource issues: Data Analysis /Programmer.

Building an Analysis Model

- Purpose
  - Look at persistence & attrition at the academic program level.
  - Determine retention rates by various student characteristics.
  - Determine when and why students leave.
  - Identify patterns.
  - Use results to strategize efforts to employ to change problems that may be identified.



Building an Analysis Model

- **Caution**: Don't focus too much on the quantitative measures of retention (e.g. graduation rate, persistence rate) and lose sight of the qualitative goal of retention initiatives (e.g. quality enhancement programmatically and experientially).
- **Challenges in Data Accuracy**: Having access to data and having accurate data.
  - **Important**: Student coding needs to be accurate from point of application/admission throughout progression until graduation.
- **How**: Collect, compile, and analyze pertinent retention-related data, information, and research to aid and support retention-related planning and strategizing.
  - Data
  - Focus Groups
  - Survey's

Building an Analysis Model

- **Analysis by Program:** Look at retention not only to determine persistence, but to identify opportunities to learn more about the academic programs.
  - Onboarding Practices
  - Melt after registration
  - Step out or drop out points
  - Course delivery/scheduling
  - Average credit hours
  - Course completion
  - Term-to-term persistence
  - Completion rates

Key Advantages in Building a Model

- Create informed metrics.
- Customize strategy based on outcomes.
- Strategy can be based on grades, classes, instructor, time of year, and course capacity.
- Can drive the need to enforce or change current policy, and identify the need for additional policy.
- Manage registration melt before and after add/drop can result in adjusting recruitment and admission goals.

Key Advantages in Building a Model

- Predict attrition during add/drop:
  - Create a waitlist
  - Increase caps to handle melt
- Allows you to create more accurate enrollment projections.
- Help drive enrollment and retention yields.
- Effects enrollment and revenue forecasting.

Key Advantages in Building a Model

- Looks at drop rate:
  - Allows you to see if there is an increase or decrease in the % of people dropping out of the program and make assumptions base on patterns.
  - Can identify issues with course scheduling—how courses are paired and the completion rate.
  - Identify variables such sequencing, delivery, instructor, time of year, online vs. on campus.
  - Allows you to look at faculty and identify those who have high student attrition, high failure rates, or tend to give have higher than average grades.

Key Advantages in Building a Model

- Look at trends and see if there are any variables in course sequence and delivery.
- If you use a vendor for your online program, analysis may reveal more volatility with persistence and it may be directly related to admission and onboarding strategies.
- Could lead to setting up different structures and policies for on campus vs. online.

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Y-MAP: What is that Anyway?

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Y-MAP

Your **M**ath is **A**lways **P**erfect?

Yes. – **M**y **A**dmits **P**lummeted

You! **M**ake **A** **P**lan!

Yield, **M**elt, **A**ttrition and **P**ersistence
Formulas for Strategic Enrollment Planning

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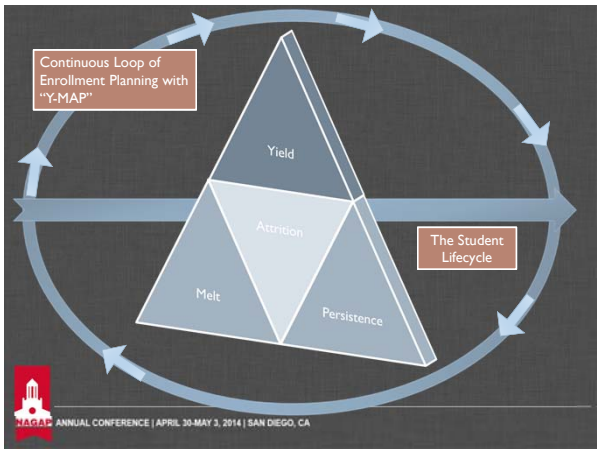
Continuous Loop of Enrollment Planning with "Y-MAP"
Yield
Attrition
Melt
Persistence
The Student Lifecycle
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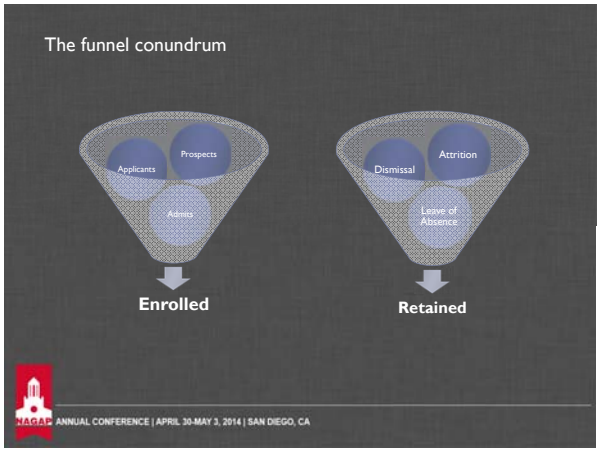
The funnel conundrum
Prospects
Applicants
Admits
Enrolled
Attrition
Dismissal
Leave of Absence
Retained
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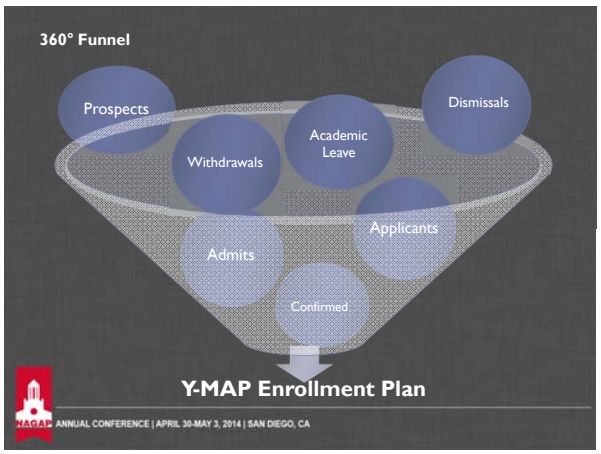
360° Funnel
Prospects
Withdrawals
Academic Leave
Dismissals
Applicants
Admits
Confirmed
Y-MAP Enrollment Plan
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If you think it, you can maybe do it?

- Thinking and rethinking what was possible.
- Each program is so very unique. How can we capture macro and micro level information?
- What would the "first" version of a report look like?
- What do I want to capture?
- How is it defined on my campus?

Saint Joseph's University Retention Model

Strategy

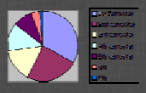
- Look at persistence & attrition at the academic program level.
- Determine retention rates by various factors:
  - Three year period
  - Number of credits earned to–date
  - Average credits per semester
  - Step-out analysis:
    - Determine when and why
    - Identify patterns
  - Conclusions/Outcomes
- Use results to strategize efforts to employ in order to change problems that may be identified.

SJU Data Analysis

Academic Program: Part-time 36 credit MS
124 students tracked over a 3 year period:
2010-2013

Semesters:

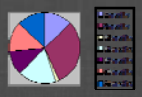
- 34% (n=41) are registered for their 1st semester
- 25% (n=30) are registered for their 2nd semester
- 16% (n=19) are registered for their 3rd semester
- 13% (n=16) are registered for their 4th semester
- 9% (n=11) are registered for their 5th semester
- 4% (n=5) are registered for their 6th semester
- 2% (n=2) are registered for their 7th semester



SJU Data Analysis

Total number of credits earned to-date

- 7% (n=9) have earned 3 credits
- 18% (n=22) have earned 6 credits
- 1% (n=1) have earned 9 credits
- 10% (n=12) have earned 12 credits
- 7% (n=8) have earned 9 credits
- 8% (n=10) have earned 15 credits
- 7% (n=9) have earned 18 credits
- 6% (n=7) have earned 21 credits
- 7% (n=9) have earned 24 credits



Students took 5.43 credits per semester on average.

SJU Data Analysis

Step Out Analysis

There were 105 classes taken by 25 individual students between fall 2010 and fall 2013.
Of these courses, 41 were completed in the last semester before stepping out.

Of the 41 class registrations:

- 46% (n=19) had a C, F, FA, NA or W grade.
  - 10% (n=4) had received an F in their last class before stepping out of the program
  - 5% (n=2) received an FA, NA or VF grade in their last class before stepping out of the program
  - 10% (n=4) withdrew from their last course before dropping out of the program
  - 5% (n=2) received a C in their last course before dropping out of the program

Of those who had a C, F, FA, NA or W grade (n=19) in their class prior to stepping out, they were enrolled in the following classes:

- 32% (n=6) in Healthcare Administration
- 11% (n=2) in Healthcare Organization
- 11% (n=2) in Healthcare Law
- 11% (n=2) in Healthcare Research 11% (n=2) in Managed Care

SJU Data Analysis

Step Out Analysis

Of the 25 students who stepped out, they had already earned the following amount of credit hours:

- 12% (n=3) had 3 credits
- 24% (n=6) had 6 credits
- 4% (n=1) had 9 credits
- 4% (n=1) had 12 credits
- 8% (n=2) had 18 credits
- 8% (n=2) had 21 credits

Of the 25 students who stepped out, they were enrolled in the following courses:

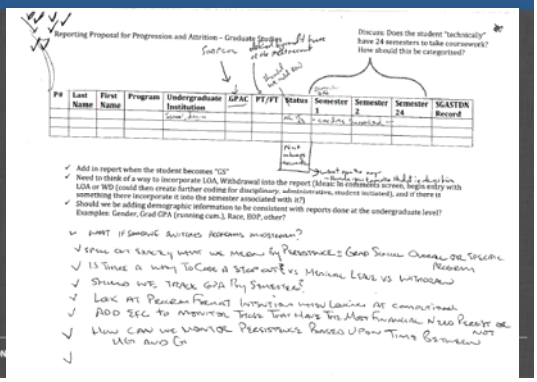
- 72% (n=10) in Healthcare Administration
- 8% (n=5) in Healthcare Organization
- 4% (n=4) in Health Research
- 4% (n=4) in Law
- 4% (n=3) in Ethics

SJU Data Analysis

Conclusions/Outcomes:

- Recommend students take courses, other than the introduction courses-Health Administration and Organization together due to a higher correlation with stopping or delaying the program.
- Pair classes with high step-out rates with ones that have low-step-out rates, for balance.
- Review course syllabi for consistency, clear course expectations, grading policies, to ensure all instructors are following the same format and rubric.
- If there are a high portion of students who have stopped after the first one or two semesters, reviewing the application process to determine if there are any predictors that may indicate possible problematic progression.
- Ensure that there are clear expectations at the time of admission.
- Institute strong orientation and onboarding practices, tools, and resources to ensure success in their first two semesters.
- Financial issues and personal factors, among others, often contribute to the stopping or delaying of a program; these cannot be assessed from this kind of an analysis.

My initial sketch……Don't laugh…OK go ahead….



Cleaned up a bit

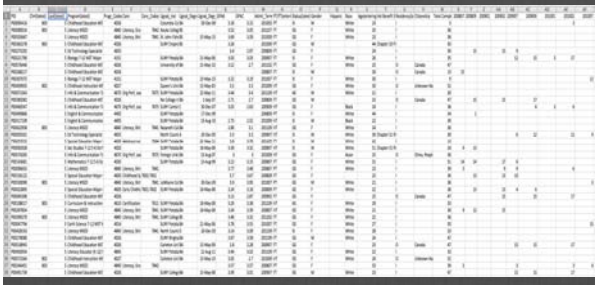
Program	UG Inst.	GPAC	FT/PT	Status	S1 --- S24	SGASTDN
AS – GS	LOA/WD	Demo	Gender	Trad/Non Trad	Grad GPA	Location

The list continues!

- Work to identify primary, secondary, tertiary attributes that we, as an office identify as important for current and future analysis.

How the report is "envisioned" to run: Prompt is to select a semester (or range of semesters) for a start point. This can be a cohort, or can encompass a range of students in a particular program.

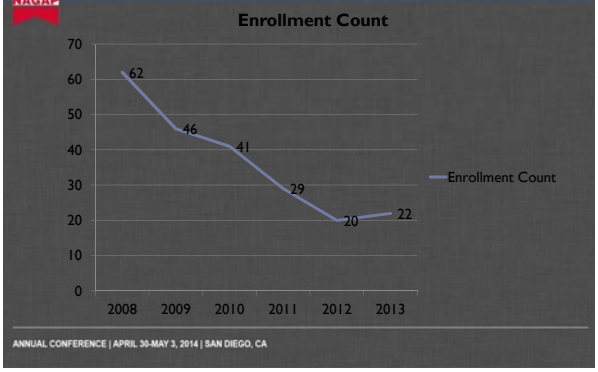
The Final Report



A Short Case Study

- MST Childhood Program
- 5 Year Study
- Need to define "what" and "who" you are studying
  - Fall start study (for time purposes).
- Using report, we should be able to track many retention items. For here, I'll show
  - Completion Rates
  - Average Semesters to Degree
  - Quick outcome assessment

Quick Context



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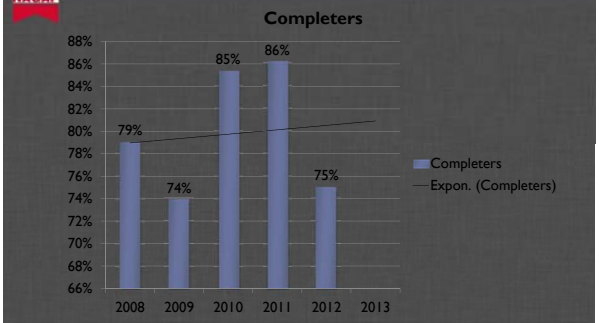
Completion Rates



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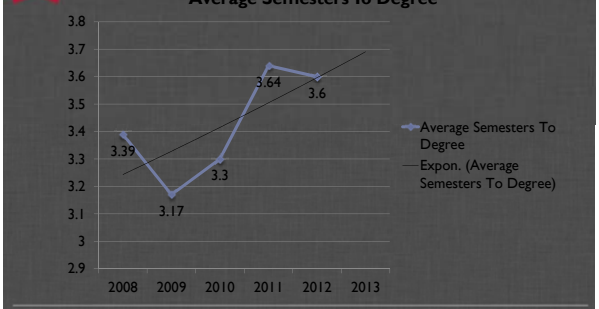
Average Time to Degree



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Brief Analysis

- Enrollment Trends are beginning to shift.
- Students are taking longer to complete. Why?
- Average completion saw a two year bubble, then trended downward closer to five year average. Need to investigate reasons.
- Many other types of analysis can be done. Brief examples would be….

A Quick Case Study

Using the Y-MAP

Scenario

Last year, your enrollment target for all graduate programs was 290 (for purposes of the exercise this includes FT and PT). You experienced 14% melt, and had a record yield of 78%. Additionally, your Dean has expressed a very specific goal of keeping institutional selectivity at the graduate level below 75%.

Over the past year, you learned that 4% of this incoming cohort did not return for the second semester. Overall FTE has decreased as well, as there are currently 16 students on an academic leave of absence and 2 students were dismissed for undisclosed reasons for the next year. "We need to bring in a class to offset the decline in our overall FTE numbers for next year," says the VP for Enrollment Management.

You have been asked to develop an analysis and projection of the admissions funnel for next year. The five year strategic enrollment report calls for a modest 3.5% enrollment growth each year, and you are in the 3rd year of this plan. What should your funnel look like to reach your goal?

What we know…

1. Yield was 78%
2. Melt was 14%
3. Selectivity ≤ 75%
4. Applicant Completion= 80%
5. Withdrawals 4%
6. 16 students on academic leave
7. 2 students dismissed
8. 50 students graduated
9. Expected 3.5% enrollment growth

Break down your analysis

Target = 290 + 3.5%
300 NEW + ATTRITION

The Traditional "Admissions" Funnel

Total Applications	Completed Applicants	Admits	Confirmed
667 =556*1.2 or (80% completion)	≥ **556** = 417/.75 or (75% Selectivity)	**417** = 342 * 1.22 or (78% Yield)	**342** (300 goal with 14% melt [300*1.14])

Melt: 14% (We need to admit 14% more than target)

Yield: 78% (We need to admit assuming we yield 78% of Admits)

Minimum Selectivity: 75%

Average Applicant Completion Rate: 80%

Retention Impacts

Withdrawals	Leave of Absence	Dismissals	Graduation
12 =290*.04 or	**16 Students**	**2**	**50**

Attrition: 12 students will not return, or 4% of last year's class.

LOA: students are on leave for the entire year next year.

Dismissal: 2 students were dismissed from the institution and will not be returning (could also be included in the attrition computation).

Graduation: A smaller graduating class of 50 received their degrees. This is 7% of the entire graduate student body.

Putting it all Together.

Total Applications	Completed Applicants	Admits	Confirmed
667 =556*1.2 or (80% completion)	≥ **556** = 417/.75 or (75% Selectivity)	**417** = 342 * 1.22 or (78% Yield)	**342** (300 goal with 14% melt [300*1.14])

Withdrawals	Academic Leave of Absence	Dismissals	Graduation
12 =290*.04 or	**16 Students**	**2**	**50**

"Integrate 80"

Putting it all Together. Final Enrollment Targets

Total Applications	Completed Applicants	Admits	Confirmed
845 =704*1.2 or (80% completion)	≥ **704** = 528/.75 or (75% Selectivity)	**528** = 433 * 1.22 or (78% Yield)	**433** (380 goal with 14% melt [380*1.14])

Your Next Steps: Where do you go from here?

- Start the Retention conversation on your campus.
- Establish institutional definitions of graduate retention.
- Audit your policies that drive progression at the graduate level.
- Practice the Y-MAP using your programs and enrollment statistics.

Questions?

Thank you!

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