



FirstGen Forward
LEADER
ACADEMY

2026

**2026 NASPA First-generation
Student Success Conference**

June 11 - June 13, 2026
Austin, TX

 **FirstGen
FORWARD**
The future is FirstGen

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In March 2023, we conducted the inaugural Network Leader Academy with the generous support of the Strada Education Foundation. With ongoing support from several funding partners, we can continue to create this transformational experience for Network Leader institutions.

FUNDING PARTNER ACKNOWLEDGEMENT

Thank you to our funding partners for their commitment to first-generation student success.



Schedule

TUESDAY, JUNE 9

3:00 - 5:00 PM	Check-in at Registration Desk <i>Griffin East Foyer</i>
5:00 - 6:30 PM	Welcome Social <i>JW Marriott Rooftop</i>

WEDNESDAY, JUNE 10

7:30 - 8:50 AM	Registration <i>Griffin East Foyer</i> Breakfast <i>Brazos</i>
9:00 - 10:00 AM	Opening Session <i>203-204 - JW Marriott</i>
10:10 - 11:00 AM	Network Success Panel <i>203-204 - JW Marriott</i>
11:10 - 12:00 PM	Leading Together: Strengthening Team Dynamics and Collaborative Partnerships for First-generation Success <i>402-403 - JW Marriott</i>
12:10 - 1:15 PM	Lunch & Networking <i>Brazos</i>
1:25 - 2:15 PM	Expert Guidance Group Meetings & Continuous Improvement Work Time <i>Attendee: Primary Contacts</i> <i>408-409 - JW Marriott</i>
	Postsecondary Data Partnership: File Submission Open Hours <i>Attendee: Data Submitters</i> <i>402-403 - JW Marriott</i>

WEDNESDAY, JUNE 10 (CONTINUED)

2:20 - 3:20 PM	Cohort Seven Insights Tool Report Presentation <i>408-409 - JW Marriott</i>
3:20 - 3:45 PM	Snack Break + Networking <i>Brazos</i>
3:45 - 4:30 PM	Institutional Work Time <i>408-409 - JW Marriott</i>

THURSDAY, JUNE 11

7:30 - 8:50 AM	Breakfast <i>Brazos</i>
9:00 - 9:40 AM	Network Knowledge: Transformation Grant Highlights <i>203-204 - JW Marriott</i>
9:45 - 10:35 AM	Network Knowledge: Higher Education Trends <i>203-204 - JW Marriott</i>
10:45 - 11:35 AM	Institution Work Time <i>203-204 - JW Marriott</i>
11:40 - Noon	Closing <i>203-204 - JW Marriott</i>

FirstGen Forward Staff



President

Stephanie J. Bannister, Ph.D.



Assistant Vice President

Wendy Beesley, M.P.A.

Network Strategies



Director

Zachery Holder, M.S.

Talent & Creative Strategy



Director

Catherine Johnson, M.Ed.

Learning & Data Strategy



Vice President

Martina A. Martin, Ed.D.

FirstGen Forward Network



Senior Director

Garrett Nagaishi, M.A.

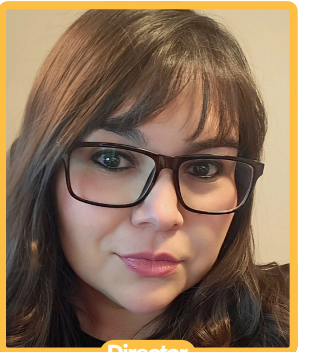
Organizational Operations



Assistant Director

Blake Nantz, M.S.

Data Analytics & Learning



Director

Rosemary Sandoval

Organizational Effectiveness & Executive Assistant to the President



Assistant Director

Jennifer Luken Sutton, Ph.D.

Expert Guidance and Recruitment Strategies



Executive Vice President

Deana Waintraub Stafford, M.Ed.

Innovation & Effectiveness



Associate Vice President

Qua'Aisa Williams, Ph.D.

Learning & Impact

Opening Session & Fireside Chat



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President, FirstGen Forward



Jeff Kahlden, M.S.

Director of Grant Management Services,
Dallas College
Board Chair, Council for Opportunity in Education



Kate Lehman, Ph.D.

Executive Director, National Resource Center for the
First-Year Experience and Students in Transition

Notes

Network Success Panel

Panelists



Melanie Jones, M.Ed.
Senior Director,
Student Success Programs
Kent State University



Ben Thoreson, M.S.Ed.
Director of Student
SuccessPromise/Honors
Coordinator
Richard Bland College



LaNae Budden, Ed.D.
Director, First-Gen Center
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Romando Nash, J.D.
Vice Provost for Student
Affairs
Washington State
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Moderator:

Wendy Beesley, M.P.A.
Assistant Vice President, Network Strategies
FirstGen Forward

Notes

Leading Together:

Strengthening Team Dynamics and Collaborative Partnerships for First-generation Success

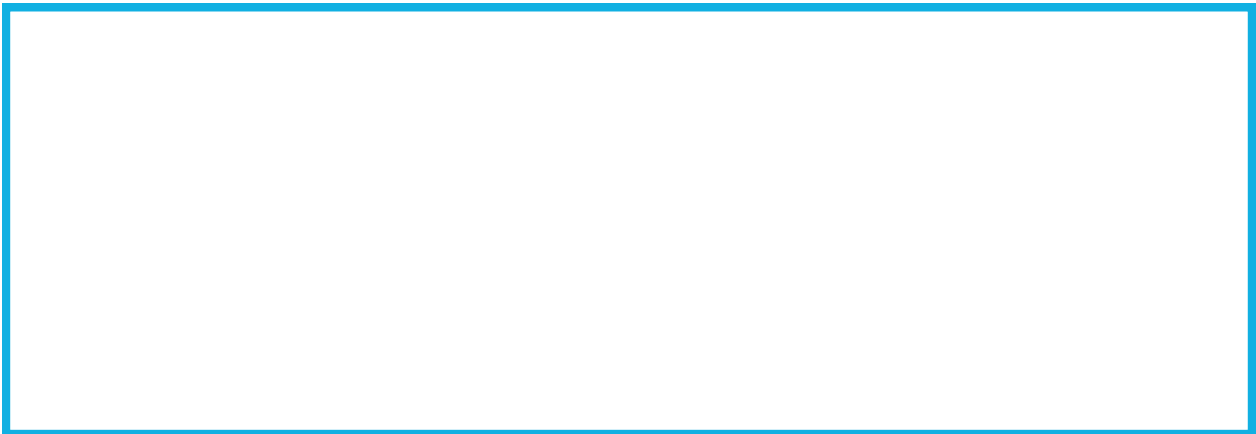
Partnership Mapping

Reflection Questions:

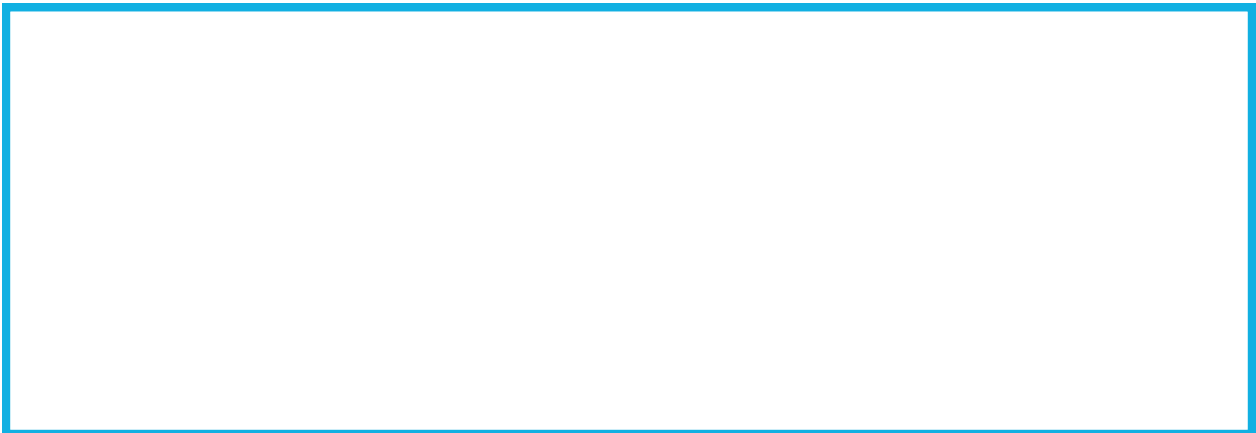
1. Who are your current key collaborators for first-gen work?



2. What makes these partnerships effective?



3. Who is missing from your collaboration network?



Understanding Your FGF Network Leadership Team Roles

Role	Primary Responsibilities	Current Strengths	Areas to Strengthen
Cabinet-level Leaders			
Primary Contacts			
Institutional Research			
Other Key Roles			

Quick Reflection: What's one immediate step to strengthen role clarity?

First-generation Success Team Roles and Responsibilities

This reference guide outlines common roles within effective first-generation student success teams.

Role	Primary Responsibilities	Key Contributions	Typical Communication Needs
Cabinet-level Leaders	<ul style="list-style-type: none"> Strategic direction Resource allocation Policy approval Institutional advocacy 	<ul style="list-style-type: none"> Executive support Removing barriers Cross-divisional authority 	<ul style="list-style-type: none"> High-level updates Strategic alignment Resource impact
Primary Contacts	<ul style="list-style-type: none"> Program coordination Day-to-day implementation Cross-campus communication Student engagement 	<ul style="list-style-type: none"> Ground-level insights Relationship building Direct student impact 	<ul style="list-style-type: none"> Regular operational updates Implementation challenges Success stories
Institutional Research	<ul style="list-style-type: none"> Data collection Outcomes assessment PDP submissions Trend analysis Survey administration 	<ul style="list-style-type: none"> Evidence-based insights Impact documentation Continuous improvement 	<ul style="list-style-type: none"> Data interpretation needs Research questions Assessment timelines
Faculty Champions	<ul style="list-style-type: none"> Classroom engagement Curriculum integration Academic support advocacy Research opportunities 	<ul style="list-style-type: none"> Academic expertise Classroom integration Faculty perspective 	<ul style="list-style-type: none"> Academic calendar awareness Faculty governance processes Discipline-specific approaches
Student Affairs Leaders	<ul style="list-style-type: none"> Support services coordination Co-curricular programming Community building Crisis intervention 	<ul style="list-style-type: none"> Holistic student development Support service expertise Student engagement 	<ul style="list-style-type: none"> Student trends and needs Programming opportunities Support service utilization
Students	<ul style="list-style-type: none"> Lived experience perspective Peer outreach Program feedback Event participation 	<ul style="list-style-type: none"> Authentic student voice Direct peer connections Current student perspective 	<ul style="list-style-type: none"> Accessible language Recognition of student schedules Multiple communication channels

Partnership Opportunity Planner

Select one high-potential partnership to develop

Partner/department to engage:

Mutual benefits:

What we offer:

What they offer:

Shared goals:

First action step:

By when:

Person responsible:

Effective Collaboration Models for First-generation Student Success

Model 1: The Hub & Spoke

- **Structure:** Centralized first-gen office (hub) with designated representatives in each academic and service unit (spokes)
- **Communication Flow:** Bi-directional between hub and spokes, with regular collective meetings
- **Often Best For:** Large institutions with distributed services and established first-gen programs
- **Example:** FirstGen University implemented this model by creating a First-generation Student Success Center with designated liaisons in advising, financial aid, academic departments, and student life. Regular monthly meetings ensure coordinated efforts and shared resources.

Model 2: The Working Group

- **Structure:** Cross-functional team with representatives from key departments meeting regularly
- **Communication Flow:** Shared leadership with rotating facilitation
- **Often Best For:** Mid-sized institutions with multiple first-gen initiatives needing coordination
- **Example:** Bannister College formed a First-gen Working Group with members from academic affairs, student success, multicultural affairs, and enrollment management that meets bi-weekly to coordinate programming and share resources.

Model 3: The Embedded Approach

- **Structure:** First-gen considerations integrated into all existing student success structures
- **Communication Flow:** First-gen champions in each unit with a coordinating committee
- **Often Best For:** Institutions seeking to mainstream first-gen support across all operations
- **Example:** PDP Community College trains "First-gen Allies" in every department who ensure first-gen perspectives are considered in all program and policy decisions, with quarterly sync-up meetings.

Model 4: The Faculty-Staff Partnership

- **Structure:** Equal partnership between academic and student affairs
- **Communication Flow:** Co-leadership model with joint planning and implementation
- **Often Best For:** Institutions focusing on academic-social integration for first-gen success
- **Example:** The College of First-gen Zen pairs faculty members with student affairs professionals to co-develop initiatives that bridge classroom learning with co-curricular experiences for first-gen students.

Note: Adapt elements from multiple models to fit specific context and needs.

Action Planning

Identify your key takeaways and next steps

One team practice to implement:

One partnership to develop:

The first three action steps when I return to campus:

1

2

3

Overcoming Barriers to Effective Collaboration

This resource identifies common barriers to cross-functional collaboration for first-generation student success and provides tested solutions from Network institutions.

Barrier	Symptoms	Possible Solutions
Competing Priorities	<ul style="list-style-type: none"> • Inconsistent meeting attendance • Delayed responses • Last-minute cancellations 	<ul style="list-style-type: none"> • Align with existing priorities and goals • Secure leadership endorsement • Connect to strategic plan • Document and share impact
Resource Constraints	<ul style="list-style-type: none"> • Resistance to new initiatives • Focus on department needs only • Burnout among collaborators 	<ul style="list-style-type: none"> • Start with low/no-cost partnerships • Share resources across units • Document efficiency gains • Build a case for additional resources
Territorial Concerns	<ul style="list-style-type: none"> • Reluctance to share information • Credit/recognition disputes • Duplicate competing efforts 	<ul style="list-style-type: none"> • Establish shared goals upfront • Create recognition for all contributors • Focus on student benefit • Document mutual advantages
Communication Breakdowns	<ul style="list-style-type: none"> • Mixed messages • Information silos • Misunderstandings about intentions 	<ul style="list-style-type: none"> • Create communication protocols • Check for understanding and alignment • Regular check-ins • Document decisions and actions
Leadership Changes	<ul style="list-style-type: none"> • Stalled initiatives • Shifting priorities • Relationship disruptions 	<ul style="list-style-type: none"> • Document agreements/processes • Distribute leadership roles • Create onboarding for new members • Connect to institutional mission
Cultural Differences	<ul style="list-style-type: none"> • Mismatched expectations • Different working styles • Terminology confusion 	<ul style="list-style-type: none"> • Build relationships before projects • Create shared glossary of terms • Acknowledge different perspectives • Focus on complementary strengths

Networking Connections

Use this space to capture contact information for connections you make throughout the Leader Academy. You may also use the NASPA app to add contacts under the "Connections" feature.

Name

Institution

Email

I want to connect because:

Name

Institution

Email

I want to connect because:

Name

Institution

Email

I want to connect because:

Name

Institution

Email

I want to connect because:

Name

Institution

Email

I want to connect because:

Name

Institution

Email

I want to connect because:

Expert Guidance Group Meetings & Continuous Improvement Worktime

The purpose of this time is to begin to draft a strategic framework for your first-generation efforts by identifying some key components of your project:

- Institution Focus Area
- S.M.A.R.T. Goal
- Metrics
- Barriers
- Improvement Projects

In the Appendix, you will find Key Terms and Concepts Defined, the Driver Diagram Generation Activity Guide - a comprehensive plan for identifying these key items as well as some examples to support your progress.

As your team works through the following template, be sure to consider the following:

- Current Institutional priorities
- Strategic goals already defined
- Existing programming and/or organizational structures
- Available data
- Committees or working groups in place that focus on student success



**THERE ARE DETAILED
EXAMPLES ON PAGE 43 IN
THE APPENDIX.**

STEP TWO: S.M.A.R.T GOAL(s)

Specific objective set within the broader Institution Focus Area.

Specific. Measurable. Achievable. Relevant. Timed.

Goal: What do you want to achieve?

Measurement(s) of completion: What will you need to measure to know if you've achieved your goal?

Timeline to completion: Identify a target date for achieving your goal.

Example S.M.A.R.T. Goal:

"For the entering Fall 2023 cohort: Increase first-generation four-year graduation rate by X% over the baseline of X% for the entering Fall 2019 cohort."

Alternate phrasing: "Reduce the completion gap between first-generation students and continuing-generation students by X% over the same period of time."

Goal:

Goal:

Goal:

Goal:

Goal:

STEP THREE: Metrics

What data is relevant to the SMART goal? Achieving the SMART goal will impact this metric.
Used to track progress toward an overarching goal.

Attainment Metrics:

Degree Completion: The percentage of students who complete their degree within a single institution.

Retention Rates (term/year): The percentage of students who return to an institution for subsequent term/year of academic study.

Examples of Early Momentum Metrics:

First-year Enrollment: The count of students beginning their enrollment at an institution.

First-year Retention: The percentage of students who return to an institution for their second year of academic study.

Year-to-Year Retention (Fall to Fall): The percentage of students who remain enrolled from one Fall term to the next Fall term.

Term-to-Term Retention (Fall to Spring; Spring to Fall): The percentage of students who remain enrolled from one term to the subsequent term.

Credit Completion Ratio: The ratio of the total number of credits earned by the total number of credits attempted in the first year of academic study.

Notes

S.M.A.R.T. Goal(s)

Specific objective set within the broader Institution Focus Area. Specific. Measurable. Achievable. Relevant. Timed.

Metrics

What data is relevant to the SMART goal?

Momentum Metric Specific Goal

Goal connected to one of four momentum metrics: first-year enrollment, retention, credit completion ratio, and degree completion rates.

STEP FOUR: Primary Barriers

The biggest issues challenges or obstacles that hinder progress towards your goals. It can help to think of barriers drivers as X in the following statements: "If we figured out X, we could achieve our goal" or "If we don't figure out X, it is unlikely we would achieve our goal."

Questions to consider:

1. Is this barrier *specific* enough that we all understand what to focus on?
2. Is this barrier *impactful* enough that it will move the work forward?
3. Is this barrier within our *locus of control*, meaning we can do something about it?
4. Is addressing these barriers *necessary and sufficient* for achieving our goal?
5. Which barrier do we think is our *greatest lever* for change?

Barrier 1	Brief description of the barrier.
------------------	--

Barrier 2	Brief description of the barrier.
------------------	--

Barrier 3	Brief description of the barrier.
------------------	--

Barrier 4	Brief description of the barrier.
------------------	--

Barrier 5	Brief description of the barrier.
------------------	--

STEP FIVE: Improvement Projects

The "work" that drives change. The project should directly address a primary barrier. Projects can be programmatic, process or procedure based or strategic in nature.

Barrier 1	Project(s) to address/minimize barrier.
------------------	--

Barrier 2	Project(s) to address/minimize barrier.
------------------	--

Barrier 3	Project(s) to address/minimize barrier.
------------------	--

Barrier 4	Project(s) to address/minimize barrier.
------------------	--

Barrier 5	Project(s) to address/minimize barrier.
------------------	--

Data Submission Requirements as a FirstGen Forward Network Leader

Successful data submission to the Postsecondary Data Partnership includes:

- 3 to 5 years of academic course and cohort data submitted to the Postsecondary Data Partnership (PDP) by August 1, 2026.
- Recent academic year data through Summer 2026.
- The first-generation variable (see below)
- Granted FirstGen Forward third-party access
- Annual data submissions due August 1 of each year

As a FirstGen Forward Network Leader, the first-generation variable is required, even though it is listed as optional in the PDP Data File Submission Guidelines. This variable is referenced within the Data File Submission Guide, as shown in the image below:

#	Variable	Variable Type	Format	Required	Description
27	First Gen	Enumerated		No	<p>Indicates whether either of the students parents has completed a certificate or higher credential at a post secondary institution. This field is used to populate the First generation dashboard filter, if this field is populated, you can filter students by first generation status in the dashboards. Valid codes:</p> <ul style="list-style-type: none"> • N = Neither parent attended college • P = At least one parent attended college but earned no credential or degree • C = At least one parent earned a certificate • A = At least one parent earned an associate's degree. • B = At least one parent earned a bachelor's degree or higher

Contact Information

FirstGen Forward Support: Network@firstgenforward.org

National Student Clearinghouse: PDPService@studentclearinghouse.org

Resources

PDP Commons:



PDP Data Submission Guide:



PDP Knowledge Base:



Institution Work Time

Outcome for the Institution Work Time Sessions: Guiding Reflections

Continue discussion on your framework - Focus Area (GOAL), barriers, and improvement projects.

Considering your Insights Tool results:

1. What data supports your framework?
2. What data is surprising?
3. How does the data inform the framework you've described?
4. Are there immediate steps this data would encourage you to take? (an initiative? further investigation? collaboration?)

Notes:

Key steps toward achieving your FOCUS AREA (GOAL):

1.
2.
3.
4.

Returning to Campus: To Do!

WHAT	WHO	DUE DATES	NOTES

Network Knowledge: Transformation Grant Highlights



Virginia Commonwealth University

PDP Analysis Training at the 4th Annual You First Summer Institute for Faculty and Staff

Presenter: Elizabeth Bambacus, Ph.D.

Director of First-Generation Student Experience
bambacuses@vcu.edu



Tarleton State University

IGNITE: Inspiring Growth, Networking, Innovation, and Transformative Experience

Presenter: Rachel Weldon-Caron

Assistant Vice President for TRIO Programs and First-Generation Initiatives
RWeldonCaron@tarleton.edu



North Carolina Central University

Destination HBCU: First-Gen Graduation

Presenter: Dekendrick Murray, Ed.D.

Executive Director for Student Access & Success
dmurra41@ncceu.edu

University of Washington Tacoma

First 3 Momentum Dashboard: A PDP-Aligned Student Success Outcomes Framework



Bonnie J. Becker, Ph.D.

Associate Vice Chancellor for Student Success and Associate Professor,



Dominic Jay "DJ" Leon Guerrero Crisostomo

Assistant Director of the Office of First Gen



Amanda Figueroa

Associate Vice Chancellor for Social Mobility

Network Knowledge: Transformation Grant Highlights

Presenter:	Institution:
Their role in the work	
Their idea/challenge	
My notes/advice	

Presenter:	Institution:
Their role in the work	
Their idea/challenge	
My notes/advice	

Presenter:	Institution:
Their role in the work	
Their idea/challenge	
My notes/advice	

Presenter:	Institution:
Their role in the work	
Their idea/challenge	
My notes/advice	

Closing Session

Reflection Questions

What is one key insight you are taking with you?

What is one action you will take in the next 30 days?

What support or partnership will you need to move this work forward?

Complete Participant Survey:





APPENDIX

Key Terms and Concepts Defined

Continuous Improvement Cycle Tools		
Driver Diagram	Purpose: Maps SMART goal, barriers, and projects to an overall institution focus area	Visual tool used to systematically organize and display the key drivers or factors that contribute to achieving a specific aim or goal. Helps teams understand the relationships between different components and activities that influence desired outcomes.
Action Plan	Purpose: Breaks projects into tasks, timelines, and ownership	Detailed plan outlining the activities or tasks needed to facilitate improvement projects and meet overarching goals.

Driver Diagram Components	
Institution Focus Area	Institution-level objective that supports the overarching aim of closing completion gaps between first-gen and continuing-gen students.
SMART Goal	High-level improvement goal/objective you want to achieve set within the broader Institution Focus Area that is Specific, Measurable, Actionable, Relevant, and Timed.
Metric	Data relevant to the SMART goal, where measurable progress toward the goal is expected to positively impact the metric.
Primary Barrier	Potential challenges or obstacles that hinder progress towards your SMART goal.
Improvement Project	Small-scale, action-oriented efforts designed to initiate progress toward a larger goal by directly addressing a primary barrier

Getting Started with Continuous Improvement Cycle Planning

Guiding Questions

What are our institution's top 3–5 strategic priorities? (e.g., equity, student success, retention, workforce readiness)

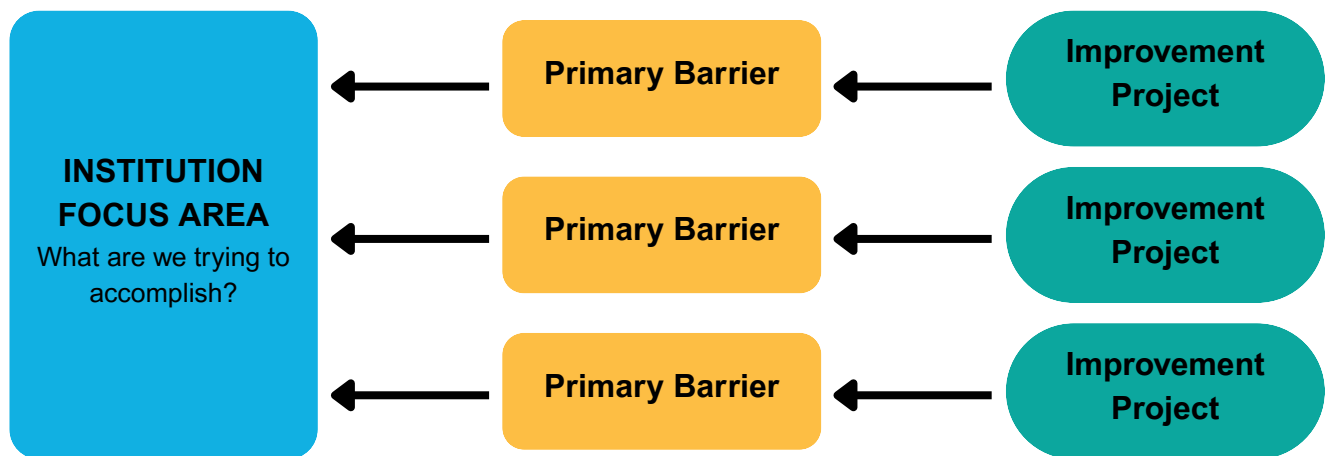
Where do we see explicit or implicit connections to first-generation student success?

What outcomes or indicators are emphasized in the strategic plan? (e.g., graduation rates, belonging, post-grad employment — these can help define metrics)

Which areas from the Insights Tool Report feel most urgent or most aligned with our institution's mission and goals?

Who are the decision-makers, data owners, or champions that need to be at the table for this conversation?

Driver Diagram Generation Activity Guide



The purpose of this activity is to generate a shared vision to drive a team's improvement efforts and ultimately achieve the overarching goal.

Note: Driver diagrams are not intended to be set in stone. Driver diagrams should evolve as you learn more about the problem/gap you want to address, the change ideas you are trying, and how best to achieve your aim. We encourage teams to revise driver diagrams to reflect your most current thinking/focus and to keep track of versions 1.0, 2.0, etc., so you can reflect on the evolution of your learning.

Definitions:

- **Institution Focus Area:** Institution-level objective that supports the overarching aim of closing completion gaps between first-gen and continuing-gen students. Informed by institutional strategic plans, data, insights, and Insights Tool report.
 - SMART Goal: A high-level improvement goal. Specific. Measurable. Achievable. Relevant. Timed. Specific objective set within the broader institution focus area.
 - Metric: The specific metric(s) you are seeking to address. What data is relevant to the SMART goal?
- **Primary Barrier:** The biggest issues blocking progress toward your goal.
- **Improvement Projects:** The "work" that drives change. The project should directly address a primary barrier.

ACTIVITY STEPS:

1. Clarifying/Refining the Institution Focus Area Statement (15 minutes)

As a group, craft/refine your goal: What do you want to accomplish, for whom, and by when?

Begin by having each person, individually or with a partner, craft a focus statement. Follow this with a share-around, where each person/partnership shares their goal with the group. Then the group can adopt/adapt from these to create a focus statement that everyone feels good about. Write your group's focus statement on the left side of your poster.

For Consideration:

Is your goal measurable? To help ensure your aim is measurable, it can be helpful to ask yourselves this question: "If X was the best it could be, what would it look like?" It can also help to get baseline data related to the issue/gap your team is working on.

Sample goals:

- By Spring 2027, reduce the retention gap between first-generation students and their continuing-generation student peers.
- By Spring 2028, reduce the graduation gap between first-generation students and their continuing-generation student peers.
- By Spring 2029, close the achievement gap between first-generation students and their continuing-generation student peers.

2. Identifying Primary Barriers (Primary Drivers) (20-30 minutes)

- **Individual (no more than 5 minutes):** Each person identifies the top 4 drivers (i.e., *high-leverage areas*) they think the team needs to focus on to impact the goal, and writes each driver on a separate index card.
 - **Facilitation Move:** It can help to think of drivers as X in the following statements: "If we figured out X, we could achieve our aim," or "If we don't figure out X, it is unlikely we would achieve our aim."
- **Share Around and cluster:** Each person shares their most preferred driver with the group. If others wrote down a similar driver, group these cards together on the table.
 - **Facilitation Move:** As your group shares and clusters, it can be helpful to organize the "stacks" with the most cards to the top of the table and those with the least to the bottom. This gives the group a visual indicator of which drivers might be most important.
- **As a group, select 3-5 drivers** that you think are essential for impacting your focus area. Write those drivers on your driver diagram poster. This is your "theory of action" (i.e., if you could move these drivers, you could achieve your overarching goal).
 - Questions for the team to consider:
 - Is this driver specific enough that we all understand what to focus on?
 - Is this driver impactful enough that it will move the work forward?
 - Is this driver within our locus of control, meaning we can do something about it?
 - Are these drivers necessary and sufficient for achieving our goal?
 - Which driver do we think is our greatest lever for change? (*Star* this one.)

3. Generating Improvement Projects (20-25 minutes; you will need another poster for this part.)

- **Individual Brainstorm (3 minutes):** What could we try that would impact the drivers we identified? What does the research say we should try? Where is this happening well already (bright spots) and what are they doing? Write each idea on its own Post-it.
- **Chart Your Improvement Project–Change Ideas (15-20 minutes):** On another large chart paper, draw an effort vs impact axis (see example below). Using your best collective guess, place each of the change ideas in the quadrant in which it fits best. Start by having each person share their favorite idea and cluster similar ideas as you continue to share.

It can be helpful to ask:

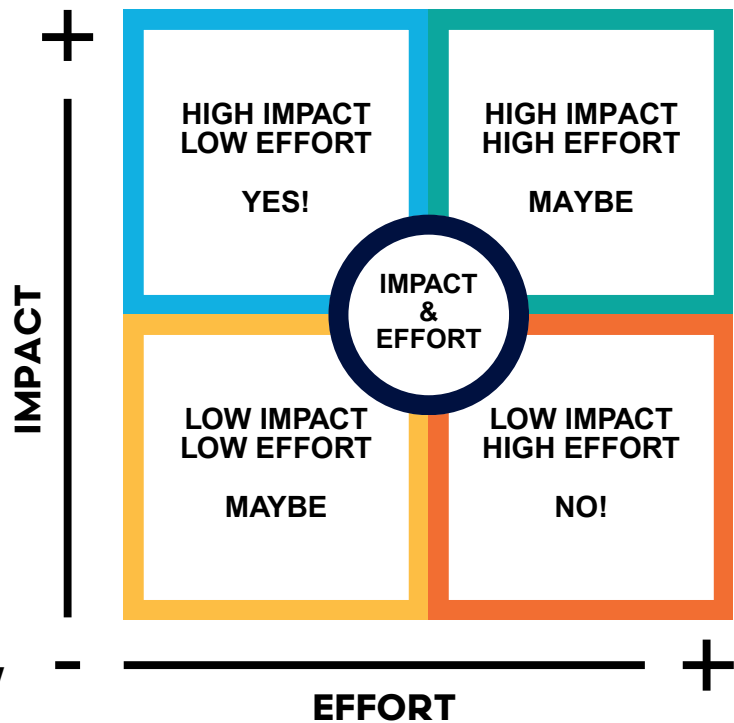
- How much effort (time, energy, resources) would it take for us to test this idea?
- If we are successful, what is the size of the likely impact?
- Will this idea impact issues of equity in our system?

- **Identify high-leverage change ideas (5 minutes):** As a group identify 4-6 change ideas that you think are most impactful, that you could get moving on quickly and that are within your team’s locus of control (i.e., usually those in the upper two quadrants).

Add these change ideas to your driver diagram, drawing arrows to show how they are aligned.

Questions for the team to consider:

- What do we notice about the alignment (or lack of) between our change ideas and drivers?
- If your change ideas don’t align with your existing drivers, this could suggest a new driver is needed.
- If you have a driver without any change ideas, this driver may not be helpful to your current “theory of action.”



4. Alignment Check (5-10 minutes)

5. Debriefing the Process (5 minutes)

References:

High Tech High Graduate School of Education. Center for Research on Equity and Innovation.
<https://hthgse.edu/resources/driver-diagram-protocol/>.

Continuous Improvement: Driver Diagram Development Example 1

Institution Focus Area:

An institution-level objective that supports the overarching aim of closing completion gaps between first-gen and continuing-gen students. Informed by institutional strategic plans, data, and Insights Tool report.

- **Example Focus Area/Institution Goal:** Graduation Rate
 - *“Increase graduation rates for first-generation students.”*

S.M.A.R.T. Goal

Specific objective set within the broader Institution Focus Area.

Example S.M.A.R.T. Goal: “For the entering Fall 2023 cohort: Increase first-generation four-year graduation rate by X% over the baseline of X% for the entering Fall 2019 cohort.”

- **Alternate phrasing:** *“Reduce the completion gap between first-generation students and continuing-generation students by X% over the same period of time.”*

Metrics:

What data is relevant to the SMART goal? Achieving the SMART goal will impact this metric. Used to track progress toward an overarching goal of increasing graduation rate.

Example Metrics: *“Track Fall-to-Fall retention rate of first-generation students in the Fall 2023 entering cohort for five (5) years, comparing future rates to those for the previous Fall intervals.”*

	Target	Actual
Entering Fall 2023 cohort	-----	68%
Fall-to-Fall retention rate (2024)	70%	
Fall-to-Fall retention rate (2025)	72%	
Fall-to-Fall retention rate (2026)	74%	
Fall-to-Fall retention rate (2027)	76%	
Fall-to-Fall retention rate (2028)	78%	

NOTE: You may also want to measure Fall-to-Spring retention rates as additional interim metrics in addition to the Fall-to-Fall rates.

Considerations:

- Consider using data you are already collecting. Are you already able to capture this? Can you use these as momentum metrics?
- Define the cohorts here: First-year students? First time in college (FTIC)? Transfers? How are you defining first-generation?
- Completion Gap: if using this, define what the current gap is and what your target is (e.g., Reduce the gap by X% using the same timeline).
- Graduation/completion: define graduation/completion (e.g., degree type, certification)

Continuous Improvement: Driver Diagram Development Example 2

Institution Focus Area:

An institution-level objective that supports the overarching aim of closing completion gaps between first-gen and continuing-gen students. Informed by institutional strategic plans, data, and Insights Tool report.

- **Example Focus Area/Institution Goal:** Completion Gap
 - *Decrease the completion gap between first-gen and continuing-gen students.*

A. Fall 2019 Cohort Overall 4-year graduation rate is 65%

Within the overall rate:

- First-gen student graduation rate is 60%
- Continuing-gen student graduation rate is 70%

B. Fall 2019 cohort	Actual
Fall-to-Spring retention rate (2019/20)	81%
Fall-to-Fall retention rate (2020)	78%
Fall-to-Spring retention rate (2020/21)	71%
Fall-to-Fall rate (2021)	63%

(*Continue F-to-F and F-to-S until grad year)

S.M.A.R.T. Goal

Specific objective set within the broader Institution Focus Area.

Example S.M.A.R.T. Goal:

- **Option #1:** For the entering Fall 2023 cohort: Increase the first-gen 4-year graduation rate by 5 % by 2027.
- **Option #2:** Reduce the completion gap between first-gen and continuing-gen students by 1% in 2024, 2025, and 2026 and by 2% in 2027 for a total of 5% by 2027.

Metrics:

What data is relevant to the SMART goal? Achieving the SMART goal will impact this metric. Used to track progress toward an overarching goal of increasing graduation rate.

- **Example Metric:** *“Track retention rate of first-generation students in the Fall 2023 entering cohort compared with those for the Fall 2019 cohort at the following intervals:”*

	Fall 2019 cohort	Fall 2023 cohort (target)
Fall-to-Spring retention rate (2019/20)	89%	90%
Fall-to-Fall retention rate (2020)	78%	80%
Fall-to-Spring retention rate (2020/21)	71%	74%
Fall-to-Fall rate (2021)	63%	67%

*Continue tracking term-to-term metrics until the 4-year graduation time frame target.

Considerations:

- Consider using data you are already collecting. Are you already able to capture this? Can you use these as momentum metrics?
- Define the cohorts here: First-year students? First time in college (FTIC)? Transfers? How are you defining first-generation?
- Define retention rate: registered? progressing toward a degree?
- Completion Gap: if using this, define what the current gap is and what your target is (e.g., Reduce the gap by XX% using the same timeline).
- Graduation/completion: define graduation/completion (e.g., degree type, certification)

ImproveEDU Outline & Instructions

Introduction to ImproveEDU

ImproveEDU elevates the way that FirstGen Forward and partner institutions operate by offering a streamlined virtual home to drive system change through enhanced campus coordination and visible prioritization of strategic goals.

In collaboration with Expert Guidance, the integration of the ImproveEDU platform allows institutions to collaboratively prioritize goals while also affording users the capability to make visible barriers or obstacles and devise strategies to support goal completion.

The ImproveEDU platform operates along two fundamental principles. First, it serves to coordinate institutional endeavors by providing a structured framework to articulate and document their continuous improvement initiatives. Secondly, it fosters a virtual environment for this work, allowing users to oversee task progression and coordinate work.

The user experience within the system mirrors that of a project management interface. ImproveEDU users gain visibility into all assigned tasks and task owners and can engage in collaborative discourse related to tasks. Additionally, automated reminders encourage timely completion.

Through ImproveEDU, institutions are empowered to drive system change in a sustainable and scalable manner that leads to elevated student success with clarity and effectiveness.

Building a Driver Diagram and Assigning Tasks

In this video, ImproveEDU users will be guided through the process of building a driver diagram and assigning tasks. By the end of this video, you will have a clear understanding of how to effectively use the driver diagram builder and assign tasks to drive your projects forward.

- Introduction
- Creating Presets for Driver Diagrams
- Viewing the User's Perspective
- Creating a New Driver Diagram
- Building the Driver Diagram
- Assigning Tasks to Action Plans

Instructions

This section will focus on building an institution driver diagram and assigning tasks.

To create or make edits to a driver diagram, follow these steps within the CIC section of the platform:

1. Begin by selecting "Driver Diagram" to access the driver diagram builder.
2. Click on "+ NEW DIAGRAM" to start a new driver diagram. You have the choice to either use an existing template or create a new one.
3. Create an "Institution Focus Area" and input the SMART Goal along with associated metrics. If you have a pre-existing driver diagram, you can easily copy and paste this information.
4. Next, input the institution's barriers. Each barrier should have a title and a brief description. To add a barrier, use the plus sign (+).
5. Once a barrier is created, you can add improvement projects related to that barrier. Add a title and description for each improvement project. You can include multiple projects using the plus sign.
6. To add another primary barrier, select "Add another Primary Barrier" and repeat the process to input all barriers and their associated projects.
7. Remember, you can move, edit, or remove any entries as needed.
8. Make sure to click "Save" to save your driver diagram for future reference.
9. To generate and view the completed diagram, click "Generate Diagram." Save the diagram once again and proceed to view it.

This creates a color-coordinated driver diagram with all the elements from the paper version visible. This includes the Institution Focus Area, SMART Goal, metrics, primary barriers, and improvement projects.

From this view, you have several options:

- Return to the builder to make further edits
- Print a copy of the driver diagram
- Begin building out action tasks
- View action plans
- View comments

To create action tasks:

1. Click on the horizontal ellipsis (three dots) in the top-right corner of the improvement project.
2. Select "Add Task."
3. In the task frame, provide the task name and assign the individual(s) responsible for the task.
4. Choose the cycle duration (30, 60, or 90 days) for this task and set the due date.
5. Add any necessary comments to support the task.
6. Click "Add" to complete the task creation.

To view action plans associated with a task:

1. Click on the horizontal ellipsis and choose "View Tasks."
2. Use filters to sort tasks by due date, creation date, or last update.

Additional features:

- You can create new tasks from this view.
- Navigate to the "My Tasks" link on the left side of the page to return to the task view.

By following these steps, you can efficiently create, edit, and manage driver diagrams, along with their associated improvement projects and action tasks.

Communicating within ImproveEDU

This section explains the different ways of communicating within the institution hub and previews the key points institutional users need to know. The video emphasizes the importance of using a centralized platform to avoid losing information and ensure effective collaboration. Additionally, this demonstration will walk users through how to comment on tasks and use @ mentions to trigger email notifications. This video will also show users how to view and comment on action plans, driver diagrams, and task discussions. Finally, it will discuss the importance of updating task statuses.

Instructions

To maintain a consistent workflow and facilitate communication among users within ImproveEDU, we have implemented various features such as tasks, action plans, driver diagrams, and more. These tools enable users to collaborate effectively and stay informed about project-related activities.

Accessing Tasks and Comments:

- To get started, go to the "My Tasks" section. Here, you can access your tasks and engage in discussions.
- Users can comment on tasks and view comments made by others. This feature allows for questions, specific pointers, additional context, and more.

Notifications:

- When a user is mentioned with "@username" or when someone comments on a task (even without including a mention), an email notification is triggered. This email will be sent to your contact's inbox, informing them that they've been mentioned or there's a question.

Viewing Task Discussions:

- To view comments or questions related to a driver diagram, click on the "Driver Diagram" link.
- Select the specific driver diagram you want to view and click on the horizontal ellipsis on the right.
- From the dropdown menu, select "View Comments."

Navigating to Project or Task Level:

- For a more detailed view, navigate to the "More Specific" section in the top right-hand corner of the page.
- Select "Project" to access project-related information.
- From there, choose "Task" to see task-specific details, including comments, user assignments, current health status, and due dates.

Updating Task Health:

- In the individual task view, you have several options:
 - Delete a task using the red "Delete Task" button.
 - Mark a task as complete using the green "Mark Task Complete" button.
 - Update the task's health status by clicking the blue "Update" button.
- You can indicate whether you're "On Track," "Behind Schedule," or if you "Need Help." Save your response.

Task Health Display:

- The refreshed page will display the updated health status in the "Current Health" section.
- Task health, along with the due date, will also be visible in the "My Tasks" area.

Visibility:

- These updates are visible not only to all users involved in the improvement project but also to FirstGen Forward staff and the Expert Guide.

Status Updates by FirstGen Forward Staff:

- FirstGen Forward staff or institutional representatives have the authority to update the status of any task at any time.
- When a task's health is updated, users will receive an automated email prompt every Friday, reminding them to check in.

Weekly Check-In:

- Clicking on the provided link in the email will lead you to a URL with links to all your active tasks.
- This process helps communicate the status of the work, prompting assignees to take necessary actions to ensure project success.

By following these steps and utilizing these features, ImproveEDU facilitates effective communication, collaboration, and task management within your institution's improvement projects.

Personalized Hub/Institution Settings

To customize and add additional users:

As a user, you can upload a picture, and edit your first and last name, role, or title.

To have additional users created, please contact your Expert Guide directly.

Extra Space Parking Lot

PUBLICATIONS & RESEARCH



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