



FirstGen Forward

NETWORK CHAMPION

CONVENING



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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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	Check-in at the Registration Desk <i>Griffin East Foyer - JW Marriott</i> Breakfast <i>Brazos - JW Marriott</i>
9:00 - 10:00 AM	Opening Session <i>203-204 - JW Marriott</i>
10:10 - 11:00 AM	NetworkSuccess Panel <i>203-204 - JW Marriott</i>
11:10 - 12:10 PM	Leveraging Bipartisan Support for First-Gen Student Success <i>203-204 - JW Marriott</i>
12:10 - 1:10 PM	Lunch & Networking <i>Brazos - JW Marriott</i>
1:20 - 2:20 PM	Moving Forward in the Age of AI: Leveraging Intelligent Tools to Advance First-gen Student Success <i>203-204 - JW Marriott</i>
2:30 - 3:15 PM	Data. Narratives, Storytelling...Oh my! Part 1 <i>203-204 - JW Marriott</i>
3:15 - 3:45 PM	Snack Break & Networking <i>Brazos - JW Marriott</i>
3:45 - 5:00 PM	Data. Narratives, Storytelling...Oh my! Part 2 <i>203-204 - JW Marriott</i>

Schedule

THURSDAY, JUNE 11

7:30 - 8:50 AM	Breakfast <i>Brazos - JW Marriott</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	Institutional Work Time <i>203-204 - JW Marriott</i>
11:40 - Noon	Closing and Evaluations <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.

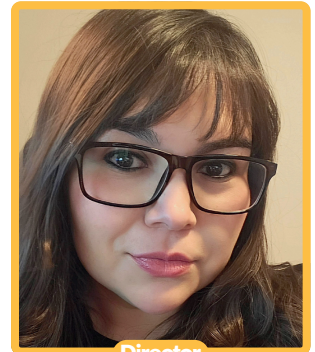
Organizational Operations



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



Thank you for the continued support for the Network Champion Convening.

FUNDING PARTNER ACKNOWLEDGEMENT

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



Opening Session & Fireside Chat



Stephanie J. Bannister, Ph.D.

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
University of South Carolina



Romando Nash, J.D.
Vice Provost for Student Affairs
Washington State University



Moderator:

Wendy Beesley, M.P.A.

Assistant Vice President, Network Strategies
FirstGen Forward

Notes

AI Maturity at Your Institution

Locate yourself, your people, and your institution. The four stages: Awareness → Literacy → Fluency → Leverage. Apply at the personal, group, and institutional level. The bottom two rows are cross-cutting: ethics-and-identity decisions gate how far you go; resource-and-cost commitments enable any progression at all.

AI MATURITY	AWARENESS	LITERACY	FLUENCY	LEVERAGE
ME	Self-assess my AI use; know what tools exist; observe colleagues; name my gaps	Complete training; experiment safely; understand prompting & limits; build personal use cases	AI as routine workflow; advanced prompting; judge when AI fits; teach others	Build personal agents/workflows; multiply my impact; advise others; model what's possible
OUR PEOPLE students, faculty, staff, admin	Baseline survey by role; map who uses what; identify champions & vocal skeptics	Define literacy competencies by role; training plan; onboarding integration; equity check; comms plan	Identify roles needing fluency; cohorts & communities of practice; stipends & release time; recognition	Develop internal experts & coaches; succession planning; AI-leveraged role models
OUR INSTITUTION	Inventory tools (free / enterprise / P-card / self-pay); risk & data exposure scan; policy review; peer scan	Write necessary policy; course-level policy system; standing & ad hoc committees; advisor / leadership roles	AI integrated into operations; vendor management; data governance; AI ethics review process	Strategic plan integration; KPIs & measurement; pilot → measure → scale; build-vs-buy; sunseting process
ETHICS & IDENTITY cross-cutting	Surface concerns; ask "what does AI mean for who we are?"	Mission alignment; "what remains essentially human?"; bias awareness	Bias auditing as ongoing practice; faculty role evolution; student development concerns; authenticity	Decide explicitly how far to go; community & employer trust; workforce implications; sustainability footprint
RESOURCEs & COSTS cross-cutting	Identify spend (visible & shadow); know cost categories	Budget allocation by stage; central vs. departmental sharing; procurement strategy	Time/labor investment (release, stipends); total cost of ownership; recurring sustainability	ROI measurement; strategic reallocation; vendor consolidation; long-term commitments

Workbook: Tasks to Take Home

Tagged by track: **[ME]** personal practice · **[PEOPLE]** the people of your institution · **[INSTITUTION]** the organization itself · **[ETHICS]** ethics & identity decisions · **[RESOURCES]** resources & costs

AWARENESS	LITERACY	FLUENCY	LEVERAGE
<ul style="list-style-type: none"> <input type="checkbox"/> [ME] Self-assess my own current AI use across work and personal contexts <input type="checkbox"/> [ME] Name three gaps in my own AI knowledge or skill <input type="checkbox"/> [PEOPLE] Run a baseline survey for faculty, staff, and students separately <input type="checkbox"/> [PEOPLE] Identify your campus champions and your vocal skeptics <input type="checkbox"/> [INSTITUTION] Inventory tools across free / enterprise / P-card / self-pay <input type="checkbox"/> [INSTITUTION] Scan where institutional and student data is flowing into AI tools <input type="checkbox"/> [INSTITUTION] Review existing policies (academic integrity, data, IT, HR) for AI fit <input type="checkbox"/> [INSTITUTION] Scan peer and aspirational institutions <input type="checkbox"/> [ETHICS] Surface the ethical concerns people are already whispering about <input type="checkbox"/> [RESOURCES] Identify current spend — visible budget lines and shadow/personal spend 	<ul style="list-style-type: none"> <input type="checkbox"/> [ME] Complete a foundational AI training appropriate to my role <input type="checkbox"/> [ME] Build at least three personal AI use cases I rely on <input type="checkbox"/> [PEOPLE] Define what literacy means at your institution (competency rubric) <input type="checkbox"/> [PEOPLE] Build and execute a training plan covering students through admin <input type="checkbox"/> [PEOPLE] Bake AI literacy into student orientation and new-employee onboarding <input type="checkbox"/> [PEOPLE] Run an equity check — who's at risk of being left behind? <input type="checkbox"/> [INSTITUTION] Write necessary policy where existing policies don't reach <input type="checkbox"/> [INSTITUTION] Develop a system for course-level AI policy development <input type="checkbox"/> [INSTITUTION] Establish standing and ad hoc committees, leadership, advisors <input type="checkbox"/> [ETHICS] Hold mission-alignment conversations across stakeholder groups <input type="checkbox"/> [RESOURCES] Allocate budget by maturity stage <input type="checkbox"/> [RESOURCES] Decide central vs. departmental cost-sharing model 	<ul style="list-style-type: none"> <input type="checkbox"/> [ME] Use AI as a routine part of my workflow <input type="checkbox"/> [ME] Develop advanced prompting and judgment about when AI fits <input type="checkbox"/> [ME] Mentor or teach at least one colleague <input type="checkbox"/> [PEOPLE] Define fluency competencies role by role <input type="checkbox"/> [PEOPLE] Build communities of practice and cohorts <input type="checkbox"/> [PEOPLE] Provide stipends, release time, and recognition <input type="checkbox"/> [INSTITUTION] Establish a regular and repeated training schedule <input type="checkbox"/> [INSTITUTION] Build vendor management and data governance for AI <input type="checkbox"/> [INSTITUTION] Stand up an AI ethics review process for deployments <input type="checkbox"/> [ETHICS] Make bias auditing an ongoing practice, not a one-time review <input type="checkbox"/> [ETHICS] Address faculty role evolution and academic freedom explicitly <input type="checkbox"/> [RESOURCES] Account for time/labor (release, stipends) — often bigger than tools <input type="checkbox"/> [RESOURCES] Plan for recurring-cost sustainability 	<ul style="list-style-type: none"> <input type="checkbox"/> [ME] Build personal agents or workflows that multiply my impact <input type="checkbox"/> [ME] Advise others on advanced AI use; model what's possible <input type="checkbox"/> [PEOPLE] Develop internal experts and coaches <input type="checkbox"/> [PEOPLE] Build succession planning for AI-leveraged roles <input type="checkbox"/> [INSTITUTION] Integrate AI into the strategic plan with KPIs <input type="checkbox"/> [INSTITUTION] Run pilot → measure → scale processes for high-value cases <input type="checkbox"/> [INSTITUTION] Use a build-vs.-buy framework <input type="checkbox"/> [INSTITUTION] Establish a sunsetting process for tools that don't deliver <input type="checkbox"/> [ETHICS] Make explicit decisions about how far to go (and what you won't do) <input type="checkbox"/> [ETHICS] Address workforce implications for staff roles <input type="checkbox"/> [ETHICS] Address sustainability and environmental footprint <input type="checkbox"/> [RESOURCES] Measure ROI on AI investments <input type="checkbox"/> [RESOURCES] Reallocate budget strategically based on what's working

Phone a Friend: AI in Higher Ed

For each item below, find a colleague whose campus does this well and capture their info: name, email, and phone if they'll share it. You don't need to fill in every line; focus on the contacts most useful to you.

#	What their campus does well	Name	Email	Phone
TEACHING & LEARNING				
1	Campus does AI course design & build well			
2	Campus has a strong student AI literacy curriculum			
3	Campus has solid syllabus/course-level AI policy templates			
4	Campus has effective LMS-AI integration. circle: Blackboard / Canvas / D2L / Moodle / Other:			
STUDENT SUPPORT				
5	Campus does AI in advising / student services well			
6	Campus has effective AI work supporting first-gen students			
7	Campus has strong AI accessibility practice (e.g.: captions, alt text, UDL)			
POLICY, ETHICS & COMPLIANCE				
8	Campus has strong institution-level AI policy			
9	Campus has a good academic-integrity approach to AI			
10	Campus has a good FERPA / data-privacy review process for AI tools			

#	What their campus does well	Name	Email	Phone
TRAINING & PROFESSIONAL DEVELOPMENT				
11	Campus runs great AI training. Circle audience: Staff / Faculty / Other instructors / Administrators / Community / Students			
OPERATIONS, PROCUREMENT & GOVERNANCE				
12	Campus has effective cross-functional AI governance			
13	Campus uses AI well in operations (admissions, IR, marketing, business processes)			
14	Campus has successful chatbot or custom-agent deployments			
15	Campus has a good AI procurement approach. Circle: Free / Enterprise / P-card / Departmental / Self-purchase			
RESEARCH				
16	Campus is conducting AI-impact research – can advise or partner			
Other				
17				
18				
19				
20				

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@ncu.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:

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	

Notes:

Network Connections

Use this space to capture contact information for connections you make throughout the Champion Convening.

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:

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

Speaker/Presenter Bios



Elizabeth Bambacus

*Director of First-Generation Student Experience,
Virginia Commonwealth University*

Dr. Elizabeth Bambacus is the director of the You First at VCU First-Generation Student Success and Research Center at Virginia Commonwealth University. She has worked in higher education since 2010, focusing on demystifying the college experience for first-generation students and removing barriers to their personal and professional

success. Dr. Bambacus earned her doctorate in counselor education and supervision from VCU, where her research explored the effects of mindfulness on first-year students' stress, well-being, and academic performance. She lives in Richmond, Virginia, and very much enjoys gardening in her free time.



Stephanie J. Bannister, Ed.D.

President, FirstGen Forward

Stephanie J. Bannister, Ph.D., is the president of FirstGen Forward, where she leads national efforts to advance student success and institutional transformation for first-generation students. With more than 20 years of experience in higher education, Stephanie has held leadership roles across student affairs, most recently serving as assistant vice provost for student success at Kansas State University. She

began her career in housing and residence life and has also served at the University of Kansas and as a national consultant supporting institutions and nonprofit organizations with strategic planning, accreditation, and program review.

Stephanie holds degrees from Fort Hays State University, the University of Kansas, and Kansas State University, where she also serves as a graduate teaching faculty member. A passionate advocate for first-generation students, she is deeply committed to building inclusive, student-centered systems that drive equitable outcomes. She lives in Kansas with her family.



Wendy Beesley, M.P.A.

Assistant Vice President, Network Strategies, FirstGen Forward

Wendy Beesley serves as the assistant vice president, Network Strategies with FirstGen Forward. Prior to joining FGF, Wendy was the assistant dean for student success at SUNY Ulster County Community College. She was also a member of the coaching leadership team and served as lead coach for the State University of New

York's Guided Pathways project, where she worked with SUNY colleges engaging in the work of institutional transformation. In addition, Wendy worked with the New York Student Success Center (NYSSSC) to develop and deliver training opportunities through the NYSSSC Coaching Academy.

Wendy holds an M.P.A and a B.A in political science from Marist College. She is currently completing a Ph.D. at the University at Albany—The State University of New York in educational policy and leadership with a focus on the progression of institutional change theory.



Bonnie J. Becker, Ph.D.

Associate Vice Chancellor for Student Success and Associate Professor, University of Washington Tacoma

Bonnie J. Becker, Ph.D., is Associate Vice Chancellor for Student Success and an Associate Professor at the University of Washington Tacoma. In her role, she partners across academic and student affairs units to advance student success initiatives related to advising, retention, teaching and learning, and institutional effectiveness, with particular attention to first-generation students. Her work bringing together these efforts is grounded in a commitment to data equity, emphasizing shared, equity-focused metrics that help institutions more transparently and responsibly understand student experience and outcomes.



Sarah F. Barrett, Ph.D.

Vice President for Impact Strategy and Grant Programs, Greater Manhattan Community Foundation (GMCF)

Dr. Sarah F. Barrett is Vice President for Impact Strategy and Grant Programs at the Greater Manhattan Community Foundation (GMCF), where she connects data, stories, and lived experiences to communicate the impact of the Foundation's grantmaking. She oversees the distribution of more than \$33 million in grants and works closely with nonprofits and community members to foster meaningful, sustainable change across the region.

Prior to GMCF, Dr. Barrett served as a Senior Research, Learning, and Evaluation Officer at the Ewing Marion Kauffman Foundation, translating research into actionable practice. She has also worked on federal policy and advocacy at Clery Center and served as a language and cultural ambassador in Zaragoza, Spain. At Kansas State University, she served as Assistant Dean and Director of Student Life and founded Cats' Cupboard, a client-centered food pantry addressing student food insecurity.

Dr. Barrett holds a B.S. in social science, an M.S. in marriage and family therapy, and a Ph.D. in applied family science — all from Kansas State University. She is a licensed marriage and family therapist and also holds certificates in leadership dynamics and human services administration. Dr. Barrett has been published in peer-reviewed journals and actively serves on multiple community boards.



Dominic Jay "DJ" Leon Guerrero Crisostomo

Assistant Director of the Office of First Gen, University of Washington Tacoma

Dominic Jay "DJ" Leon Guerrero Crisostomo (B.A., Pacific Lutheran University, 2004; M.P.A., The Evergreen State College, 2013) is Assistant Director of the Office of First Gen at the University of Washington Tacoma. He supports first-generation students and builds capacity among faculty and staff who teach and mentor them. As a first-generation graduate, DJ centers student voice using a design-thinking approach. He collaborates with faculty and community organizations to strengthen UWT's first-generation community. Previously, he worked with TRIO programs and brings 20+ years in nonprofit advocacy, fostering creative expression through arts such as design, music, and culture.



Amanda Figueroa

*Associate Vice Chancellor for Social Mobility,
University of Washington Tacoma*

Amanda Figueroa (B.S. 2004, M.S. 2010, University of Washington) is the founding Associate Vice Chancellor for Social Mobility at the University of Washington Tacoma. A first-generation college graduate, her work focuses on redesigning institutional structures to expand belonging and social mobility for

economically marginalized students. With 16 years of experience advancing equity-centered institutional change, she co-convenes the campus Student Success Council, leads FirstGen Forward Champion Campus efforts, and is a co-author of a forthcoming chapter on supporting first-generation students in the fourth edition of *Student Engagement in Higher Education: Theoretical Perspectives and Practical Approaches for Diverse Populations* (in press).



Jeff Kahlden, M.S.

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

Jeff Kahlden currently serves as the Director of Grant Management Services at Dallas College in Dallas, TX. In this role, he supports six TRIO grants—including Student Support Services, Talent Search, and Upward Bound—as well as Title V HSI grants across the college’s seven campuses. Through these initiatives, Jeff is part of a dedicated team that serves over 2,000 students throughout Dallas and its surrounding communities.

Prior to joining Dallas College, Jeff led TRIO programs at Weatherford College for 17 years, University of Arkansas–Fort Smith for 2 years, and Tarleton State University for over 3 years. His professional journey has been marked by increasing leadership responsibilities both within his institutions and across TRIO professional associations. He has held key roles on the state (Texas TRIO), regional (SWASAP), and national (COE) levels and is currently serving as the COE Board Chair for 2025-2026.

A native of Weimar, TX, Jeff is a first-generation college graduate of Tarleton State University, where he earned both his bachelor’s degree in Agricultural Services and Development and his master’s degree in Agricultural Education. Outside of his professional work, he remains active as a volunteer in a variety of organizations and with his alma mater. He also enjoys a variety of sports, hunting, playing “not so good” golf, and live music. He resides in Weatherford, TX with his family.



Kate Lehman, Ph.D.

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

Kate Lehman, PhD, serves as executive director of the National Resource Center for the First-Year Experience and Students in Transition where she provides leadership for all Center operations, strategic initiatives, conferences and events, publications, and scholarly and research activities. Kate also serves as an affiliated faculty member in the University of South Carolina’s Department of Leadership,

Learning Design, and Inquiry. Dr. Lehman’s research interests center on the major selection process for first- and second-year college students, experiences that promote student retention and success in their major field (particularly STEM and computing fields), and the college-to-career transition

Prior to joining the NRC, Kate served as co-founder and associate director of Momentum: Accelerating Equity in Computing and Technology and as Assistant Academic Researcher and Assistant Adjunct Professor in UCLA’s School of Education & Information Studies. Kate has also held positions in student affairs at The Ohio State University and the University of North Carolina Charlotte. Kate is a proud alum of Miami University, The Ohio State University, and UCLA. Outside of work, Kate is a mom of three, an exercise enthusiast (find her on Peloton!), and a Francophone.



Martina A. Martin, Ed.D.

Vice President, FirstGen Forward Network, FirstGen Forward

Martina Martin serves as assistant vice president of Network Success with FirstGen Forward. Prior to joining FGF, Martina served as associate director for the University of Kentucky's student community resources and services and as the program director for first-generation student services and off-campus student services. For over a decade, Martina assisted in developing university-wide first-generation initiatives focused on recruitment, retention, and career and professional development.

Martina is a proud first-generation college graduate of Eastern Kentucky University, where she earned a B.S. in physical education, an M.S. in physical education-sports administration, an M.A. in human services-student personnel services in higher education, and an Ed.D. in educational leadership and policy studies. Martina resides in Georgetown, Kentucky with her husband, Ricky Stone, Jr.



Dekendrick Murray

Executive Director for Student Access & Success, North Carolina Central University

Dekendrick Murray serves as the executive director for Student Access and Success at North Carolina Central University. In his role, Dekendrick provides oversight, visionary, and strategic leadership for initiatives for first-generation students, low-income students, and students with a documented disability.

Dekendrick oversees the following departments/programmatic areas: First-Generation Student Success, TRIO Student Access Program, LCI-Student Accessibility Center, Pre-College Access Programs, TRIO STEM Success Program, and the TRIO Teacher Preparation Program. Dekendrick is a strong advocate for student success, a 4x TRIO program alumnus (Educational Talent Search, Upward Bound, Upward Bound Regional Institute, and Ronald E. McNair Scholars), and a co-founder of a national biological science conference (iDigTRIO) to support the exposure and connection of underrepresented students to STEM-related careers and graduate-level programs. He also founded the National TRIO Student Access and Success Conference at NCCU, which focuses on student development and engagement for First-Gen, TRIO, and Accessibility Scholars & Staff of all ages. Dekendrick is also a champion for removing financial barriers to student success initiatives and has secured over \$9 million in grants and gifts in his career to increase student outcomes.

Dekendrick holds a Bachelor of Science in Family, Youth and Community Sciences from the University of Florida, a Master of Science in Instructional Leadership and Organizational Development from Jacksonville University, and is currently pursuing a Doctorate of Education (Ed.D.) in Community Care and Counseling at Liberty University. Above all, Dekendrick values his faith in God, family and preparing the next generation to be productive and influential members of society. He is married to his college sweetheart, and they have one child.

Carolyn Speer, Ph.D., CPTM, CPACC

Director of the Office of Instructional Resources Wichita State University

Dr. Carolyn Speer is Director of the Office of Instructional Resources at Wichita State University, where she leads faculty training, instructional design, and educational technology, and serves as a campus consultant on AI and teaching, including student-facing uses, grading, course development, and workforce training. She also teaches in the College of Education in the educational psychology program, where her courses span statistics, learning theory, and higher education teaching, which keeps her grounded in what AI actually looks like from inside a classroom.

Her recent work centers on what generative AI means for first-generation student success. She argues that AI meaningfully compresses the traditional access gaps first-generation students have historically had to close through trial, error, and proximity to people already inside the system. She is currently working with faculty across campus to bring down costs and expand applied learning in their courses through the judicious use of AI tools.

She also directs WSU's Academic Resources Conference and serves on multiple dissertation committees.



Rachel Weldon-Caron

Assistant Vice President for TRIO Programs and First-Generation Initiatives, Tarleton State University

Rachael Weldon-Caron serves as the Assistant Vice President for TRIO Programs and First-Generation Initiatives at Tarleton State University, where she provides strategic leadership for federally funded TRIO programs and institutional first-generation student success initiatives. In this role, she oversees program administration, strategic planning, grant management, compliance, assessment, and cross-campus collaboration supporting first-generation, low-income student populations. She also serves as the institutional lead for First-Generation Initiatives and collaborates nationally with the NASPA Center for First-Generation Student Success.

Ms. Weldon-Caron brings extensive experience in higher education leadership, student affairs administration, TRIO programming, grant management, and student success initiatives. Prior to joining Tarleton State University, she held leadership roles at Texas State University, where she directed TRIO and Student Support Services programs, supervised multidisciplinary teams, managed federal grant operations and multimillion-dollar budgets, and led staff development and training initiatives. Her work has focused on strengthening institutional systems, expanding access to higher education, and developing innovative support structures that promote persistence, retention, and completion among first-generation and low-income students. Throughout her career, Ms. Weldon-Caron has demonstrated a strong commitment to advancing educational access and student success for first-generation and historically underserved populations. She has successfully written and secured multiple U.S. Department of Education TRIO grants totaling more than \$7.2 million and has developed innovative mentoring, workforce development, and transition programs designed to strengthen educational pathways from K–12 through postsecondary education.

Her research and professional interests include first-generation student success, cultural humility in the workplace, intergenerational learning, staff development, mentoring, and the design of educational transition and workforce readiness programs. Ms. Weldon-Caron holds a Master of Education in Management of Technical Education from Texas State University and holds a Bachelor of Science in Management from Park University. She is on track to complete her doctorate in Adult Education at Texas State University by the end of this year.



Qua'Aisa Williams, Ph.D.

Associate Vice President, Learning & Impact, FirstGen Forward

Qua'Aisa Williams (she/her) is the Assistant Vice President of Curriculum and Learning Design at FirstGen Forward, where she has made a meaningful impact since joining in March 2020. As a proud first-generation college graduate and alum of TRIO's Educational Talent Search and Student Support Services,

Qua'Aisa brings both personal and professional dedication to advancing success for first-gen students. Her higher education journey began at Florida State University's Center for Academic Retention and Enhancement (CARE), where she supported summer bridge programs for first-generation and economically disadvantaged students.

Qua'Aisa earned both her M.S. in Higher Education Administration and B.S. in Family & Child Sciences from Florida State University, followed by a Ph.D. in College Student Affairs Administration from the University of Georgia. Her work is driven by her own experiences and commitment to creating equitable opportunities for first-gen students across higher education.

Network Champion Syllabus

Phase Description

Dedicated to transforming their institutions to better support positive outcomes for first-generation students, Network Champions are national exemplars in advancing first-generation student success. Network Champion institutions have invested the time and commitment to actively adopt the continuous improvement model and align their efforts with institutional priorities to guide first-generation students to completion. Dedicated to serving the field, Network Champions continue contributing to an important knowledge community of evidence-based practices meant to enhance institutional buy-in, engage leadership, and scale student support.

While movement from the Network Leader phase to the Network Champion phase signals an important progression, this phase remains a time for active implementation of the continuous improvement principles while emphasizing institution-focused strategic priorities to improve first-generation students' experience and completion rates.

Duration of Network Champion Experience

Three Years (36 months). Near the end of year three, institutions will undergo a reaffirmation review to assess their eligibility for continued Network Champion status.

Network Champion Benefits

- Assignment of a dedicated expert guide for Network Champion institutions;
- Access to proprietary continuous improvement accountability tools meant to bolster support through intentional alignment with institutional strategy;
- A network of institutions with similar priorities and goals related to first-generation student success, with bi-annual virtual convenings;
- Advanced training opportunities to harness the power of the Postsecondary Data Partnership (PDP) dashboards for informed decision-making;
- Ongoing professional development offered through in-person and virtual learning opportunities aligned with specific outcomes, featuring toolkits and e-learning modules;
- Exclusive perks such as discounted or free registration on professional development offerings tailored to first-generation student success include but are not limited to virtual learning and engagement opportunities, live briefings, and short courses.

Network Champion Phase Outcomes

Through active engagement as a Network Champion, institutions will be able to:

<p>Demonstrate Return on Investment and Drive Transformational Change</p>	<p>Lead and implement initiatives to achieve measurable outcomes, demonstrating ROI through the advancement of strategic, institutional, and structural support systems for first-generation students.</p>
<p>Institutional Engagement Across Diverse Stakeholders</p>	<p>Foster engagement across a broad spectrum of stakeholders cultivates sustained involvement, ensures alignment with institutional goals, and enhances a collaborative, supportive culture.</p>
<p>Data-Driven Decision-Making for Scalable Solutions</p>	<p>Address complex challenges, implement evidence-based solutions, monitor progress, and scale efforts effectively across the institution to advance first-generation student success through participation in ongoing data collection and comprehensive assessment, including the analysis of advanced student metrics (e.g., career outcomes and return on investment).</p>
<p>Engagement in Advanced Research and Targeted Professional Development</p>	<p>Adopt evidence-based practices and emerging trends to enhance student success and institutional strategies for first-generation student support; prioritize high-impact research, learning, and development.</p>
<p>Emerge as a National Leader</p>	<p>Through contributions to first-generation research, professional development, and community building through publications, webinars, and presentations, institutions will emerge as a national leader in first-generation student support within the Network and beyond.</p>

Notes

Strategic Priority Milestones

Network Champion Institutions

This section identifies the impactful outcomes of FirstGen Forward's Institution Actionable Priorities to enhance first-generation student success.

Your institutional leadership team is encouraged to reflect on progress made during the Network Champion experience. Evaluate which of these priorities your institution wants to make movement on. Are these actionable priorities currently present in your driver diagram or action plans?

Actionable Priority	Milestone	Completion Status
Continuous Improvement	Utilization of ImproveEDU to develop and maintain Driver Diagram current improvement projects and action tacks.	
Establishing Intentional Alumni, Donor, & Community Relationships	Develop a plan to partner with alumni affairs to engage first-gen alumni in institutional initiatives to support first-generation students throughout the student lifecycle.	
	Develop a plan to partner with the development/foundation department to identify current and potential programmatic and/or scholarship funding specific to first-generation student support or success.	
Demonstrating Return on Investment (ROI)	Initiatives designed or implemented with first-generation students in mind that span the academic career may result in data demonstrating a return on investment and may be considered for scaling across the institution. Institutions must balance new initiatives, current budgets, and the external factors influencing institutional finances. In particular, ROI is a way to gauge proposed program growth and resource allocation. Institutional representatives with budgetary oversight (finance, budgeting, accounting, etc.) will be key partners while working toward this priority.	

Network Leader Foundations

While engaged in the Network Leader phase, your institution advanced based on completion of the actionable priorities outlined below. Although not the focus of the Network Champion phase, your institution is encouraged to maintain ongoing progress in these priorities.

Actionable Priority	Milestone	Completion Status
Aligning Leadership & Institutional Strategy	Attendance at in-person Network Champion Convening.	
	Implement or maintain a cross-divisional decision-making body to lead institutional adoption of first-generation efforts.	
	Audit institutional strategic plan and other key documents to identify opportunities for first-generation alignment and gaps for improvement.	
Mapping & Networking Institutional Efforts & Resources	The institution has a formal first-generation college student definition.	
	First-gen attribute/identifier assigned to first-time incoming first-generation students.	
	First-gen attribute/identifier assigned to continuing first-generation students not initially identified.	
	Complete an institutional mapping exercise that includes: <ol style="list-style-type: none"> 1. specific first-generation programs and services, 2. intersectional programs and services, and 3. use of first-generation definitions. 	
	Identify emerging themes from institutional mapping that contributes to an initial priority list for steering committee consideration.	
	(Plans for) Web presence specific to first-generation students.	
Continuous Improvement	Utilization of ImproveEDU to develop and maintain Driver Diagram current improvement projects and action tacks.	

Actionable Priority	Milestone	Completion Status
Elevating Actionable Data for Decision-making	Complete data mapping to understand what data is collected, how it is stored, who has access and authorization to view it, and how it is used for continuous improvement and assessment.	
	Create a cross-functional data working group to be accountable for analyzing and communicating first-gen data insights to the institutional community.	
	Identify three key momentum metrics (student outcomes that impact student completion rates) to monitor, improve, and incorporate in continuous improvement cycle planning.	
Postsecondary Data Partnership (PDP)	Appropriate Leadership Team members have access to the PDP Dashboard.	
	Utilizing data for decision making.	
Strengthening Institutional Communications	Identify and develop a process to facilitate a comprehensive auditing process (e.g., working group, training the trainer, etc.) Submit a description of the process, and outline the staff involved and their responsibilities.	
	Complete a comprehensive institutional audit of: <ul style="list-style-type: none"> 1. external and internal communications, 2. policies and/or procedures, and 3. career and graduate/professional school preparation offerings for opportunities to eliminate jargon and remove barriers to student success. 	
Fostering Knowledge Across the Institution	Complete a process to identify first-generation faculty, staff, and champions and a mechanism for publicly identifying these individuals.	
	Identify existing and potential opportunities to provide comprehensive training and professional development to equip faculty, staff, and advisors with the skills and knowledge needed to effectively support first-generation college students. This includes providing access to first-gen aggregate data and a list of asset-based approaches.	

Required Experiences

As a Network Champion, an institution commits to continually improving institutional culture and scaling systems. The following requirements ensure continued engagement.

Enroll in the Postsecondary Data Partnership & submit data annually;	Advance priorities through continuous improvement;
Attend fall and spring virtual convenings;	Actively contribute to the Network peer engagement;
Participate in two (2) expert guidance meetings annually and one leadership team meeting;	Sign the participation agreement and submit the annual commitment fee.

Learning Platforms

- Basecamp
- Zoom
- ImproveEDU
- Email
- FirstGen Forward Website
- Calendly

Network Champion Calendar 2026-2027

**Please note that program details and offerings are subject to change. We continuously strive to enhance and adapt our programs to meet our participants' evolving needs and feedback.*

June 2026	6/4	Network Champion Celebratory Welcome Event for the Class of 2026
	6/10-6/11	Network Champion Convening at SSHE 2026
	6/1-6/30	Network Champion Continuous Improvement Cycle, 30 Days
July 2026	7/1 - 7/31	Network Champion Continuous Improvement Cycle, 60 Days
August 2026	8/1 - 8/31	Class of 2026 Leadership Team Meetings
	8/1	PDP Data Submission Deadline
	8/1 - 8/31	Network Champion Continuous Improvement Cycle, 90 Days
September 2026	9/1 - 9/31	Leadership Team Meetings
	9/1 - 9/31	Network Champion CIC Reflection
October 2026	10/1 - 10/31	Network Champion Continuous Improvement Cycle, 30 Days
	10/14	Network Champion Fall Virtual Convening (for All Network Champion Institutions) 1:00 - 2:00 PM ET
November 2026	11/1 - 11/30	Network Champion Expert Guidance Network Champion Continuous Improvement Cycle, 60 Days
	11/8	National First-Generation College Celebration
December 2026	12/1 - 12/23	Network Champion Individual Expert Guidance
	12/1 - 12/31	Network Champion Continuous Improvement Cycle 90 Days
January 2027	1/1 - 1/31	Network Champion CIC Reflection Network Champion Individual Expert Guidance
February 2027	2/1 - 2/28	Network Champion Continuous Improvement Cycle 30 Days

March 2027	3/1 - 3/31	Network Champion Continuous Improvement Cycle 60 Days
	3/17	Network Champion Spring Virtual Convening (for All Network Champion Institutions) 1:00 - 2:00 PM ET
April 2027	4/1 - 4/30	Network Champion Individual Expert Guidance Network Champion Continuous Improvement Cycle 90 Days
May 2027	5/1 - 5/31	Network Champion CIC Reflection Network Champion Spring Expert Guidance
June 2027	6/1 - 6/30	Network Champion Continuous Improvement Cycle 30 Days
	TBA	Network Champion In Person Convening at SSHE 2026
July 2027	7/1 - 7/31	Network Champion Continuous Improvement Cycle 60 Days
August 2027	8/1 - 8/31	Network Champion Continuous Improvement Cycle 90 Days
	8/1 - 8/31	Class of 2026 Leadership Team Meetings
	8/1	PDP Data Submission Deadline
September 2027	9/1 - 9/31	Network Champion CIC Reflection
	9/1 - 9/31	Leadership Team Meetings
October 2027	10/1 - 10/31	Network Champion Continuous Improvement Cycle 30 Days
	10/7	Network Champion Fall Virtual Convening (for All Network Champion Institutions) 1:00 - 2:00 PM ET
November 2027	11/1 - 11/30	Network Champion Individual Expert Guidance Network Champion Continuous Improvement Cycle 60 Days
December 2027		Network Champion Individual Expert Guidance Network Champion Continuous Improvement Cycle 90 Days

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.

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?

First-year Credit Completion Practice: Creating an Action Plan

Background of the Driver Diagram	
Institutional Focus Area	Our institutional focus area is to close achievement gaps between first-gen college students and continuing gen students. Despite some improvements over the past two fall cohorts, there is a clear need for targeted support to enhance retention rates further.
SMART Goals	<p>By Fall 2028, we aim to:</p> <ul style="list-style-type: none"> • Increase first-generation, first-year retention by 2% each year. • Increase first-year credit completion rates. As compared to continuing gen peers who are completing 30 credits per year on average, first-gen, first-year students are completing 22 credits per year on average. • Improve degree completion rates for first-generation students (63%) to more closely align to their continuing generation peers (85%).
Momentum Metrics Identified	<ul style="list-style-type: none"> • First-year credit completion ratio • First to second year retention • Degree completion

Barrier and Improvement Project	
Barrier	Improvement Project
First-gen students are reporting an unclear career path and this is impacting their desire to graduate.	<p>Need to identify data available at the institution that follows first-gen students post graduation/matriculation/stop out.</p> <ul style="list-style-type: none"> • What recommendations can be made to incorporate career services into the student journey? • When are students withdrawing from the institution?

Continuous Improvement Cycle Action Plan

Who needs to be in this workgroup?

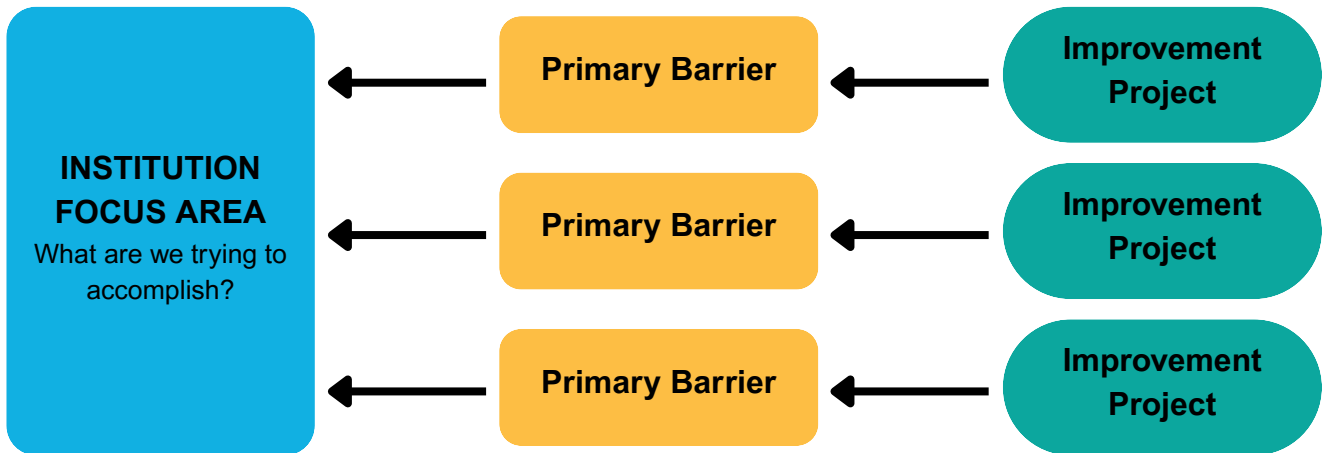
How does this project tie to the SMART Goals?

30 Days

60 Days

90 Days

Driver Diagram-generation Activity



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.)

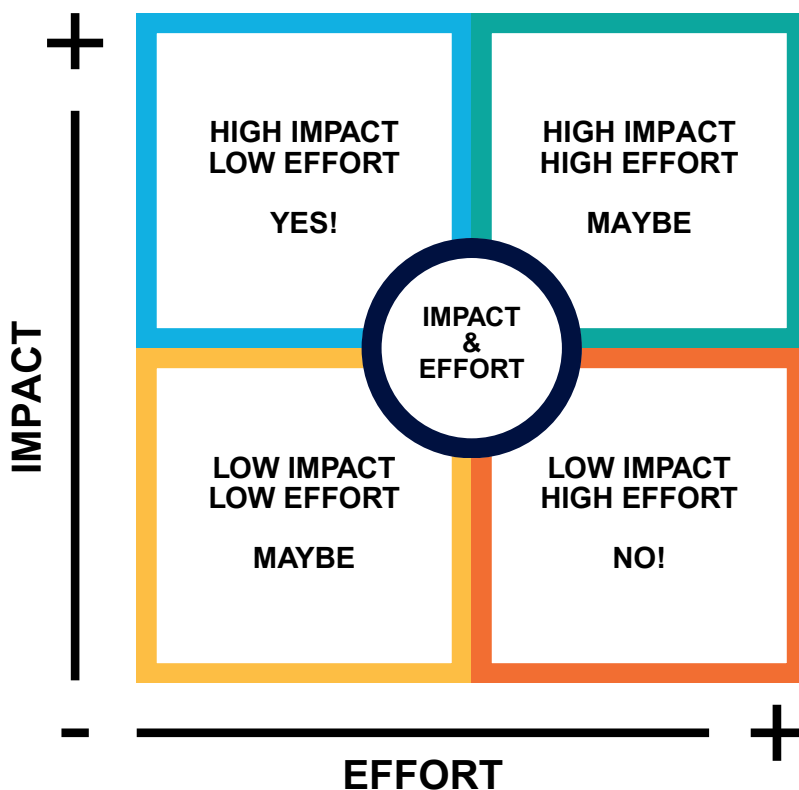
3. Generating Improvement Projects (20-25 minutes; you will need another poster for this part.)

- **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)

Institution Goal-setting Recommendations

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.

- **Option 1:** Increase the graduation rate for first-generation students
- **Option 2:** Decrease the completion rate gap between first-generation students and continuing-generation students
- **Option 3:** Increase the year-to-year retention rates for first-generation students
- **Option 4:** Decrease the year-to-year retention rate gap between first-generation students and continuing-generation students

S.M.A.R.T. Goal

A specific objective set within the broader Institution Focus Area.

- **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.

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.

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)

Driver Diagram Development

STEP ONE: 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, and Insights Tool report.

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 TWO: Primary Barriers

The biggest issues blocking progress toward your goal.

Barrier 1	Brief description of the barrier.
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Barrier 2	Brief description of the barrier.
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Barrier 3	Brief description of the barrier.
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Barrier 4	Brief description of the barrier.
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Barrier 5	Brief description of the barrier.
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STEP THREE: Improvement Projects

The "work" that drives change. The project should directly address a primary barrier.

Barrier 1	Project(s) to address/minimize barrier.
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Barrier 2	Project(s) to address/minimize barrier.
-----------	---

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

Barrier 4	Project(s) to address/minimize barrier.
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Barrier 5	Project(s) to address/minimize barrier.
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STEP FOUR: Improvement Projects

The "work" that drives change. The project should directly address a primary barrier.

Task name:				
Assignee:				
Others Involved:				
Cycle (circle):	30	60	90	
Due Date:				
Comments/Notes:				

Task name:				
Assignee:				
Others Involved:				
Cycle (circle):	30	60	90	
Due Date:				
Comments/Notes:				

Task name:				
Assignee:				
Others Involved:				
Cycle (circle):	30	60	90	
Due Date:				
Comments/Notes:				

STEP Four Improvement Projects

The "work" that drives change. The project should directly address a primary barrier.

Task name:				
Assignee:				
Others Involved:				
Cycle (circle):	30	60	90	
Due Date:				
Comments/Notes:				

Task name:				
Assignee:				
Others Involved:				
Cycle (circle):	30	60	90	
Due Date:				
Comments/Notes:				

Task name:				
Assignee:				
Others Involved:				
Cycle (circle):	30	60	90	
Due Date:				
Comments/Notes:				

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





Contact the FirstGen Forward Network at
Network@FirstGenForward.org



@FirstGenForward
FirstGenForward.org

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