



Transformation

Powered by the Institutional Transformation
Assessment (ITA)

Volume I



**GARDNER
INSTITUTE**

Transformation Powered by the ITA

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My Gardner Institute colleagues and I are grateful to the Gates Foundation for not only designating the Institute as the permanent “home” for the Institutional Transformation Assessment (ITA), but also for providing the support that makes the production and dissemination of this case study publication possible. We extend sincere thanks to our program officer, Johannes DeGruyter, whose guidance shaped and strengthened our work with Transformation powered by the ITA. That thoughtfulness is reflected in the foreword he has contributed to this volume. We are also thankful to ECMC Foundation for its role in advancing our institutional transformation efforts, including scaling ITA across diverse contexts; it is fitting that ECMC’s Drs. Laura Bocche and Stephanie Sowl co-authored the foreword to this publication. We recognize the contributions of Ascendium Education Philanthropies, The Kresge Foundation, and Lumina Foundation for Education, whose support helped bring the work described in these pages to life.

Andrew K. Koch, PhD
Chief Executive Officer
Gardner Institute

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Foreword

Throughout our collective decades in higher education, it has become clear that institutional change is essential for helping students succeed. Many initiatives have aimed to improve student outcomes, but few have focused on reimagining the entire systems and structures that shape those outcomes. That is the focus of this work. As partners at two philanthropic organizations, the Gates Foundation and the ECMC Foundation, we are collaborating with the Gardner Institute to help strengthen the postsecondary field's capacity for student-centered transformation.

At the Gates Foundation, I (Johannes) have worked closely with the Gardner Institute and its Institutional Transformation Assessment (ITA). The Gates Foundation originally created the ITA to help colleges and universities assess their capacity for change. From the outset, the goal was to find a trusted organization that could manage, enhance, and expand the tool to better assist better institutions seeking to pursue transformational change. The Gardner Institute stepped into this role. With years of experience helping campuses improve student outcomes, the Institute brought both trust and expertise. Over time, it has made the ITA more user-friendly, added companion tools, and created processes that make it easier for institutions to act on the insights gained. In this next chapter, I am partnering with my colleagues from ECMC Foundation (Laura and Stephanie), as we share a belief in the importance of supporting institutions as they pursue transformation with tools like the ITA.

At ECMC Foundation, our mission is to improve higher education for career success among underserved populations through evidence-based innovation. ECMC Foundation was an early funder of the transformation work at the Gardner Institute, and we (Laura and Stephanie) clearly saw the potential impact that could come from the ITA, sensemaking, and resulting campus change. The six case studies in this volume – featuring California State University, San Bernardino; Fairmont State University; Louisiana State University, Shreveport; Columbia College Chicago; Mary Baldwin University; and Queensborough Community College - highlight the transformative power of collaboration, data-driven decision-making, and a relentless commitment to student success.

At a time when higher education faces questions about value, affordability, and relevance, these institutions demonstrate that change is not only possible but already underway. They offer real examples of how colleges and universities of different sizes, missions, and contexts can use the ITA to guide their own improvement efforts.

Transformation demands that institutions confront hard truths about their structures, cultures, and practices. Through honest self-assessment using tools like the ITA and the Readiness, Willingness, and Ability (RWA) survey, these colleges and universities have illuminated systemic barriers and identified targeted strategies to meet

the unique needs of their students and communities.

A recurring theme throughout this volume is the importance of sensemaking, bringing together stakeholders from across campus to interpret data, share perspectives, and co-create solutions. Whether it is Fairmont State University's cross-functional Student Success Support Team, Louisiana State University Shreveport's participatory approach to strategy sessions, or Queensborough Community College's inclusive sensemaking meetings, the process of collective reflection and action is central to sustainable change.

Improving outcomes for all learners is at the heart of institutional transformation and aligns with both foundations' missions. Institutions like California State University San Bernardino and Queensborough Community College have made significant strides by redesigning curricular pathways, integrating holistic support services, and fostering cultures of inquiry and data literacy. These efforts go beyond improving metrics. They honor the lived experiences of students and expand access to meaningful opportunities for social and economic mobility.

Innovation flourishes when institutions are willing to challenge the status quo. We know that systemic change can take considerable time and effort, and Mary Baldwin University reinforced the

connection between strategic planning and transformation - each process should reinforce the other, embedding transformation into the culture of the institution. Similarly, during a period of institutional upheaval and disruption, Columbia College Chicago acknowledged systemic barriers for student success, focused on the first-year experience, and observed stable retention rates and reductions in equity gaps across gateway courses.

These case studies stand out for their honesty. They do not suggest that transformation is easy or direct. Instead, you will find accounts of institutions grappling with financial pressures, cultural resistance, enrollment challenges, and shifting student needs. These stories remind us that progress is rarely smooth, but also that perseverance, collaboration, and data-informed decision-making can lead to tangible improvements for learners.

We believe philanthropy works best when it is a partnership built on listening, learning, and sharing what works. Real progress is happening on campuses because faculty, staff, administrators, and students are willing to face challenges and think differently about what is possible. By sharing their stories here, these institutions are helping the entire field move forward.

We hope that, whether you are an institutional leader, policymaker, funder, or practitioner, you will find in these

pages both practical strategies and renewed motivation to pursue transformation in your own context. The challenges facing higher education are complex, but as these case studies show, meaningful change is possible when we work together with purpose, humility, and hope. By sharing these stories, we can catalyze a movement toward more equitable, student-centered, and data-informed postsecondary systems. Let us continue to learn from one another, celebrate our progress, and remain steadfast in our commitment to transforming lives through postsecondary education.

We are deeply grateful to these colleges and universities, to the Gardner Institute, and to everyone committed to advancing this work. May the insights and experiences captured here inspire you to reflect, take bold action when needed, and strengthen our collective efforts to transform higher education – for today's students and for generations to come.

Johannes DeGruyter
Program Officer, Gates Foundation

Laura Bocche
Program Officer, ECMC Foundation

Stephanie Sowl
Associate Director of Research, ECMC Foundation



Introduction

Catalyzing Student Success: Transformation Powered by the ITA

In 2023, after several years of use and innovation with the Institutional Transformation Assessment (ITA), the Gates Foundation selected the Gardner Institute to serve as the permanent home for the tool. This selection was a logical extension of the Institute's decades of experience using and sustaining survey-based approaches to improve student success, as well as its leadership in refining the ITA itself – developing streamlined versions for ease of use and companion tools to extend its value and impact. The Institute also brought a proven record of producing case studies that document and disseminate lessons learned. What follows is the first in a new series of such studies, this one focused specifically on how institutional transformation is shaped and continuously refined by the ways in which institutions apply ITA findings.

The Gardner Institute defines institutional transformation as a comprehensive, strategic effort through which institutions identify and address the changes needed to ensure that all students thrive, complete degrees or credentials of high value, and go on to live productive, fulfilling lives.

Transformation does not result from quick fixes or isolated solutions; it requires sustained commitment over years. As my friend and colleague, Dr. Shirley Malcom, once shared with me during lunch, “Fixed don’t stay fixed.” Within this context, the ITA functions as a critical tool – continuously informing institutions’ strategies and guiding their progress toward achieving and sustaining transformation.

The six featured case studies represent a diverse set of institutions that used the ITA as part of their transformation journeys, each to varying degrees of success. All are currently engaged in the Gardner Institute’s broader Transformation efforts, while also connecting ITA-guided strategies to other institutional priorities and partnerships. These include Title III work at Fairmont State University, collaboration with Complete College America and Louisiana Meauxmentum at Louisiana State University Shreveport (LSUS), alignment with Growing Inland Achievement at California State University San Bernardino (CSUSB), and engagement with Achieving the Dream at Queensborough Community College.

Taken together, these case studies illustrate the ITA’s central role in driving Transformation Powered by the ITA

meaningful change across contexts.

By diagnosing perceptions of systemic barriers and providing a shared framework for action, the ITA enables campuses to align efforts, build capacity, and achieve measurable gains in student success. Collectively, they demonstrate how transformation powered by the ITA can turn aspiration into sustainable impact.

Fairmont State, a regional institution in West Virginia, partnered with the Gardner Institute as part of a Title III grant initiative to shift from a transactional to a transformational approach to student success. With enrollment of more than 3,300 and a first-year retention rate of 64%, the university sought systemic change through the ITA and sensemaking process. Survey results revealed that all transformation elements were in the Developing or Emerging stage, prompting focus on four core principles: Philosophy and Strategic Alignment, Designing for Student Opportunity and Attainment, Institutional Leadership and Knowledge Development, and Organization and Policy. Through broad-based engagement, including faculty, staff, and students, Fairmont State began implementing targeted changes such as improved advising, leadership development, and student-focused services. Early actions included the creation of a first-year resource guide and workshops to define student success, building momentum toward long-term improvements. This case illustrates how the ITA and sensemaking

sensemaking process guided Fairmont State's journey toward embedding transformation across policies, practices, and culture.

At LSUS, the urgent needs of a student body heavily composed of first-generation, Pell-eligible, working, and adult learners in a high-poverty region drove the need for transformation. Challenges with retention, advising, and gateway course success led LSUS to join the Gardner Institute's first transformation cohort in 2023. The ITA exposed systemic barriers and engaged faculty, staff, students, and administrators in collective sensemaking, fostering openness to data-driven dialogue. As a result, LSUS developed an integrated Student Success Framework, redesigned advising into a centralized, professionalized model, and restructured gateway courses with support from a new Center for Excellence in Learning and Teaching. Early results included an 11.3% rise in retention, GPA gains for participants in co-curricular first-year programs, and reductions in DFW rates, particularly for first-generation and Pell-eligible students. By grounding efforts in data, aligning with statewide goals, and embedding high-impact practices, LSUS demonstrated how the ITA can catalyze sustained, systemic transformation.

CSUSB, a Hispanic-Serving Institution with 80% of students from first-generation and underrepresented backgrounds, embraced transformation to address declining enrollment, budget cuts, and student needs amplified by regional disparities. Using the ITA and

Readiness, Willingness, and Ability assessment alongside its own strategic plan, CSUSB aligned transformation efforts with institutional priorities rather than treat them as separate initiatives. Key initiatives included curricular analytics to streamline degree pathways, development of an Academic Intervention Response (AIR) platform for proactive student support, and the redesign of the First-Year Experience into a comprehensive four-year Coyote Experience. Faculty were engaged in data literacy training through a campus-wide Data Roadshow, embedding inquiry into decision-making and instruction.

Despite financial and organizational challenges, CSUSB has begun to see progress through more coherent pathways, timely interventions, and expanded mentoring opportunities. This case highlights how ITA-aligned work can be integrated into strategic planning to strengthen student success in resource-constrained contexts.

Queensborough Community College (QCC), part of the City Colleges of New York (CUNY) System, and one of the most diverse two-year colleges in the nation, engaged the ITA and RWA in 2023 to deepen its understanding of achievement gaps and strengthen institutional readiness for change. With significant disparities in retention and graduation between white/Asian students and Black/Latinx peers, QCC used sensemaking to identify priorities around communication, data literacy, advising, and first-year persistence. Broad participation from faculty, staff, and student affairs professionals informed targeted initiatives, including First-Year Redesign, curricular analytics, and expanded co-curricular career exploration programs. Early efforts included course redesign in high-enrollment introductory classes,

faculty-led academy events, and creation of a data literacy committee. While cultural resistance and capacity challenges remain, QCC has begun embedding ITA findings into concrete interventions, aligning with its mission of academic excellence and social mobility. This case shows how a data-driven, inclusive approach can help a community college tackle persistent achievement gaps.

Columbia College Chicago (Columbia), an urban arts and media institution, entered the ITA process amid profound disruption, including labor strikes, leadership turnover, and enrollment declines. Despite these challenges, the ITA provided a strong case for change, helping faculty and staff collectively acknowledge systemic barriers to student success. Through sensemaking and subsequent engagement with the Gardner Institute, Columbia prioritized redesigning its first-year experience to better integrate academic and student supports. This included smaller, more interactive orientations, a restructured convocation, modules embedded in required first-year courses, and alignment with co-curricular activities. Early results demonstrated stability in retention rates and notable reductions in gaps across race, first-generation status, and Pell eligibility, particularly in gateway courses. Columbia's experience underscores how the ITA can provide a framework for transformation even in the midst of institutional upheaval, reinforcing the importance of data, collaboration, and adaptability.

Mary Baldwin University (MBU), a small institution with multiple sectors, engaged in both strategic planning and the Gardner Institute's ITA process simultaneously in 2024. The undergraduate residential campus faced the steepest challenges, with first-to-second-year retention at 63% and completion rates around 50%, underscoring the need for urgent action. Rather than view strategic planning and transformation separately, MBU intentionally aligned the two efforts, creating a "paceline" effect in which each reinforced the other. Sensemaking translated broad strategic goals into actionable strategies, and Gardner Institute findings now appear explicitly in the strategic plan, signaling board-level commitment. The combined approach fostered collaboration, data-informed decision-making, and a culture more willing to connect across boundaries. By integrating planning and transformation, MBU demonstrated how ITA work can be embedded deeply into institutional culture, ensuring that student success reforms are both sustainable and central to the institution's mission.

Taken together, these case studies demonstrate how the Institutional Transformation Assessment (ITA) powers transformation across contexts, challenges, and missions. From regional public universities and community colleges to urban arts institutions and small private colleges, the ITA has provided a common language, a diagnostic framework, and a strategic pathway for systemic change. By diagnosing barriers, facilitating sensemaking, and translating insights into actionable strategies, the ITA

has enabled campuses to ground decisions in evidence, align a variety of stakeholders, and embed student success reforms into institutional culture. The early outcomes – from higher retention to narrowed performance gaps – show both the promise and the power of the ITA as a driver of sustainable, scalable transformation in American higher education.

As you read these case studies, we invite you to consider how the Gardner Institute's broader Transformation work powered by the ITA might support your institution. Together, we can demonstrate the enduring value of higher education at a time when its role is being closely questioned, and when the enrollment cliff threatens to further challenge institutional sustainability and student opportunity. We welcome the chance to partner in advancing systemic change so that all learners thrive, earn high-value postsecondary credentials, and go on to live productive and rewarding lives.

Andrew K. Koch, PhD
Chief Executive Officer
Gardner Institute
October 1, 2025



What is the ITA?

The Institutional Transformation Assessment (ITA) is a survey instrument designed to spark reflection and facilitation that will empower colleges and universities to take a clear, data-informed look at their student success efforts. Through perception surveys, analysis, and guided dialogue, the ITA and sensemaking meetings enable institutions to identify strengths, improvement opportunities, and shared priorities for change.

Each participating campus receives customized reports that inform a Sensemaking Conversation, turning data into collective understanding and direction. In Figure 1 below, the ITA assesses eleven integrated topic areas, including Pathways (both 2- and 4-year), Advising, Leadership and Culture, Digital Learning, and Institutional Policy.

Developed in 2016 and refined through user feedback, the full version of the ITA includes more than one hundred indicators, interactive dashboards, and facilitation guides. The Gardner Institute also offers a shorter version of the survey designed for use cases where the longer version may be prohibitive. Hosted by the Gardner Institute, it is used annually by more than one hundred institutions committed to student success and systemic institutional transformation.

Two key differences related to the Gardner Institute's use of the ITA include a focus on campus culture, via the Readiness Willingness and Ability Survey (RWA), and the incorporation of guiding principles for Institutional Transformation. The RWA, designed

Figure 1



in partnership between the Gardner Institute and the Evaluation Learning and Research Center at Purdue University layers stakeholder perceptions on change management, resources availability, and personal and structural efficacy associated with undertaking large-scale change for student success.

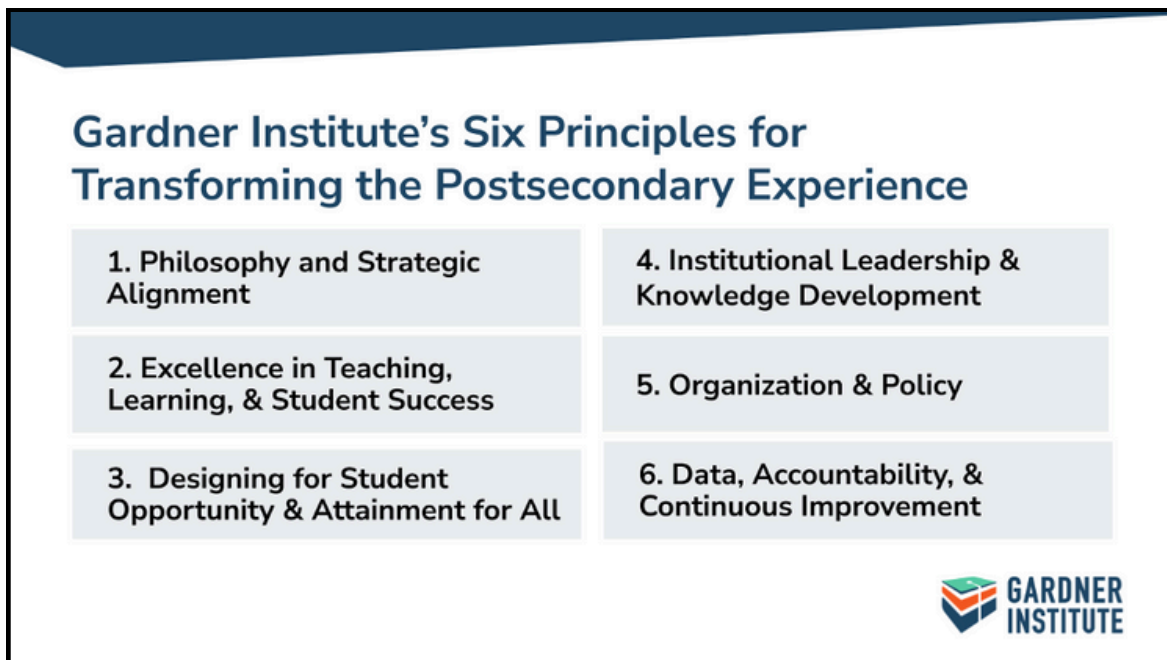
Two key differences related to the Gardner Institute's use of the ITA include a focus on campus culture, via the Readiness Willingness and Ability Survey (RWA), and the incorporation of guiding principles for Institutional Transformation. The RWA, designed in partnership between the Gardner Institute and the Evaluation Learning and Research Center at Purdue University layers stakeholder perceptions on change management, resources availability, and personal and structural efficacy associated with undertaking large-scale change for student success.

How does the ITA work?

Two groups participate in the ITA process. The Transformation Team, composed of campus leaders, completes the full survey and leads Sensemaking. A broader Student Success Community of faculty and staff provides additional perspective through an abbreviated survey. The ITA invites respondents to rate student success capacities and institutional systems across a scale in order to help institutions identify systemic strength and opportunities for institutional transformation.

Responses are scored using a four-level rubric: Emerging, Developing, Accomplished, and Exemplary. At the Gardner Institute, ITA topics are organized according to the Gardner Institute's Six Transformation Principles, which provide a framework for understanding results and guiding action:

1. Philosophy and Strategic Alignment
2. Teaching, Learning, and Student Success
3. Designing for Opportunity and Attainment for All
4. Leadership and Knowledge Development
5. Organization and Policy
6. Data, Accountability, and Continuous Improvement



This structure helps institutions connect specific findings to broader goals for sustainable transformation.

What is Sensemaking?

Sensemaking is a facilitated focus group discussion that spans two days. The meeting brings together leaders, practitioners, and stakeholders to review and consider ITA and Readiness, Willingness, and Ability (RWA) findings and set priorities.

On Day 1, participants clarify purpose, review data, and discuss capacities and challenges. On Day 2, they identify priorities and define next steps, governance links, and accountability measures.

The RWA framework supports the process by adding perception data on:

- Readiness examines leadership's capacity to guide change.
- Willingness reflects motivation and perceived benefit.
- Ability assesses available resources.
- Effectiveness evaluates effort and impact.

Together, these insights focus institutional energy where progress is most achievable.

How does a survey lead to transformation?

The ITA begins by visualizing strengths and gaps across eleven topic areas, revealing cross-campus patterns. During Sensemaking, the Transformation Team integrates ITA and RWA findings to identify a short list of high-impact priorities and longer term plans for intentional improvement. Facilitators then guide the creation of a Transformation Roadmap that defines timing, accountability, and outcome measures.

Over time, campuses revisit results, track progress, and document how practices evolve from Emerging toward Exemplary. Through reflection, data, and collaboration, the ITA turns perception data into progress and progress into sustainable institutional change.

From Reflection to Action: Six Stories of Transformation

The six case studies that follow illustrate how the ITA powers transformation across diverse contexts. Each institution used ITA insights to diagnose barriers, align strategies, and achieve measurable improvements in student success. Together, they show how transformation powered by the ITA enables campuses to turn insight into action and ensure all students have the opportunity to thrive.



Breaking Barriers:

Transforming the Student Experience for
Greater Success

BY: DEDRA COBB & VALERIE MORPHEW



FAIRMONT STATE
UNIVERSITY™

Executive Summary

Fairmont State University's commitment to transformation is clearly expressed in its mission statement: "Fairmont State University educates engaged citizens in a community distinguished by opportunity, growth, and achievement, delivering transformational impact for West Virginia and beyond." With the guidance of the Gardner Institute, and through funding by a Title III grant (P031A230090), faculty, staff, administrators, and students have experienced transformation through the sensemaking process and what has followed. This case study chronicles the journey from before surveying, through sensemaking, and beyond, and is a testament to how real transformation is within reach for any institution committed to this pursuit.



Why Transform: Institutional Context and Challenges

Fairmont State University was founded in 1865 as a Normal School and is the 3rd largest higher education institution in West Virginia. As a regional institution, most of its students come from West Virginia. Fairmont State has a student-to-faculty ratio of 12 to 1 (National Center for Education Statistics, 2025). Associate's, bachelor's, and master's degrees are offered to its students (Fairmont State University, 2025a). Enrollment is greater than 3300 (National Center for Education Statistics, 2025). With retention rates for first-time, full-time students pursuing bachelor's degrees at Fairmont State University at 64% (National Center for Education Statistics, 2025), we felt the need to move from a transactional to a transformational approach to addressing student success and retention.

We define transactional as the focus on compliance, performance, and measurable outcomes such as deadlines, grading rubrics, and standardized curricula and transformational as the focus on developing the whole person—inspiring meaningful learning and personal growth by empowering the student, [encouraging them to focus on] critical thinking, and [their] long-term goals.

Our mission statement emphasizes Fairmont State University's commitment to transformation: "Fairmont State University educates engaged citizens in a community distinguished by opportunity, growth, and achievement, delivering transformational impact for West Virginia and beyond" (Fairmont State University, 2025b). Fairmont State University's mission is supported by the Title III grant, Bridging the Gap for Underserved Students: Constructing a Comprehensive and Integrated Infrastructure for Student Success at Fairmont State University

(P031A230090) (Fairmont State University, 2023). The grant, funded for five years for over 2.2 million dollars, has taken a cross-functional approach to change management so that stakeholders from various units can contribute to ensuring student success.

As a part of the Title III grant, Fairmont State University hired a Student Success Coordinator under the Connecting Resources pillar with the goal of supporting “holistic student success by ensuring access to needed services” (Fairmont State University, 2023. p. 13). Although there are several charges within the grant, conducting a gap analysis required prompt attention from the Title III Project Director and the Student Success Coordinator in Year 1.

We brought this sense of urgency to the attention of the Student Success Support Team, and with their recommendations, we approached three different groups to submit a bid for the gap analysis as this is the required process for Fairmont State University to secure outside consultants. In collaboration with the Student Success Support Team, comprised of faculty and staff, a collective decision was made to request assistance from the Gardner Institute. This collaboration was an early win for Title III grant efforts, as it demonstrated a cross-functional alliance of individuals whose roles were responsible for increasing student success and retention. The Student Success Support Team, which later added students as team members, meets regularly and makes recommendations to the Provost regarding professional development, retention,

and student success initiatives. As recommended by the Gardner Institute, we plan to include the Student Success Support Team’s efforts and initiatives with other units across campus with the hopes of breaking down barriers (silos).



64%
Retention rates for first-time,
full-time students pursuing
bachelor's degrees

One of the Title III grant charges is “to conduct an assessment and gap analysis considering current best practices related to all facets of student services, retention practices, and student success initiatives (Y1)” (Fairmont State University, 2023, p. 23). The Gardner Institute recommended the ITA/RWA process, as the process would address what was required as part of the grant—identifying current practices important to student success and making recommendations for future best practices.

The Gardner Institute team began the survey process in September 2024 and joined us in-person in October 2024 for the sensemaking process. The two teams who participated included the Fairmont State University Leadership Team, comprised of the University President and his cabinet, and the Student Success Community Team, comprised of staff directly related to student success and faculty who had expressed interest in the success of our students. Each team had representation from across campus including administration, faculty, and staff.

The ITA survey was distributed to both teams with a participation rate of 61% from the Leadership Team, and a participation rate of 78% from the Student Success Community Team.

Survey results showed that none of the ITA capacity scores were above an average of 3.0. Each of the elements assessed scored in the Developing stage and below with several in the Emerging stage for the Leadership Team and the Student Success Community Team. Although we did not distribute the ITA survey to students, we did include them in the Sensemaking process. Students were then asked to participate in future discussions centered around the results of the Sensemaking process.



The survey results helped guide the decision to focus on four of the six principles for transformation during the sensemaking process.

The four principles are as follows: Philosophy and Strategic Alignment, Designing for Student Opportunity and Attainment for All, Institutional Leadership and Knowledge Development, and Organization and Policy. These principles were the core focus of the two-day sensemaking process.

Participants were given a chance to contribute input and have their voices heard. This type of cross-functional collaboration had not been practiced in recent years, which demonstrates another transformational process that not only affects students, but also the culture and morale of the University.

As a part of the sensemaking report, the Gardner Institute aligned our findings for each transformative principle with the university's strategic vision as outlined in Figure 1.



“

Participants were given a chance to contribute input and have their voices heard. This type of cross-functional collaboration had not been practiced in recent years, which demonstrates another transformational process that not only affects students, but also the culture and morale of the University.

”

Figure 1

Focus Area	Core Insight	Strategic Imperative	Aligned Actions / Recommendations
Organization & Policy Fairmont Strategic Vision Plan Alignment: Strategic Vision, Budget & Finance Plan, Student Affairs Plan	Systems and policies are fragmented and unclear	Align organizational structures and clarify policies	• Create a centralized policy repository • Establish clear SOPs and accountability • Ensure reorganization supports communication and coordination
Philosophy & Strategic Alignment Fairmont Strategic Vision Plan Alignment: Budget & Finance Plan, Strategic Vision	A shared vision of student success is undefined and inconsistently applied	Define and operationalize a unified student success philosophy	• Embed “student success” in all strategic plans • Integrate vision into onboarding and communications • Ensure collaboration reflects institutional values
Designing for Student Opportunity & Attainment Fairmont Strategic Vision Plan Alignment: Enrollment Management Plan, Student Affairs Plan, Academic Plan, Strategic Vision	Student services are reactive, disconnected, and under-resourced	Build a student-receptive infrastructure	• Develop a comprehensive first-year experience • Unify advising practices and improve onboarding • Strengthen wraparound services and remove silos
Institutional Leadership & Knowledge Development Fairmont Strategic Vision Plan Alignment: Institutional Effectiveness Plan, Information Technology Plan, Human Capital Plan, Academic Plan, Campus Plan, Strategic Vision	Leadership turnover and uneven training limit sustained progress	Build leadership capacity and institutional memory	• Expand leadership development at all levels • Support data-informed decision-making • Strengthen assessment infrastructure campus-wide

Early Action and Impact

Fairmont State University is still early in the process of implementing the recommendations and findings produced from the ITA/RWA process. The results were shared with the Leadership Team and the President. Per the President's recommendation, the results were subsequently shared with a few members of the Strategic Planning Process Committee (SPPC) to align the Sensemaking results with the strategic vision and forthcoming strategic plan. Currently, the Title III Project Director and the Student Success Coordinator, with the guidance of the ITA/RWA report, are collaborating with the SPPC to align the efforts and initiatives in the Title III grant with the plans outlined in our strategic plan.

To keep the momentum, and with the Gardner Institute's sensemaking and transformation reports as guides, we have conducted several workshops and events to address the "gaps" identified during the ITA/RWA process. For example, in March 2025, the Student Success Coordinator held a Lunch and Learn event, supported by the University's Center for Teaching and Learning Innovation (CTLI), to revisit and focus on our first two transformative principles and define student success, which was identified by Gardner Institute as a quick win. This event was open to all campus constituents and conducted in a similar manner to the RWA workshops to encourage collaboration with a focus on bridging the gap between units. Our work continues, but we have prioritized our areas of focus for the next several months.

A "quick win" identified by Gardner Institute (2024b) was to develop a first-year resource guide led by the Student Empowerment Liaisons, also known as SELs. In response, another initiative included the creation of a table-top campus resources display.



Students, faculty, and staff expressed a need for an easily accessible guide to all the campus resources/services offered at the University. The SELs, who serve in the student ambassador program created under the Title III grant, designed and created a 3-D table-top display. With the approval and support of the Student Success Support Team, the displays were distributed across campus in high-traffic areas.



quick win

- First-year resource guide led by Student Empowerment Liaisons
- Held a Lunch and Learn to revisit and focus on our first two transformative principles and define student success.

Results, Reflections, and Next Steps

Through the support of Title III, we have also planned for several external speakers to join us in August and September 2025 to discuss and focus on areas identified by the two teams during the Sensemaking process. Dr. Brian Beatty, author of *Hybrid-Flexible Course Design: Implementing Student-Directed Hybrid Classes* (2019), will be joining us to speak about his research including social interaction in online learning, developing instructional design theory for Hybrid-Flexible learning environments, and the use of GenAI to support student engagement and the design of learning experiences.

Dr. Jenny Bloom will be joining us to conduct a 3-hour workshop on Appreciative Advising, a theory-to-practice framework for building trusting relationships with students, coworkers, and more. The presentation is based on the book, *The Appreciative Advising Revolution* (2008), which the presenter co-authored with Dr. Bryant Hutson and Dr. Ye He.



Photo by Allison Shelley/Complete College Photo Library

"The sensemaking process, along with the commitment and participation it inspired, produced outcomes beyond what I could have imagined. The structured reflection and collaborative approach made all the difference. This process works, and I would encourage anyone who wants to better understand and support their students to engage fully in the sensemaking process." Dedra Cobb, Student Success Coordinator.

The value of the Gardner Institute's guidance in helping promote transformative experiences is echoed by the Title III Project Director, Dr. Valerie Morpew: "The entire process, from surveying to sensemaking, has been transformative. We are seeking ways to continue the effort that's been started, and we hope the work of the Gardner Institute will play a pivotal and prominent role in what follows."

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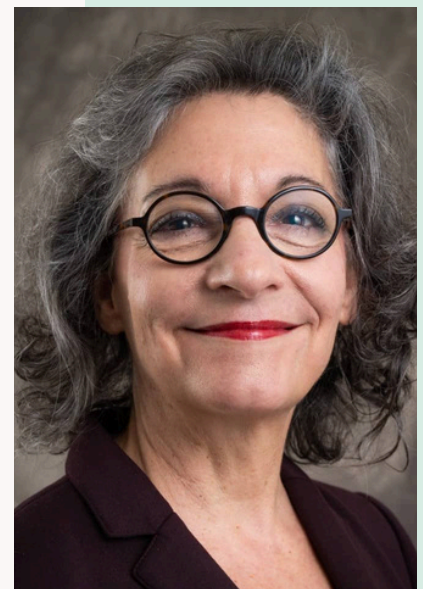


Dedra Cobb,
Student Success
Coordinator

Dedra Cobb returned “Home” to Fairmont State University in April 2024 as a Student Success Coordinator established under the institution’s Title III grant. Her journey in higher education began in 2007 when she started academic advising as a graduate assistant at Fairmont State University. She quickly discovered that the experience and skills she was getting could be used to advise students in a higher education setting. Her deep commitment to student success, engaging, and collaborating with students followed her for 13 years as an academic advisor and a director of advising for the College of Liberal Arts. In September 2021 her journey took her to WVU where she spent 3.5 years as a senior academic advisor for the School of Nursing. During her time at both institutions her student-centered approach, professional development and experience helped many students reach their fullest potential. She continues supporting students and their success in her new role.

Dr. Valerie Morphew, Assistant Provost for Teaching and Learning Innovation, is the Director of the Center for Teaching and Learning Innovation (CTLI). She has served at Fairmont State University since 2000. In addition to directing the CTLI, Dr. Morphew is the Title III Project Director. Dr. Morphew’s expertise is in the areas of instructional design, technology, curriculum development, and project management.

Valerie Morphew,
Assistant Provost
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Learning
Innovation





From Insight to Action:

LSUS's Data-Driven Transformation to Redefine Student Success

BY: ANGIE PELERIN, MA, MS, LPC-S & HELEN WISE, PH.D.



Executive Summary

At Louisiana State University Shreveport (LSUS), the pursuit of student success is undergoing a transformation – one shaped by data, driven by collaboration, and focused on student opportunity. A public regional comprehensive institution located in northwest Louisiana, LSUS serves a student body that reflects the complex realities of modern higher education, highlighted below:

- Shreveport-Bossier is designated as a high-poverty region, with a poverty rate of 24.5%, considerably higher than the state (18.9%) and national (12.5%) averages (U.S. Census Bureau, 2023)
- Nearly half (46%) of all undergraduate students qualify as Pell-eligible, with 3% further qualifying for Federal Supplemental Educational Opportunity Grant (FSEOG) based on low-income status (2025 data)
- Over half (53.2%) of face-to-face, first-year students identify as first-generation college students (Fall 2024 cohort)
- More than 27% of undergraduate students are aged 25 or older
- Over 80% of students work more than 30 hours per week (internal survey data)
- Most face-to-face undergraduates are regional natives, with approximately 69% commuting from within a 70-mile radius (2025 data)

Within this context, LSUS has been nationally recognized as the top institution in Louisiana and among the top 20% nationally for improving the economic mobility of its graduates (Third Way, 2023). Despite these accolades, the high percentage of lower-income, first-generation, and adult learners balancing work, family, and academics underscores a vital institutional responsibility to redesign systems to better support our students.

Why Transform: Institutional Context and Challenges

The need for large-scale change was clear. The institution has faced significant challenges with first-year retention, gateway course completion, and timely graduation. Advising systems were fragmented, and curriculum pathways lacked clarity. Rather than addressing these challenges in isolation, LSUS chose to approach transformation holistically to better support the students we serve. In Fall 2023, the university joined the first cohort in the Gardner Institute's Transforming the Postsecondary Experience™ initiative. Fueled by the Institutional Transformation Assessment (ITA) and a series of structured sensemaking and strategy sessions, the institution took a hard look at itself.

COMPLETE COLLEGE AMERICA

In 2023, Louisiana State University Shreveport (LSUS) joined seven other Louisiana colleges as a member of the Complete College America (CCA) Accelerator. LSUS quickly emerged as an exemplar institution, demonstrating how intentional engagement with data can drive meaningful transformation. The LSUS team leveraged insights from the Institutional Transformation Assessment (ITA) alongside their own student outcomes data to identify and dismantle institutional barriers impeding student success.

What distinguished LSUS was their willingness to use ITA findings as a catalyst for difficult but necessary conversations. In partnership with CCA, the team candidly examined the realities of their students' needs, acknowledged institutional shortcomings, and committed to actionable changes in policies and practices. This data-informed approach and commitment from the faculty and staff enabled LSUS to move beyond surface-level adjustments toward systemic reforms designed to better serve their students and improve completion outcomes.



Fueled by the Institutional Transformation Assessment (ITA) and a series of structured sensemaking and strategy sessions, the institution took a hard look at itself.

Laying the Groundwork: Facing Institutional Truths

Prior to partnering with the Gardner Institute, LSUS leaders had already begun efforts toward transformation during which the institution began to acknowledge several hard truths:

POOR RETENTION AND COMPLETION RATES

First-year retention hovering at between 61% to 65% for over a decade (2010-2022 cohorts); low five-year graduation rates ranging between 31.4% and 37.8% (2013-2017 cohorts)

UNDERPREPARED STUDENTS

Many students start college without adequate support or preparation due to gaps in foundational knowledge, essential technology skills, or unfamiliarity with college systems, leading to distress and poor outcomes.

LOW SERVICE UTILIZATION

Support services were underutilized due to students' complex realities and limited after-hours access. The opening of the Student Success Center in 2017 had little impact on improving retention.

RISK FACTORS

The complex lives of lower income, working, and adult learners and the commuter nature of campus hinder community-building. Combined with the requirement to enroll full-time to retain scholarships, attempts to balance life obligations and academics further complicate students' path to success.

Evaluating these insights revealed a central theme:

the institution itself often exacerbates systemic barriers to student success. Broad structural changes were needed, including adopting a holistic view of students and breaking down campus silos.

Partnership for Transformation

Another key insight from our internal transformation efforts was that we couldn't do it alone. In fall 2023, LSUS chose to join the first cohort of the Gardner Institute's Transforming the Postsecondary Experience™ initiative. The partnership commenced with an intensive assessment process that fostered deep engagement across the campus community. Serving as a foundation for the sensemaking stage, the Institutional Transformation Assessment (ITA) acted as a diagnostic tool, illuminating systemic barriers and fostering a shared understanding of our realities. It became the cornerstone that inspired data-informed conversations, revealing the stories behind the numbers and guiding targeted strategies.

Faculty, staff, students, and administrators all contributed to the ITA, serving as mirrors reflecting the institution's strengths and challenges. Facilitated discussions then centered on key themes such as advising, curricular pathways, digital learning, and basic needs insecurities.

For LSUS, the ITA functioned as a catalyst for open dialogue, breaking down defenses and encouraging collective sensemaking. By creating a safe environment where faculty and staff can explore personal and institutional narratives without judgment, the ITA supports recognizing interconnectedness and challenging existing beliefs that function as barriers to change. Perhaps most significantly, including students in the sensemaking discussion – the very stakeholders we are here to serve – turned this process into a powerful starting point for real transformation.



By creating a safe environment where faculty and staff can explore personal and institutional narratives without judgment, the ITA supports recognizing interconnectedness and challenging existing beliefs that function as barriers to change.

The sensemaking and strategy sessions revealed shared frustrations but also ignited new energy and ideas for improvement. Among the most striking findings were:

- Many well-intentioned policies were either inconsistently applied or poorly understood.
- Advising was inconsistent, reactive, and unclear, leaving students feeling as though they lacked meaningful guidance and support in navigating their academic journey.
- Assumptions about student behaviors overlooked fundamental needs and a lack of institutional knowledge, including limited opportunities to learn how campus systems work.
- Faculty and staff expressed a desire to use data to inform decisions but often lacked the necessary tools or training.
- Despite a history of siloed work, there was a strong, shared appetite for structured, data-informed collaboration.

These insights reaffirmed a fundamental truth: LSUS has the will to improve, but it needs the right structure, support, and shared understanding to succeed.

Sensemaking to Engagement: Prioritizing Transformative Action

From Sensemaking to Action: Strategies for Change

The ITA's participatory approach encouraged everyone, from students to leadership, to see themselves as active partners in change, fostering a sense of collective responsibility and hope. Empowered by the sensemaking process, LSUS swiftly moved from reflection to action.

“ The Institutional Transformation Assessment (ITA) acted as a diagnostic tool, illuminating systemic barriers and fostering a shared understanding of our realities. It became the cornerstone that inspired data-informed conversations, revealing the stories behind the numbers and guiding targeted strategies. ”

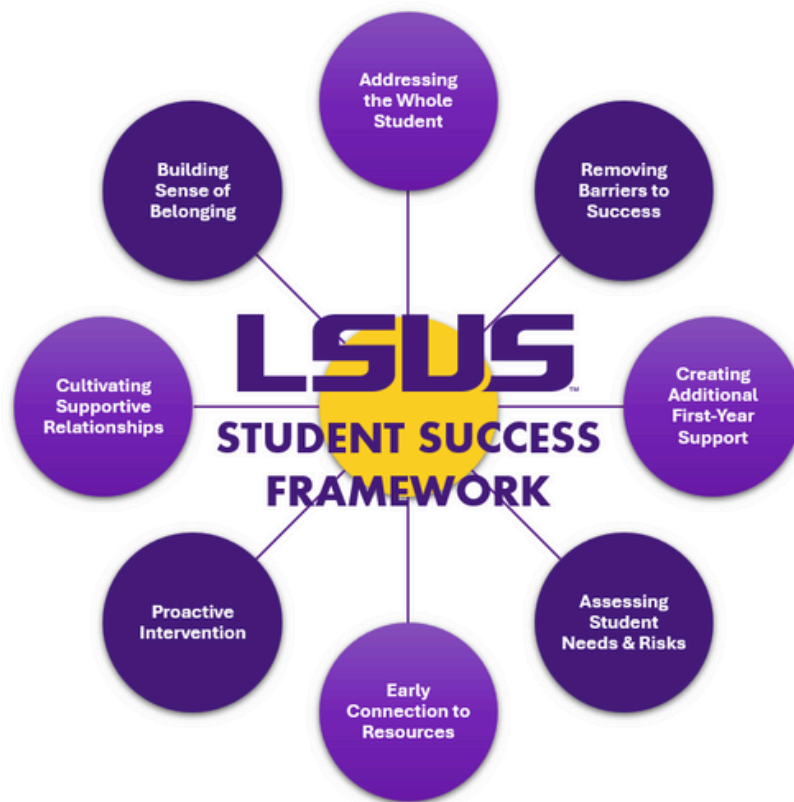
Recognizing the institutional realities uncovered through sensemaking, leaders prioritized addressing the needs of their under-resourced and overextended students. A key innovation was the development of a new integrated Student Success Framework, centered on relationship-driven, holistic support structures embedded throughout the student experience.

Building on this framework, LSUS designed several new student-centered First-Year Experience (FYE) programs and practices aimed at strengthening early intervention, normalizing help-seeking behaviors, and fostering a deeper sense of belonging.

In addition to formalized FYE initiatives, creative partnerships between support services and faculty led to other innovative approaches, such as hosting gateway math classes and faculty office hours within the Student Success Center. These approaches brought essential support directly to students, removing barriers and making support more accessible rather than expecting students to engage with services in their “free” time.

A major shift emerging from the sensemaking process was the needed redesign of the advising model. Data from the ITA exposed challenges within the current decentralized advising system, prompting the institution to undertake a fundamental transformation. LSUS is now transitioning to a centralized advising model, housed under Student Affairs. Once fully integrated, this





new model will be staffed by trained professional advisors committed to holistic, student-centered practices, aiming to provide more consistent, accessible, and proactive support that puts students at the center of their academic journeys.

Simultaneously, LSUS began engaging academic departments in curricular analytics with the Gardner Institute to untangle hidden barriers in course sequencing and degree maps. Departments used these tools to revise prerequisites and eliminate unnecessary bottlenecks. In gateway courses such as introductory math and writing, where failure rates had historically been high, faculty embraced redesign efforts. Additionally, with support from LSUS's newly developed Center for Excellence in Learning and Teaching (CELT), instructors are now encouraged to adopt active learning strategies and incorporate high-impact practices (HIPs) more intentionally into their teaching.

External partners played a key role. The Gardner Institute offered facilitation, curriculum mapping, and leadership training. Complete College America provided technical assistance in assessment, student success strategies, and advising practices. LSUS also aligned its goals with the Meauxmentum Framework, Louisiana's statewide initiative to raise credential attainment to 60 percent by 2030, ensuring that its student-centered approach met both state and student needs.

Early Action and Impact

Early Wins: Evidence of Progress

The impact of these efforts began to emerge quickly. Within months, the campus saw promising results for the Fall 2023 first-year cohort:

- An 11.3% increase in first-to-second-year retention, rising from 61.0% to 72.3%
- A 19.6% increase in first-to-third-year retention, rising from 45.3% to 63.9%.
- Among at-risk students enrolled in a second-semester proactive recovery program (n=40), the first-to-second-year retention rate was 7.1% higher (at 78%) compared to the overall cohort.
- Participants in FYE co-curricular programs earned an average of 0.33 higher GPA in their first semester compared to non-participants.



quick win

+11.3%
Retention

.33
Higher GPA

Influenced by further transformation efforts over the following year, the Fall 2024 first-year cohort saw even more significant gains:

- FYE co-curricular engagement more than doubled, with a 150% increase.
- Participants in FYE co-curricular programs earned an average of 0.63 higher first-semester GPA compared to non-participants, with Pell-eligible students gaining 0.56 points and first-generation students 0.58 points higher than their non-participating peers.
- The percentage of students completing their first year on academic probation decreased by nearly 3%.
- FTFT students enrolled in face-to-face first-year seminar:
 - First-generation students earned a 1.7% higher first-to-second year retention rate (72.5%) than the overall cohort (70.8%), which was also a 7.7% increase compared to the previous year's cohort of first-year first-generation students

+ 150%

**FYE CO-CURRICULAR
ENGAGEMENT**

+ .63

**FYE CO-CURRICULAR
PARTICIPANT GPA**

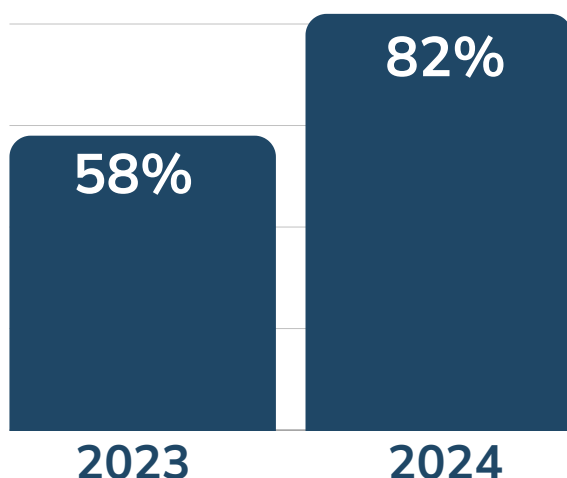
-3%

**ACADEMIC
PROBATION**

Additionally, a new first-generation success program, Rising Pilots, developed through insights gained from LSUS's participation in the Gardner Institute's Retention Academy, yielded similarly promising outcomes. The small cohort of 16 students in Rising Pilots experienced, on average, a 0.11 higher first-semester GPA and a 7.4% greater first-to-second-semester retention rate compared to the overall face-to-face cohort of 281 first-year students. The positive impact was particularly pronounced among students of color, with African American participants (10% or 8 out of 79) achieving a 0.66 higher GPA and Hispanic/Latinx participants (14% or 3 out of 21) a 0.35 higher GPA relative to their non-participating peers.

Gateway course outcomes improved as well. DFW rates dropped by 5 to 7 percentage points. Student responses to the 2024 National Survey on Student Engagement (NSSE) indicated growing satisfaction with academic support structures, with 82% of students reporting knowing where to go for help, up from just 58% the year before.

Student Satisfaction with Academic Support



Students in Rising Pilots experienced, on average:

- **0.11 higher first-semester GPA**
- **7.4% greater first-to-second-semester retention rate compared to the overall face-to-face cohort**

Results, Reflections, and Next Steps

Lessons Learned and a Look Ahead

Reflecting on this transformation, several themes stood out.

What worked? Grounding change in data gave LSUS a shared purpose. External facilitation helped overcome internal fatigue and resistance. By addressing barriers embedded within curriculum and advising structures, rather than solely focusing on student behaviors, the university laid a foundation for long-term, systemic reform. Crucially, this progress was driven by strong leadership from the top. Administration's unwavering backing of the transformation plans, including vocal support for those tasked with implementing change, has been essential. Formalized strategic plans, dedicated financial and human resources, including the creation of new positions and space expansion, have provided the necessary infrastructure to sustain momentum.

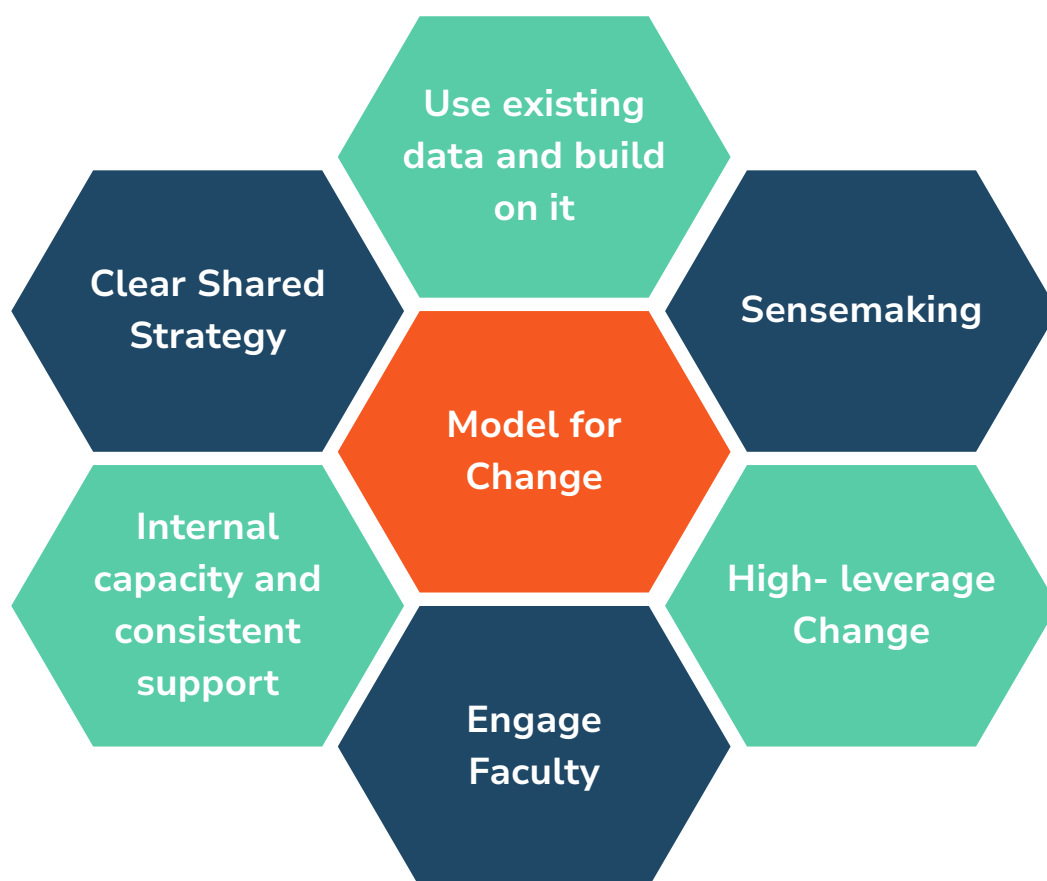


Looking forward, LSUS is committed to maintaining this momentum. The university's Quality Enhancement Plan (QEP) now anchors a campus-wide focus on high-impact teaching and student outcomes. A new Director of Academic Advising has been appointed, and the transition to a centralized advising model is underway. Curricular mapping has been institutionalized as part of the annual program review process. Furthermore, a cross-functional Retention Committee tracks progress and recommends innovative strategies as needed, ensuring that leadership continues to support, sustain, and scale these efforts.

A Model for Others

For peer institutions seeking similar change, LSUS offers a clear message: Start with the data you have, but go beyond it. Use structured sensemaking to uncover context. Focus on targeted, high-leverage changes, such as gateway courses and advising redesign. Engage faculty early and continuously. Leverage faculty champions who are student-centered and willing to be innovative. Sustainable reform requires building internal capacity and consistent support from leadership.

Above all, develop a clear, shared vision that aligns your strategies, energizes your teams, and centers today's students.



Conclusion

At LSUS, transformation is no longer a buzzword. It is a daily practice. It is not about a single program, a new policy, or a strategic plan on paper. It is about a sustained commitment to building an institution and culture where every student, not just the traditionally advantaged, has the opportunity to succeed.

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External facilitation helped overcome internal fatigue and resistance. By addressing barriers embedded within curriculum and advising structures, rather than solely focusing on student behaviors, the university laid a foundation for long-term, systemic reform.

Authors:



**Angie Pellerin, MA,
MS, LPC-S**
Associate Vice
Chancellor for
Student Success,
Division of Student
Affairs

Angie Pellerin has served the LSUS community for over 11 years. In her current role as Associate Vice Chancellor, she is committed to enhancing the holistic development and success of every student while driving transformation efforts at LSUS. She oversees first-year experience, first-generation initiatives, and institutional retention efforts, while guiding career services, academic success, and academic advising offices. Additionally, she contributes to SACSCOC reaffirmation processes and the Quality Enhancement Plan (QEP). With a background in counseling, holistic wellness, and teaching literary studies and composition, she brings experience in student development and neuroscience to her data-driven, student-centered leadership. Leveraging her position with intentionality, she strives to remove systemic barriers and create a supportive ecosystem that fosters belonging and resilience and empowers students.

Helen Wise, Ph.D., serves as Associate Provost at Louisiana State University Shreveport, where she leads academic affairs initiatives focused on accreditation, strategic planning, and instructional quality. With over 25 years of experience as a faculty member and academic leader, she has developed expertise in assessment, curriculum development, faculty development, and institutional effectiveness. Her work centers on advancing student success through data-informed decision-making, high-impact teaching practices, and innovative program design aligned with workforce needs. She has authored and presented on topics including general education reform, faculty engagement in continuous improvement, and strategies for improving retention and graduation rates. Trained as an applied sociologist, she brings a broad understanding of how social, economic, and institutional factors shape higher education. Helen is committed to fostering collaboration among faculty, staff, and community partners to achieve measurable improvements in student learning, program quality, and institutional performance.

Helen Wise, Ph.D.,
Associate Provost





Rooted in the Region, Driven by Purpose

Leveling the Playing Field for Students at
California State University, San Bernardino

BY: KELLY CAMPBELL, PH.D.



Executive Summary

California State University, San Bernardino (CSUSB) serves as a regional hub for access and opportunity, with approximately 80% of students identifying as first-generation and historically underrepresented backgrounds, and most relying on financial aid. Located in Southern California, CSUSB ranks among the nation's top universities for advancing social mobility. A designated Hispanic-Serving Institution, CSUSB remains committed to its mission despite regional challenges such as poverty, high dropout rates, enrollment declines, and budget cuts. Through inclusive strategic planning and its work with the Gardner Institute's "Transforming the Postsecondary Experience™," the university continues to advance transformation.

CSUSB efforts include streamlining degree pathways through the Curricular Analytics program, integrating faculty advisors into student portals for stronger academic connections, and developing an Academic Intervention Response (AIR) platform to deliver timely, individualized support. The First-Year Experience was also redesigned into the four-year Coyote Experience, offering mentoring, co-curricular engagement, and structured guidance for all students. These initiatives are supported by a growing campus culture of inquiry, bolstered by faculty data training and a university-wide Data Roadshow. Although tools such as the ITA and RWA provided helpful baseline data, it was the campus's own strategic plan, rooted in broad engagement and aligned with the 5-year Gardner Institute partnership, that ultimately shaped prioritizations.



Why Transform: Institutional Context and Challenges

CSUSB's urgent need for transformation is driven by structural and operational challenges that affect both employees and students. The transition from quarters to semesters coincided with the onset of COVID-19, forcing faculty to redesign courses and shift to the semester system under intense pressure. Teaching loads increased from three to four courses per term, each requiring approximately 135 hours of labor (e.g., instructional hours, office hours, prep time, grading), leaving little time for research, advising, or service, yet research remains central to tenure and promotion. This mismatch has heightened burnout and disengagement, as reflected in climate survey data collected via UCLA's Higher Education Research Institute. Financial instability has added to these pressures. With enrollment down 7.7% and federal Higher Education Emergency Relief Funds (HEERF) exhausted, CSUSB absorbed a \$4 million budget cut in 2024–25 and anticipates another \$18 million in 2025–26 due to delayed state funding.

These cuts, as well as federal priorities that negatively impacted grant funding, have placed essential student-facing programs at risk, at a time when students need more assistance than ever. Nearly half of incoming students require additional support in Math, 25% require them in English, and many require help in both. Broader disparities play a major role in why students arrive requiring supports, stemming from strained K–12 systems and compounded by challenges often overlooked by traditional metrics, such as housing insecurity, multiple jobs, caregiving responsibilities, mental health struggles, and trauma. In this context, CSUSB's transformation efforts are urgent and deeply personal.

Sensemaking to Engagement: Prioritizing Transformative Action

The Institutional Transformation Assessment (ITA) and subsequent Readiness, Willingness, and Ability (RWA) were initiated during a critical leadership transition. At the time, the vice provost and current Gardner Institute lead had just assumed her interim role, stepping into administration from a long-standing faculty position. Shortly thereafter, Growing Inland Achievement (GIA), a regional K-16 collaborative focused on educational and economic opportunity for all approached her about using the ITA to help identify CSUSB's institutional transformation priorities. The timing, however, proved challenging: the ITA was administered during the summer, a period when many faculty leaders were off contract. As a result, participation was below expectations, and the sensemaking meetings that followed saw modest attendance from campus stakeholders.



Growing Inland Achievement (GIA) uses a collective impact framework to advance cradle to career outcomes in the Inland Empire. Seeking to improve social and economic mobility in the Inland Empire, GIA works toward the goal of “70% of the region’s adults will have a post-secondary degree or credential of value”. To advance this goal, GIA serves as the regional intermediary through Gates Foundation Higher Endeavor initiative, connecting cross sectional and intersegmental partners to create more seamless pathways for students. CSUSB is one of 20 higher education institutions in the Inland Empire that GIA is leading through institutional transformation work targeted toward improving access to and through post-secondary education for the region’s majority population of Black, Latinx, and first-generation students.

GIA and CSUSB’s partnership activities are driven by our shared commitment to breaking down barriers for students to enroll, persist and complete their degrees. In partnership with College Futures Foundation, GIA supported the initial Gardner Foundation project that aligned Chaffey Community College and CSUSB’s coursework for a more seamless transfer experience.

“

The ITA and RWA nevertheless provided important baseline data, revealing our institutional readiness and highlighting critical areas of opportunity to help measure progress over time.

”

Subsequently, the RWA was administered through the Gardner Institute. Both tools were well-intentioned and thorough, but their timing and length limited their overall usability. Compounding these challenges was the fact that CSUSB had just completed an intensive, campus-wide strategic planning process. That process had already yielded a clear set of institutional priorities aligned with student success, opportunity for all, and transformation. Ultimately, the decision was made to rely more heavily on the strategic plan than the survey tools to guide transformation. The ITA and RWA nevertheless provided important baseline data, revealing our institutional readiness and highlighting critical areas of opportunity to help measure progress over time.

After receiving the ITA and RWA results, GIA shared vendor solutions that would be funded via the Gates Foundation, to address emergent issues. However, the recommendations often did not directly align with CSUSB's strategic plan priorities, and campus leaders felt they lacked the bandwidth to engage in additional training or launch action plans disconnected from their most pressing concerns. Recognizing this mismatch, we made a strategic shift.



Instead of reacting to new opportunities, we asked GIA, who was stewarding Gates Foundation funds for regional transformation, to support initiatives that had already been highlighted through our strategic plan. We adopted a similar strategy with the Gardner Institute's Transforming the Postsecondary Experience™, overlaying their program offerings into the appropriate year of our 5-year strategic plan.



Early Action and Impact

Significant strides have been made toward advancing student success, in part due to the CSU system's existing learning goals and enhanced through collaborations with the Gardner Institute and GIA. The College of Natural Sciences was the first to complete the Curricular Analytics program, aimed at streamlining degree pathways. Each college is expected to complete this process before the current strategic plan concludes, with the overall effort anticipated to enhance student retention and graduation rates. Additional campus-wide efforts include the integration of faculty advisors into student portals for direct connections to their academic departments. This addition, which complements the listing of professional advisors who operate on a caseload of approximately 1:650 students, enables students to identify who to reach out to for advice within the major.

Gardner Institute
&
GIA
Collaboration

Faculty and Staff
Support

Culture of inquiry

The university also developed an Academic Intervention Response (AIR) platform to facilitate timely support for students. Instructors can submit a referral through AIR when a student stops attending class, ceases communication, or when they become aware of any issue that may be impacting the student's academic performance. Students can also use the platform to request help for themselves when they are facing academic, financial, or personal challenges. Once a referral is submitted, the student is contacted by their advisor within 24 hours and connected with appropriate campus resources. These may include tutoring, financial aid, or counseling, depending on the student's specific needs. Each year, thousands of AIR referrals are processed, ensuring students receive timely, individualized assistance to stay on track.

Faculty and administrator participation in the Gardner Institute's Data-Informed Community helped advance the university's goal of cultivating a culture of inquiry. We first started by training department chairs and first and second-year faculty on the dashboards available to examine their own DFW rates and retention tools such as Canvas metrics and AIR. Each cohort of trainees had to "favorite" relevant dashboards, subscribe to a report delivered to their inbox with selected frequency, and suggest additional dashboards that could assist in their work. Subsequently, a campus-wide "Data Roadshow" increased awareness of tools available to support decision-making and instruction. This initiative not only helped instructors better understand their individual impact, but also identified institutional data gaps that are now being addressed.



To better support students throughout their undergraduate journey, we redesigned our First-Year Experience (FYE) into a comprehensive, Four-Year Experience. This transformation, guided by the Gardner Institute's Academy on The First College Year and led by a cross-divisional task force, addresses the fragmented and limited scope of our previous model. Previously confined to a single unit and optional participation, the FYE lacked holistic coordination and sustained impact, contributing to noticeable drop-offs in retention from both the first to second year and the second to third. The new Coyote Experience takes a fully integrated, student-centered approach that ensures ongoing academic and developmental support. Key features include Passion Packs, which help students explore their interests, engage in co-curricular activities, and reflect on their growth, as well as assigned mentors who provide both academic and personal guidance. The program is now embedded in block enrollment, making it accessible to all students from the start. Importantly, it extends beyond first-year students to serve all class levels and developmental stages, recognizing that support is critical throughout the entire college journey. With ongoing evaluation and broad campus participation, the Coyote Experience is built to evolve with students' needs, ensuring a more inclusive and sustainable path to success.

Reflections, and Next Steps

While CSUSB continues to face familiar challenges such as low morale, burnout, and a lingering lack of trust between faculty and administration, what consistently propels the work forward is our shared commitment to students. Faculty and staff continue to do the work, even with limited capacity, because they believe every student deserves a real chance at success. Support from the Gardner Institute has also been invaluable because it keeps the work moving forward. Still, capacity remains a hurdle, with inconsistent attendance at community of practice meetings and occasional leadership gaps due to turnover or leave.

Conclusion

CSUSB's transformation journey has been shaped by both structural adversity and a deep institutional commitment to opportunity for all. What has carried us forward through funding cliffs, enrollment dips, faculty burnout, and community trauma has been an unshakable belief that every student, no matter their zip code or life circumstance, deserves a meaningful path to success.

The engine of change has been our people. Their commitment to the work, despite the challenges, stems from our shared vision of transforming lives, and it's that collective purpose at CSUSB that has made our progress possible.



What consistently propels the work forward is our shared commitment to students. Faculty and staff continue to do the work, even with limited capacity, because they believe every student deserves a real chance at success.

Author:

Dr. Kelly Campbell serves as Vice Provost, Accreditation Liaison Officer, and Senior Diversity Officer at California State University, San Bernardino (CSUSB).

A proud first-generation college graduate, she earned her Ph.D. in Child and Family Development from the University of Georgia and her master's and bachelor's degrees from the University of British Columbia. Inspired by the transformative power of education, Dr. Campbell has dedicated her career to ensuring everyone has the opportunity to thrive.

Her portfolio includes oversight of institutional strategic planning, accreditation, academic programs, including the General Education program, University Honors College, and Graduate Studies, academic success and advising, libraries, academic scheduling, and community engagement. Along with her fellow Diversity Officer, she leads the President's Board in achieving the university's inclusive excellence goals. As a professor of psychology, Dr. Campbell conducted relationship research across eight countries, published over 35 peer-reviewed manuscripts and a book on women's sexuality worldwide. Her work has reached the general public through popular media outlets and her radio show/podcast, Let's Talk Relationships. She received CSUSB's highest teaching award, the Golden Apple, and the Outstanding Teaching Award from the International Association for Relationship Research. Dr. Campbell enjoys international travel, delicious food, and spending time with her family.



Kelly Campbell, Ph.D.,
Vice Provost,
Accreditation Liaison
Officer, and Senior
Diversity Officer



Transformation in Motion

Sensemaking, Engagement, and Dynamic Change

BY: PHYLLIS CURTIS-TWEED, PH.D,

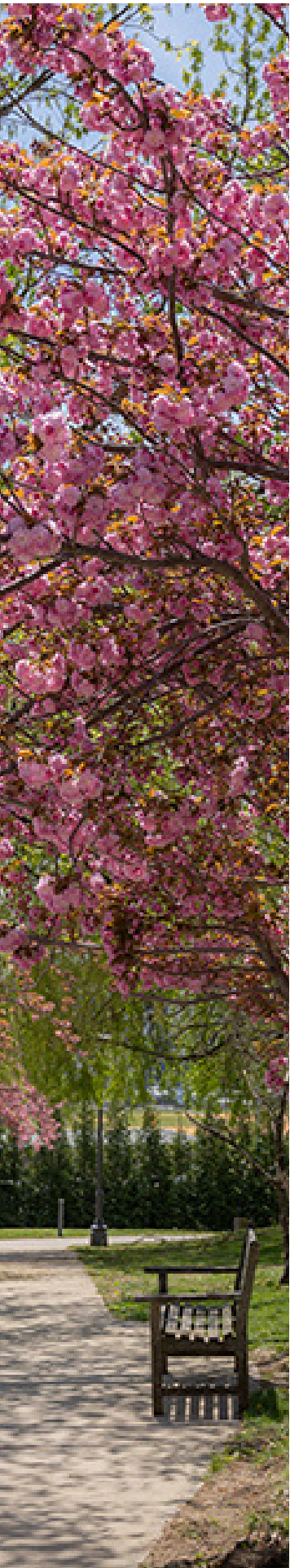


QUEENSBOROUGH
COMMUNITY COLLEGE

**CU
NY**

Executive Summary

This case study tells the story of Queensborough Community College (QCC/CUNY), a public institution with a meaningful strategic plan, strong leadership and a desire to transform the institution to more effectively meet the mission of fostering social mobility and academic excellence for all students. The college engaged with the Gardner Institute's Transforming the Postsecondary Experience™ and benefitted from sensemaking surveys based on the Institutional Transformation Assessment (ITA) and Readiness, Willingness, and Ability assessment (RWA). This led to ongoing work to deeply understand our data, our students, develop strategies and action plans that will ultimately transform the student experience and our institution.



Why Transform: Institutional Context and Challenges

The mission of the City University of New York, since its inception, has focused on academic excellence and social mobility for all students regardless of background.

Queensborough Community College (QCC) of the City University of New York, is a 2-year associate's degree granting public institution located in Bayside, Queens, New York City, with 10,478 students in fall 2024. The student population is extraordinarily diverse boasting 24% of attendees from more than 107 countries outside of the United States, speaking more than 87 different languages and 25% non-native speakers of English. Additionally, approximately 86% of the student population are from communities of color. QCC is an Hispanic Serving Institution (HSI) as designated by the US Department of Education with an Hispanic population of approximately 35%. The total student population is predominantly of traditional age with only 32% aged 24 years and older and 40% first generation college students. Many of the students are economically challenged with 38% with Household Income (HHI) under 30K, 76 percent caring for family members while pursuing a degree, and 34% enrolling as part-time students.

The College's data-driven Strategic Plan (2021-26) articulates 12 goals evenly distributed between themes of campus culture, student engagement, and curriculum and instruction. Data-driven approaches are used to identify challenges and structure targeted plans to enhance student success.

The achievement gap remains one of the most significant challenges, with White and Asian students experiencing higher rates of retention, achievement, and graduation compared to their Black and Latinx peers. Four-year graduation rates from 2020 further underscore the achievement gap. White men graduated at a rate of 31.3%, and White women at 38.3%, while Asian men graduated at 28.5% and Asian women at 39.7%. In contrast, only 15.6% of Black men and 24.1% of Black women graduated within four years, compared to 21.1% of Hispanic men and 28.7% of Hispanic women.

As of 2023, White students made up approximately 7% of the student population, with retention rates of 62.5% for men and 72.9% for women. Asian students, comprising 27% of the population, had even higher retention rates—67.6% for men and 78.9% for women. In contrast, Black and Hispanic students



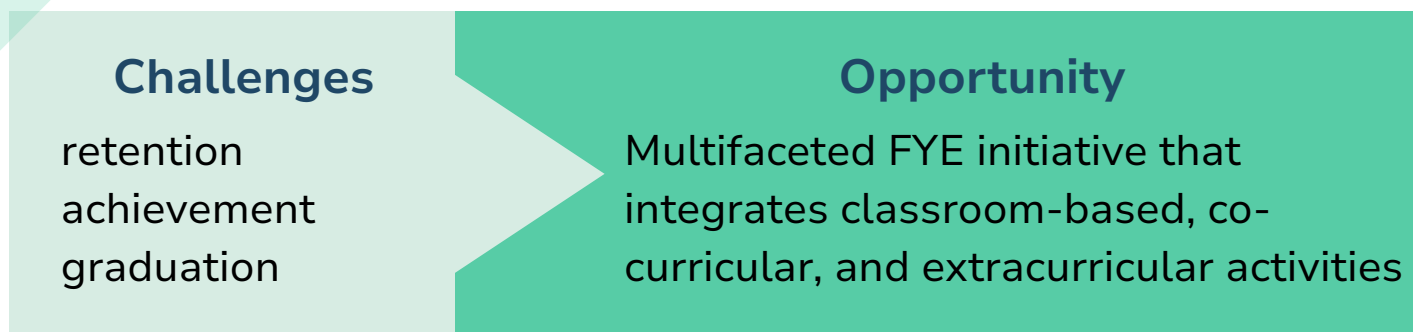
together represented about 66% of the student population but had lower retention rates: 60.9% for Black men and 62.3% for Hispanic men, and 57.2% for Black women and 60.4% for Hispanic women. While there are gender-based differences in retention across all groups, Black men were retained at lower rates than any other male group, and Black and Hispanic women had the lowest retention rates overall.

24% of attendees from more than
107 countries outside of the United
States

College leadership is committed to exploring and understanding the meanings behind the data to structure interventions to support student success, improve outcomes and close the achievement gaps. To address challenges of first year student persistence and retention, QCC has engaged in a multifaceted First Year Experience(FYE) initiative that integrates classroom-based, co-curricular and extracurricular activities to foster student engagement and support during the

critical first year of college. Such efforts include the launch, in 2023, of a Male Resource Center, which offers peer mentoring and other support services for all men, also open to women, and a Student Success Office, which offers a non-credit eight-week First Year Seminar(FYS) workshop in key areas such as academic skills, time management, and navigating campus resources with peer mentoring. Retention rate increases may be attributed in part to the work of the Male Resource Center and Student Success Office.

In summary, QCC focuses on fostering social mobility and offering a quality education for all students, has a data-driven understanding of achievement gaps, and a desire to transform the institution to create a learning environment that supports success for all students. Commensurate with this focus and intervention efforts, QCC enrolled in the Gardner Institute's Transforming the Postsecondary Experience™ in 2023.



Sensemaking to Engagement: Prioritizing Transformative Action

The Institutional Transformation Assessment (ITA) and Readiness, Willingness, and Ability (RWA) instruments are contextual assessments that were conducted in fall 2023 in consultation with the Gardner Institute team to assess the knowledge and readiness of the campus to engage in transformation work. 63 individuals completed the surveys.

Sensemaking meetings were held in November 2023 to share and discuss results. Summaries of the ITA and RWA discussions from those meetings were shared with the community in December 2023. The College continued to review ITA and RWA results in regular cabinet meetings, which are ongoing, and these discussions led to the formation of committees beginning in spring 2024.

Participants in the sensemaking meetings included the President’s Cabinet, leaders from the Office of Academic Affairs, department chairs, and representatives from Continuing Education and Workforce Development, IT, the Registrar’s Office, and Student Affairs. Student Affairs representatives included advisors and staff from college access programs such as the CUNY Accelerated Study in Associate Programs (ASAP) — which offers financial, academic, and personal support as well as structured pathways to help students complete an associate degree within three years — and College Discovery, which provides similar support for students facing educational and economic challenges who might otherwise be unable to attend college.

“QCC focuses on fostering social mobility and offering a quality education for all students, has a data-driven understanding of achievement gaps, and a desire to transform the institution to create a learning environment that supports success for all students.”

All ITA capacities were scored between developing and accomplished with the highest ratings for Developmental Education, IT, and leadership/culture. RWA scores highlighted the college’s readiness and willingness to engage in transformational work with all leadership readiness scores above 3.8, and all student success community willingness scores at 3.5 or higher.

Leadership Readiness



Student Success Community Willingness

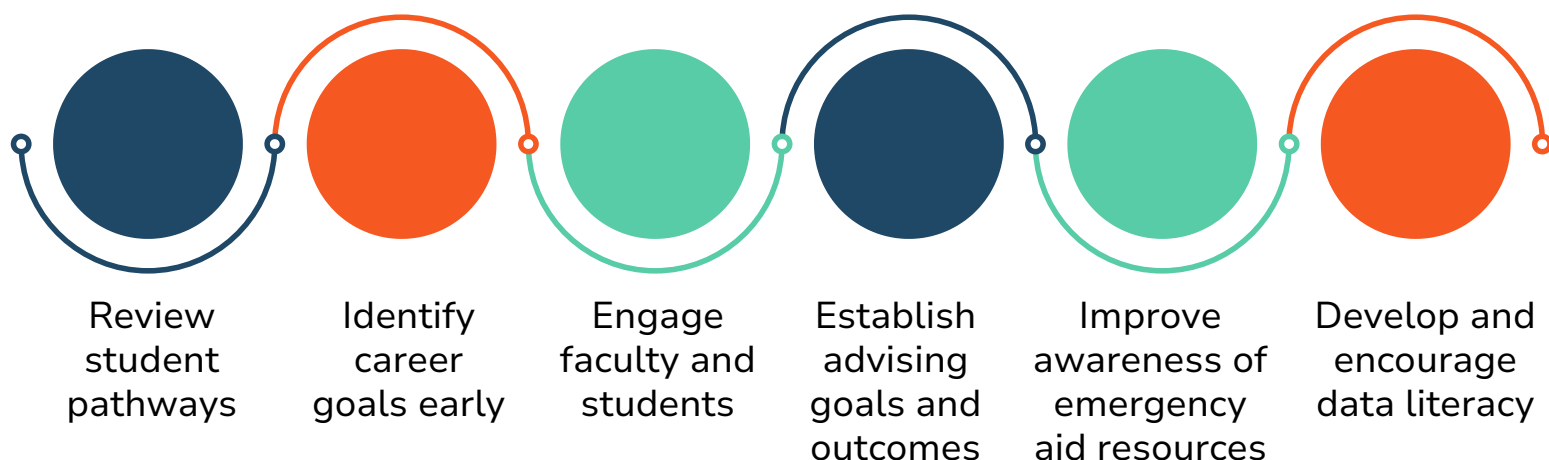


The sensemaking discussion celebrated strengths and focused on areas of opportunity. Sensemaking participants indicated that while the president and cabinet led all innovation efforts, faculty, advisors, middle management and students should be more involved in change efforts and processes. The President continued innovation conversations in monthly extended cabinet meetings bringing in middle managers including advisement and faculty representation.

Sensemaking discussions also suggested the following drivers of change that would require more in-depth analysis and strategy development. For example, reviewing student pathways from entrance to exit, to help students identify career relevance at the start of their college journey, as well as to engage faculty and students in the process to identify issues and barriers related to achievement gaps in retention and achievement. Additional examples include:

- establishing advising goals and outcomes, balancing the caseloads across academic units so students receive a common advisor experience, and engaging faculty and employers earlier in the career experience to improve the process.
- improving communication about and awareness of available emergency aid resources ensuring students know what they are and how to access them in a timely manner.
- developing and encouraging data literacy within the community, widely distributing data and helping the community to understand the data, its availability, and how it impacts everyone's work.

Drivers of Change



To address these drivers of change, starting fall 2023 and/or spring 2024 and continuing, the college engaged in Gardner Institute academies including curricular data analytics, first year course redesign/ Foundations of Excellence, teaching and learning academy for further analysis and professional development. The college also increased IR presence and reporting out of data at meetings and initiated a transparency series which are webinars for the college community on various topics, including the Gardner Institute's Transforming the Postsecondary Experience™.

“

The sensemaking discussion celebrated strengths and focused on areas of opportunity. Sensemaking participants indicated that while the president and cabinet led all innovation efforts, faculty, advisors, middle management and students should be more involved in change efforts and processes.

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Highlights of the subsequent work include the following:

- Participation in the Academy on the First College Year; started in spring 2024, self-study reports have been submitted for 7/9 principles with the remaining two in progress to be completed by fall 2025. In fall 2025, the team will review all recommendations and finalize the action plan.
- The college has initiated a First-Year Course Redesign project. As part of this initiative, 25 faculty members developed modules for high-enrollment introductory courses that are required for most students. These modules are designed to connect course content with career exploration or subject-specific themes relevant to the first-year experience.
- The college reimaged faculty-led academy events—career-focused programs organized by academic major or department, designed to help students learn about career pathways and options, featuring insights from area experts, advisors, and alumni to support students' academic and professional development. There were 36 events with 983 attendees.



Also, the college established a data literacy committee and participated in the Gardner Institute's Building and Sustaining a Data Informed Organization Community literacy group. This group began to hold meetings, but its work was disrupted by the pending retirement of the committee's leadership and is expected to reset in fall 2025.

Participation in
First-Year Redesign

25 Faculty members
developed modules
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course content with
career exploration

36
Faculty-led academy
events with
983 attendees.

Acknowledging the elephant in the room: prospective barriers to change

Communication was a recurrent theme in the sensemaking discussion as a crucial area for growth. Communication should come in multiple modalities to ensure that stakeholders receive and understand the messages, so they can and do also communicate the information to others. Clear communication about changes should also ensure that concepts are understood and include a cross-section of the college community in processes. Such communication was relevant to improving institutional data accountability, institutional leadership knowledge and development, to enhancing faculty and student engagement in all processes and to appraising the community of the status of the college by sharing data, information about initiatives, and related progress.

Communication should also celebrate student successes to foster their sense of confidence, engagement and belonging to the campus community, and provide positive to faculty and staff who are committed to their success. In addition to the concept of communication, the sensemaking discussion also addressed cultural concerns about pockets of resistance to change that could generally present barriers to development, implementation and outcomes. They also expressed concern about capacity and initiative fatigue.

Improve institutional data accountability, leadership knowledge and development, faculty and student engagement

Communication

Celebrate student successes to foster their sense of confidence, engagement and belonging

Communication should also celebrate student successes to foster their sense of confidence, engagement and belonging to the campus community, and provide positive to faculty and staff who are committed to their success. In addition to the concept of communication, the sensemaking discussion also addressed cultural concerns about pockets of resistance to change that could generally present barriers to development, implementation and outcomes. They also expressed concern about capacity and initiative fatigue.

“Communication was a recurrent theme in the sensemaking discussion as a crucial area for growth.”

Early Action and Impact

Intentional Engagement: Building a Collaborative Culture for Curricular Innovation

This initiative began with the formation of a steering committee tasked with exploring improvement science and its relevance to academic programs. This committee was designed to serve as a core team—developing proficiency in using the Curricular Analytics Community tools, interpreting data, and fostering meaningful dialogue about student progression and program effectiveness. The team was also envisioned as a group of peer coaches who could support department chairs and faculty in engaging with the work.

The steering committee included the Provost, the Academic Deans of Faculty, Institutional Effectiveness, and Academic Initiatives; an academic advisor; a representative from the Registrar's Office; and a department chair. The team met regularly to upload programs into the analytics system, review findings, and discuss implications for program improvement.

Recognizing the central role of faculty in curricular transformation, the committee prioritized early and ongoing engagement with department chairs. Initial project updates were shared during cabinet meetings and department chair meetings to build awareness. Over several weeks, individual chairs were invited to attend the steering committee's weekly meetings to review and discuss their specific programs in depth.

A complete sample program analysis was presented at a monthly chairs' meeting with the Provost. Following this presentation, the steering committee held one-on-one sessions with department chairs to delve into the analysis of their programs, discuss potential areas for improvement, and co-create targeted interventions. Chairs were then asked to bring this work back to their departments to facilitate similar analyses and collectively develop improvement strategies.

Data analytics insights:

- The Curricular Analytics tool provides a very useful visual flowchart of the sequence of courses, as well as the degree to which students may be blocked or delayed in their progression if there is a problem with a course.
- Some departments decided to change course sequencing because of the review.
- The impact of high DWFI rates in general education (gen ed) courses was evident in program analyses and provided an opportunity for departments to engage in planning to improve student outcomes.
- The analysis and discussion stimulated additional questions and the examination of data relevant to student outcomes.
- Departments would like to modify the flowcharts for use with students/advisors to reinforce the importance of following the program sequence.

By the end of July 2025, all department chairs had met with the steering committee. Currently, 50% of chairs are actively engaged in discussions within their departments, working on program-level analyses and identifying improvement areas with support from steering committee coaches. According to the project timeline, all academic programs will complete this first phase of analysis by the end of Fall 2025. Half of the programs will begin implementing action plans in Fall 2025, with the remaining programs engaging in the PDSA process during Spring 2026. Program-level interventions based on the insights gained will take place throughout Spring and Fall 2026.



Results, Reflections, and Next Steps

What did we get out of the ITA and RWA?

The ITA and RWA informed meaningful sensemaking discussions that helped clarify the requirements for transformative change at QCC. As is often the case in higher education, this work begins with data and institutional self-reflection to understand who our students are and how they experience our institution. Equally important is assessing our own readiness and willingness to engage in innovative (and sometimes challenging) work.

We found that transformation requires more than new initiatives or isolated improvements; it demands a shared commitment across the campus community to student success developed through intentional processes that both celebrate our strengths and confront our barriers.

One of the most challenging but necessary steps in this work is grappling with cultural constraints whether structural, historical, and/or interpersonal that shape institutional behavior, perception, and identity. Addressing these constraints may, in itself, be one of the most audacious

goals an institution can pursue. And yet, without this step, change may occur but it is likely to fall short of the kind of transformation that redefines who we are and how we serve our students.

The journey toward institutional transformation is complex, but the insights gained through this process reaffirm the value of intentional reflection, courageous dialogue, and collective action.



Author:

Dr. Phyllis Curtis-Tweed earned her Ph.D. in Educational Studies from Emory University, with a focus on educational leadership and issues in psychology, specifically agency development and moral development. She pursued postdoctoral training in psychology in the Clinical Research Training Program in Social Psychiatry at Harvard University, where she also served as an instructor for five years and taught at the Harvard Graduate School of Education, Simmons College, and the Harvard-affiliated Hospitals. She previously served as College-wide Dean at Oakland Community College in Michigan and worked in various capacities at Medgar Evers College, CUNY, including Director of the Freshman Year Programs, Assistant Provost for Student Success and Assessment, and interim Associate Provost.

Dr. Phyllis Curtis-Tweed then served as the Vice President for Academic and Student Affairs at Bermuda College, where she transformed the Division of Nursing into the Division of Nursing and Allied Health. She developed strong relations with community and industry leaders in re/insurance, leading to the development of numerous internships and scholarship opportunities for Bermuda College graduates. She also served as co-editor of Bermuda College's Voices in Education journal. Dr Curtis-Tweed is an Executive Board Member and Treasurer for the Association for Moral Education, and is the co-chair for the Association's Special Interest Group on Race and Social Justice. She has published and presented at national and international conferences on issues in psychology and education, particularly regarding the first year experience.



Phyllis Curtis-Tweed,
Ph.D, Provost and Vice
President of Academic
Affairs



“Where we’ve been, where we go from here”:

**Nimbly Responding to Risk with Institution-
Wide Collaboration**

BY: GREG FOSTER- RICE & NATHAN BAKKUM

Columbia

C O L L E G E C H I C A G O

Executive Summary

As Columbia College Chicago began the process of transformation with the Gardner Institute, in part to address our general interest in better supporting student success, the college experienced a series of acute challenges and changes. Rather than abandon our transformation, we used the process to lean into supporting students through the challenges. While much work remains to be done, we have a better sense of where we've been and where we're going.^[1]

[1] The co-authors would like to acknowledge the song, "Where we've been, where we go from here," which was released by Chicago band Friko in February, 2024, at the height of our college's transformation. Art finds a way of helping us make meaning out of experience; that's part of our pride and joy about working at Columbia College Chicago.



Why Transform: Institutional Context and Challenges

Columbia College Chicago is an urban, arts-and-media-focused institution with more than 4000 students, reflecting the economic, cultural, and educational variety of America's cities. Founded in 1890 by Mary Blood and Ida Morey Riley as a school of oratory, Columbia has grown into a distinctive institution within American higher education. Located in Chicago's South Loop, it admits about 90% of applicants and serves a highly diverse student population: 55% students of color, 50% Pell-eligible, 50% first-generation, 40% LGBTQ+, and 28% Hispanic or Latine. Columbia is a minority-serving institution and the only Hispanic-serving institution (HSI) in the continental United States that also carries the Carnegie classification of Special Focus: Arts, Music, and Design.

Columbia College Chicago aspires to a bold and audacious vision – to deliver an education in contemporary creative practices that challenges exclusionary disciplinary histories, provides access to education for a demographically and socioeconomically diverse population of students in a dense urban environment, and prepares those students to “author the culture of their times.”

Despite that lofty goal, the college has faced challenges with fully supporting the success of every enrolled student. Pedagogically, some of our faculty have positioned us as a proving ground for the cutthroat creative industries, which frequently results in a “sink or swim” mentality to student achievement in the classroom. Financially, like many private, specialized colleges, it has faced significant enrollment declines over the past decade, resulting in structural and budgetary challenges. Demographically, the student body presents intersecting support needs, and the college's decentralized

operations require improved cross-functional collaboration to enhance our students' success. As a result of these challenges, the college's retention and graduation rates have lagged those of many peer institutions.



Photo by Allison Shelley/Complete College Photo Library

Retention for the Fall 2022 cohort was 64%, which is typical of historical averages, and six-year graduation rates peaked at an all-time high of 51.5% in May 2023. Finally, in direct opposition to our mission and vision, the college has not made progress on closing persistent 10-15% achievement gaps in retention and graduation rates among our diverse student populations.

10-15% achievement gaps in retention and graduation rates among different student populations

Sensemaking to Engagement: Prioritizing Transformative Action

In August 2023, we launched a Student Success Summit to bring together teams across Academic Affairs and Student Affairs, leading to better campuswide understanding of holistic student support. We introduced faculty and staff across the college to one another and worked on hypothetical case studies about supporting students through intersecting academic, financial, and personal challenges.

The Student Success Summit led naturally into our engagement with the Gardner Institute's Transforming the Postsecondary Experience™ program and administering the Institutional Transformation Assessment (ITA) and Readiness Willingness and Ability (RWA) survey to the campus community in Fall 2023.

Transformation Powered by the ITA

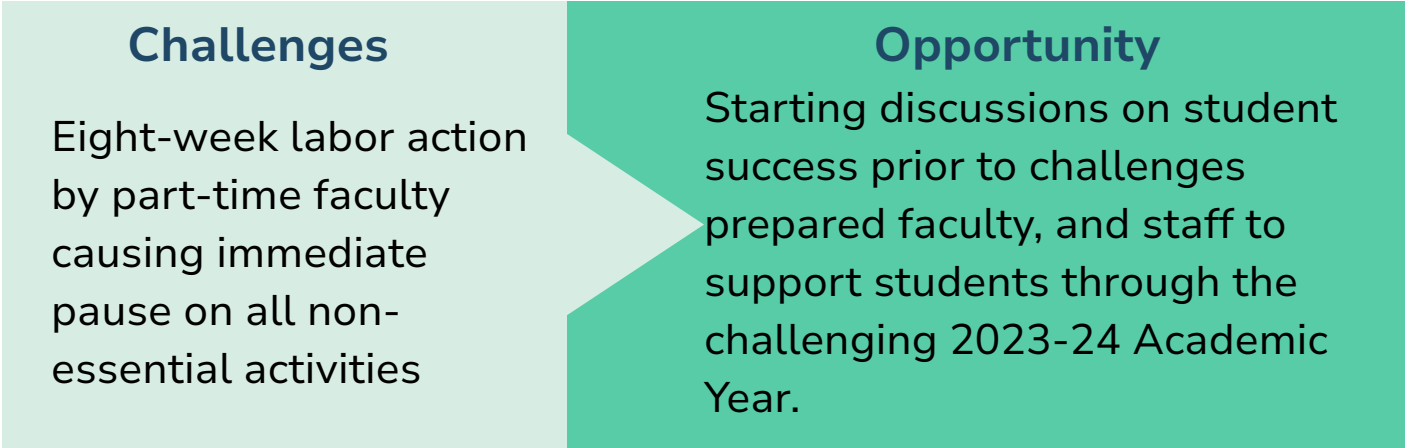
College leadership across academic affairs, business affairs, and student affairs completed the surveys as one cohort, and a large group of student success staff – encompassing college advising, student life and wellness, financial services, and academic staff and faculty – completed the surveys as an additional cohort. Initial review of the survey results indicated broad consensus that the college’s student success efforts were underdeveloped, especially given our student population’s needs.

Sensemaking was scheduled for early November but had to be delayed because, immediately after concluding the surveys, the college weathered an eight-week labor action by part-time faculty affecting about 800 course sections. All non-essential activities ceased immediately, delaying sensemaking until late February 2024 and amplifying the college’s student success challenge in unpredictable and profound ways. The Board of Trustees declared a state of adverse circumstances and approved a plan for program re-organization and reductions in force, and the sitting President resigned – all by February 2024. Fortunately, because we had at least begun discussing student success, faculty, and staff were arguably better prepared to support our students through the challenging 2023-24 Academic Year, correlating with a 1% increase in FA23 First-time, Full-time (FTFT) retention into FA24 despite the circumstances. Unfortunately, applications and new enrollments for FA24 turned sharply downward, exacerbating the challenges to come.

In February 2024, with the help of key Gardner Institute partners, the transformation team quickly revamped its plans for sensemaking in the context of the college’s current moment. Because the ITA data demonstrated broad agreement and made such a strong case for the need for change, the team was able to explicitly acknowledge that no process or area



of college operations was off limits, and everything was on the table. A large team, including the college’s Provost, CFO, VP of Student Affairs, and a group of stakeholders from across the institution’s student success community engaged in two intense days of data review and conversation. Out of this sensemaking, the team developed a multi-year service roadmap and began articulating top-level priorities for transformation with a special focus on improving the first-year experience and improving access and use of student supports to establish a sense of welcoming and belonging at the college.



Early Action and Impact:

Improving our Integrated First Year Experience

Within weeks, a Columbia College Chicago team was enrolled in the Academy on the First College Year, and a smaller team began exploring curriculum mapping through the Curricular Analytics Community. The Academy on the First College Year, team included representatives from the existing Student Success Taskforce (office of the provost, student financial services, college advising, student persistence, new student programs, and enrollment management) but focused us around a discrete, action-based approach.

“Because the ITA data demonstrated broad agreement and made such a strong case for the need for change, the team was able to explicitly acknowledge that no process or area of college operations was off limits, and everything was on the table.”

Our work in the Academy on the First College Year was galvanized by the college's immediate situation as well as our collective acknowledgment that we needed to better align our existing student supports and collaboration between Academic Affairs and Student Affairs. The Academy on the First College Year, provided guidelines for putting that cross-functional team to work in rapidly assessing our current offerings, examining the data, and piloting a new Integrated First Year Experience (IFYE). Within weeks, we committed to subtle but significant changes in our existing orientation and first-semester First-time, Full-time course curriculum that surprised all of us and from which we are still learning, all to the benefit of our students.

Our redesign of the IFYE focused on the alignment of existing resources and redesigning them to scaffold onto one another. We began with orientation, which traditionally happened in large groups of 100+ students in an event space, where they were largely “talked to” rather than “engaged-with.” We committed to breaking those events into smaller cohorts of ~20 prospective students with 2 current student leaders plus relevant staff. We then followed the smaller orientation engagements with scaffolded school-specific connections events during move-in week. This was followed by our first Convocation to be held in and around the Student Center, which previously had been held outdoors at a nearby park. The Student Center provided not only welcome relief from the humidity and heat of Chicago in late August, but it solidified the Student Center as a central hub for campus engagement. This is significant since our data shows students who visit the Student Center (as measured by OD swipes) are more likely to retain than students who don't.



Among the more extensive revisions was inserting direct reinforcement of our orientation materials into our signature first-year class, colloquially called Big Chicago, a required-course for all FTFT students that had undergone some provisional revisions emphasizing student success in Fall 2023. New to Fall 2024, we inserted three modules that aimed to orient students to Columbia as an institution and College as a new stage in learning. Those modules focused on Getting Involved (in co-curricular activities), Getting Support (for mental/physical health, academics, and finances), and Getting Registered (for Spring semester, since we register students for their first fall semester). To reinforce the supports and put a face to the offices of Student Life, the Dean of Students Office, Counseling, and Advising, we asked staff from those areas to conduct the presentations and engage the students in break-out activities.

Relatedly, our English and Creative Writing faculty had already redesigned our required intro English course into Foundations of 21st Century Writing, but we recognized the opportunity to tie this course as well into the holistic supports of the IFYE since it, too, is required of all FTFT students. Again, by reinforcing recognizable concepts and reminding students repeatedly of the supports available to them, our goal is to create a sense of a holistic first-year experience and reduce any barriers to asking for help.

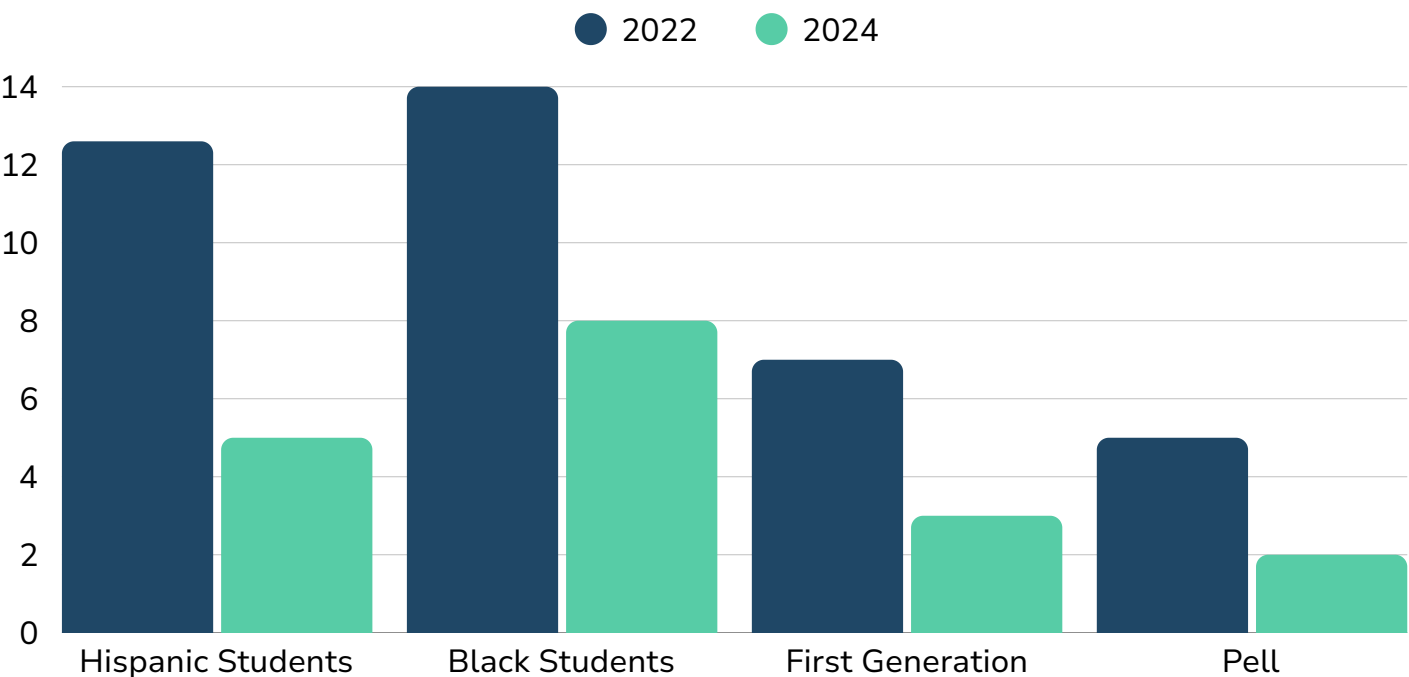
“Within weeks, we committed to subtle but significant changes in our existing orientation and first semester FTFT course curriculum that surprised all of us and from which we are still learning, all to the benefit of our students.”

We carefully monitored the impact of these changes via a series of conventional metrics like retention and DFW rates, which revealed some valuable insights. As of this writing, we are sitting at 66.3% retention PIT for FA24 FTFT, compared to 66% PIT with FA23 FTFT students, meaning that under considerable stress to our system both from internal change and external factors, we maintained stability.

And, if the persistence data was not as positive as we desired, our DFW numbers indicated a dramatic drop in achievement gaps between different populations, indicating the changes begun in FA23 and accelerated in FA24 were significantly contributing to a more consistent experience for our students.

Beyond the overall drop in DFW rates, we saw especially significant closures of achievement gaps from 2022 to 2024 between Hispanic and White students (12.6% → 5.3%), Black and White students (13.7% → 8.9%), and first generation and continuing generation students (13.1% → 6.9%).

Likewise, in ENGL 111, while the overall DFW rate hovered at 19%, we saw the closure of achievement gaps from 2022 to 2024 between First Generation and Continuing Generation students (6.7% → 3%), Pell and non-Pell students (5% → 2%), and Hispanic and White students (10% → 3.5%). This is a testament to our facilitation of more consistent student outcomes, which should help with longer-term persistence to graduation.



At the suggestion of the Gardner Institute, we also incorporated a series of informal, QR code pulse checks at the end of each of the Get Involved, Get Support, and Get Registered modules in *Big Chicago*. The surveys both gathered student feedback and asked them to reflect on what they learned in the presentations. The Pulse Checks yielded valuable insights including our students' preference for learning about co-curricular activities by posters around campus (reinforcing the value of spaces and places in student life), as well as the fact that by Week 5 and 6, when we visited them about Getting Support, they were starting to feel the stress of keeping up with college academics and they intended to visit the Academic Center for Tutoring. Another prominent insight was learning that coupled with academics, our students were most worried about their mental well-being and finances. This allowed us to tailor follow-up messages to all

students with additional links to these resources, as well as to conduct individualized follow-up to students whose open-ended responses indicated special needs, helping us to get ahead of issues via this leading indicator.



quick win

Incorporated a series of informal, QR code pulse checks which yielded valuable insights including students' preference for learning about co-curricular activities by posters around campus.

Results, Reflections, and Next Steps

Lessons Learned and a Look Ahead

What we learned from this process is very much guiding our work in AY 2025-26 and beyond, and we've identified a few key principles that may prove useful for others.



1. Begin with Data

Effective interventions begin from a clear understanding of current conditions. In our experience, we found the following data points to be valuable:

- Overall one-year retention rate trends over three to five years.
- Retention rate trends broken down by various demographic factors, including first-generation status, Pell eligibility, high school GPA, and other demographics.
- DFWI rates for multi-section, first-year courses, including section-level rates.
- Correlations between course DFWI rates and fall-spring persistence and one-year retention, again separated by a variety of demographic factors.

Equally important, we collected qualitative data from students, faculty, and staff. These data included:

- Academic alerts submitted by faculty.
- Student surveys and course evaluations.
- Interviews, focus groups, and reports involving front-line student support staff, including college advisors, student persistence staff, health and wellness staff, student organization leadership, and other key groups that engage with first-year students.

2. Establish a Student Success Governance Structure that Fosters Collaboration

Information sharing and coordination of efforts were key to the efficacy of our student success initiative. Ideally, an institution's executive leadership should formally establish a governance structure for student success and retention initiatives, inclusive of offices involved in student-facing support functions across the institution. Institutional leaders should give the governance committee a clear and direct charge outlining expectations and goals related to collaboration, investment of time and other institutional resources, and success metrics for overall student retention and any identified achievement gaps.

3. Lean in to Leading Measures and Look for Knowledge Gains Throughout Your Data

When looking at the data, we learned to not only look at lagging indicators that showed us how we did (past tense – retention, DFW), but also to look at leading indicators for how we are doing (present tense – pulse checks, for example). Leaning into leading indicators helped shift our mindset, causing us to respond more nimbly to get ahead of issues like student academic anxiety before it turns into failing grades or withdrawals. We also learned if we looked solely at what we wanted to improve (persistence and retention rates), we would have missed other insights that have the potential for longer-term gains (like our closure of achievement gaps, which we initially missed). Further, by messaging these positive gains, we increased our stakeholder buy-in because they could see the results of their efforts, creating a positive upward spiral.

4. Assess, Adapt, Iterate

Columbia College Chicago has initiated a significant college-wide effort in support of student success, and the institution's work has begun to show returns with the closure of achievement gaps and relative retention stability amidst significant changes. Much work remains, and the college's partners at the Gardner Institute reiterate that transformation takes time, commitment, and the right blend of urgency and patience. We are currently in the midst of Retention Redesign with the Gardner Institute, which is helping to shape the governance structures, lines of reporting, accountability, and strategic vision for the next phase of Columbia College Chicago. We've come to realize there is no finish line – this is the work of continuous improvement.

Authors:



Nathan Bakkum, PhD, Senior associate provost and associate professor of music

Nathan Bakkum, PhD, is senior associate provost and associate professor of music at Columbia College Chicago. In his role as senior associate provost, Bakkum serves as the senior vice president and provost's chief deputy, working closely with the academic leadership team to promote an environment of continuous improvement. He provides leadership and oversight for all academic operations, academic program development and review, and academic support services.

In his published writings and his curricular designs, Bakkum has focused on the interactive dynamics of improvising musicians, popular music historiography, and the production and circulation of musical recordings. His research has appeared in *Black Music Research Journal*, *Jazz Perspectives*, and the *Journal of Music History Pedagogy*. As a bassist, he has studied with jazz legend Richard Davis and Chicago jazz stalwart Larry Gray.

Bakkum holds a PhD in History and Theory of Music and an MA in Ethnomusicology from the University of Chicago, an MMus in Double Bass Performance from the University of Wisconsin-Madison, and a BMus in Music Education from DePaul University.

Greg Foster-Rice is Full Professor of the history of photography and Associate Provost for Student Success Initiatives at Columbia College Chicago. Most recently, he curated *The Many Hats of Ralph Arnold: Art, Identity & Politics*, which opened at the Museum of Contemporary Photography (2018) and traveled to DePauw University in Fall 2022. For that exhibition, Foster-Rice edited and co-authored a scholarly catalogue of essays surveying Arnold's extensive career. Previously, he co-curated *The City Lost and Found: Capturing New York, Chicago, and Los Angeles, 1960-1980* at the Art Institute of Chicago and Princeton University Art Museum and co-authored that exhibition's catalogue which received the Philip Johnson Award from the Society of Architectural Historians in 2015. He has a BA from Rice University and a PhD in Art History from Northwestern University.

Greg Foster-Rice, Full Professor of the History of Photography and Associate Provost for Student Success Initiatives





Momentum Through Alignment:

Mary Baldwin University's Path to Institutional Transformation

BY: PAUL MENZER

MB MARY BALDWIN
UNIVERSITY

Executive Summary

Mary Baldwin University (MBU) embarked on two transformative initiatives in 2024: a strategic planning process (“Elevate MBU”) and a partnership with the Gardner Institute’s Transforming the Postsecondary Experience™. Though distinct, these initiatives advanced in tandem, each propelling the other forward. The combined focus on institutional planning and first-year student success produced momentum, broadened engagement, and embedded the Gardner Institute’s work directly into MBU’s strategic framework. This alignment has primed the institution for more efficient implementation, grounded in data, collaboration, and shared purpose.



Why Transform: Institutional Context and Challenges

Mary Baldwin is a small, complex institution with three connected but distinct sectors: online, a graduate College of Health Sciences, and a traditional undergraduate residential campus. The undergraduate sector, home to the Gardner Institute's work, faces the steepest challenges in recruitment, retention, and graduation. Current rates — 63% first-to-second-year retention and 50% completion — fall short of our mission to prepare students for lives of purpose and professional success.

Small size means limited staffing capacity; faculty and staff wear multiple hats daily. Yet, despite resource constraints, urgency demanded immediate action. We could not wait for perfect conditions. Change was driven by both altruism — genuine commitment to student success — and self-interest, including the professional growth opportunities inherent in the Gardner Institute's partnership. This dual motivation enabled faculty and staff to embrace simultaneous large-scale efforts.

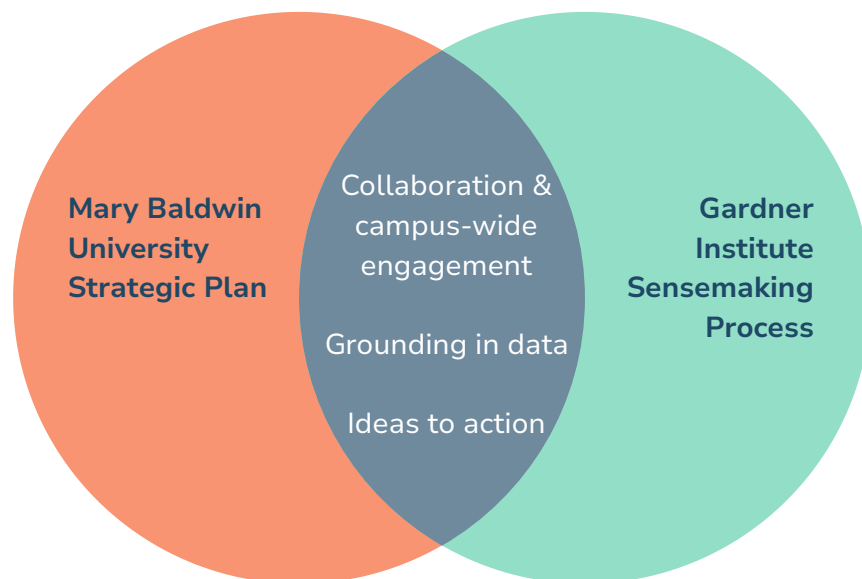
“We could not wait for perfect conditions. Change was driven by both altruism — genuine commitment to student success — and self-interest, including the professional growth opportunities inherent in the Gardner Institute's partnership.”

Sensemaking to Engagement: Prioritizing Transformative Action

Our strategic plan and Gardner Institute partnership developed in a “paceline” formation, each taking turns in the lead and drafting off the momentum of the other. Strategic planning primed the campus for the Gardner Institute’s Institutional Transformation Assessment (ITA) and sensemaking process by fostering a collaborative disposition and readiness to engage.

Both initiatives shared three core elements:

1. **Collaboration and campus-wide engagement** – Broad participation connected disparate areas and built shared ownership.
2. **Grounding in data** – Use of both qualitative and quantitative evidence to inform decisions.
3. **Movement from ideas to action** – Clear progression from concept to action planning to implementation.



Sensemaking sessions translated broad strategic goals into concrete ideas for improving student success. The Gardner Institute work now appears explicitly in the strategic plan, signaling Board support and institutional commitment. The data gathered through the Gardner Institute provides baseline benchmarks aligned with the five-year plan.

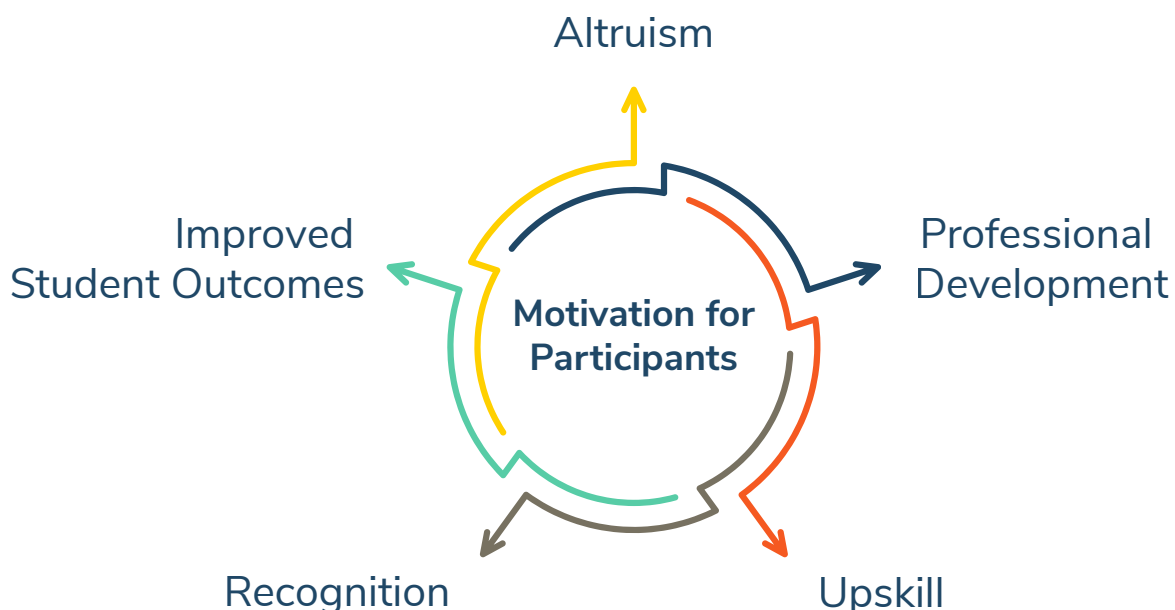
Results, Reflections, and Next Steps

Lessons Learned and a Look Ahead

Our experience has underscored that alignment between initiatives can significantly accelerate progress. Running two major projects in tandem — the strategic planning process and the Gardner Institute partnership — did not dilute our efforts; rather, it amplified them. Because both shared a central goal of improving student success, each initiative reinforced the other's momentum, creating efficiencies and deeper institutional engagement than either could have achieved alone.

Equally important, we found that culture matters as much as process. The collaborative habits cultivated during strategic planning carried over directly into our Gardner Institute work, fostering a readiness to engage and a willingness to connect across departmental boundaries. This cultural shift increased buy-in and smoothed the path for implementation.

We also learned that the motivations driving participation are multi-faceted. Appeals to altruism — the shared desire to see our students thrive — resonated deeply across the institution. At the same time, appeals to self-interest proved equally effective, whether tied to professional development, the opportunity to upskill, or the recognition that stronger student outcomes sustain the institution's future. Together, these motivations overcame the constraints of limited staffing and time.



Finally, we recognized the indispensable role of data in building credibility and guiding action. Quantitative metrics provided clear benchmarks, while qualitative feedback illuminated the lived experiences behind the numbers. Together, they offered a balanced, evidence-based foundation for decision-making, enabling us to set realistic goals and demonstrate accountability to both internal and external stakeholders.

Other institutions might see in our experience the value of weaving large-scale initiatives together rather than sequencing them. This integrated approach not only sustains momentum but also embeds reforms more deeply in the institution's culture, ensuring they take root and flourish over time.



Conclusion

John Ruskin observed that for people to be happy at work, they must be fit for it, not overburdened by it, and have a sense of success in it. Transformation initiatives — whether strategic planning or student success initiatives — offer a chance to operationalize this wisdom at the institutional level. For MBU, coupling the Gardner Institute's work with strategic planning has created a unified, forward-moving force toward improving student outcomes and fulfilling our mission.



Coupling the Gardner Institute's work with strategic planning has created a unified, forward-moving force toward improving student outcomes and fulfilling our mission.

Author:

Paul Menzer is provost of Mary Baldwin University and professor of Shakespeare and Performance. He is the editor of *Inside Shakespeare: Essays on the Blackfriars Stage* (2006), *Romeo and Juliet* (2017), and *Doctor Faustus* (2018). He is author of *The Hamlets: Cues, Q's, and Remembered Texts* (2008), *Anecdotal Shakespeare: a New Performance History* (2015), *Shakespeare in the Theatre: The American Shakespeare Center* (2016) and of dozens of articles, essays, reviews, and chapters on theatre history, textual criticism, and performance studies. He is past President of the Marlowe Society of America and the founding co-editor of *The Hare*, an online journal of brief essays and untimely reviews. He also serves on the Editorial Board of *Shakespeare Quarterly*. He is also a practicing playwright and his plays *Anonymous*, *The Brats of Clarence*, *Shakespeare on Ice*, *Invisible Inc.*, and *Robin Hood is Dead* have appeared on the Blackfriars stage and elsewhere. He has two forthcoming books, *The Brief Life of William Shakespeare* and *Shakespeare's Enemies*.



Paul Menzer, Provost

Institution	Institution Type	Transformation Highlights	Special Designations
California State University, San Bernardino (CSUSB)	Public 4-Year	Curricular analytics; faculty development; strategic alignment; data dashboard integration	Broad Access; HSI; Regional Comprehensive
Columbia College Chicago	Private 4-Year	Integrated First-Year Experience; cross-functional collaboration; rapid program implementation	Broad Access; MSI; HSI; Arts Focused
Fairmont State University	Public 4-Year	Title III grant-backed planning; stakeholder engagement; coordinated leadership structure	Broad Access; Regional Comprehensive; Title III Grant Institution
Louisiana State University Shreveport (LSUS)	Public 4-Year	Redesign of advising model; embedded support services; curriculum mapping; data-informed decision-making	Broad Access, Regional Comprehensive
Mary Baldwin University	Private 4-Year	Strategic plan integrated with transformation; strong faculty/staff engagement; capacity challenges	Broad Access; Private Liberal Arts
Queensborough Community College (QCC)	Public 2-Year	Curricular redesign; data literacy training; broad-based faculty engagement; gen-ed course improvements	Open Access; HSI; MSI; Community College

* “Broad access” in this context denotes that >75% of applicants are admitted to the institution.

Conclusion

Navigating Change, Together: Institutional Transformation as a Strategic Imperative Transformation as an Engine of Institutional Vitality

The national educational landscape constantly changes and evolves, but today, it seems as clear as ever that institutional transformation and adaptability focused on supporting student success is more urgent and vital than before. The pressures facing institutions are many: declining enrollment, financial constraints, workforce expectations, and the evolving profile of the modern student. Lasting changes in student success outcomes require institutions to look within, not just beyond, to find what works and is sustainable. The six case studies presented in this volume offer insight into looking within, illustrating that transformation, when intentional and well-structured, serves as an engine of renewal and long-term vitality.

The institutions in this case study anthology range from regional comprehensives like Louisiana State University Shreveport (LSUS) to urban colleges such as Columbia College Chicago. Each has embraced the difficult work of examining assumptions, realigning priorities, and restructuring systems. One thing that all these institutions have in common is that their transformation efforts emerged from a sense of necessity and a shared determination to better serve students, support faculty and staff, and improve institutional outcomes.

The stories are not about overnight success, but about deliberate and often incremental improvement. They show what happens when institutions prioritize coherence, collaboration, and measurable progress. More than anything, they affirm that meaningful transformation requires commitment at all levels of an organization—leadership, faculty, staff, and students alike.

Three Strategic Themes for Institutional Transformation

Despite the uniqueness of each case, three core themes emerge across the institutions studied. These strategic pillars serve as a roadmap for others seeking to engage in similar work.

Data as a Catalyst for Focused Action

Across all cases, data-informed decision-making and multiple measures played a central role in driving transformation. Institutions began by assessing internal conditions through tools like the Institutional Transformation Assessment

(ITA), the Readiness, Willingness, and Ability survey (RWA), institutional data, and focus group discussions. The results of these perception assessments and internal data drive a facilitated stakeholder conversation, sensemaking and prioritization. By engaging in the wider sensemaking process, they derived a better sense of the state of current systems and the perspectives of a wide group of faculty, staff, and, in many cases, students. This process was more than technical; it was cultural. It invited campus stakeholders to move beyond anecdotes and assumptions and ground conversations in evidence that informed action plans.

At LSUS, this meant uncovering gaps in advising, curriculum design, and communication, then prioritizing solutions such as improved course sequencing and a new centralized advising model. At Queensborough Community College (QCC), curricular analytics revealed critical chokepoints in student progression—prompting widespread departmental engagement in redesigning academic programs. California State University, San Bernardino (CSUSB), while faced with capacity constraints, embedded data directly into its ongoing strategic planning process, using the process it to drive investment in advising infrastructure, faculty development, and academic success tools. At all three institutions, partnerships with organizations like Complete College America, Achieving the Dream, and Growing Inland Achievement have helped to strengthen transformation

efforts and increase access to institutional resources.

Collaboration Across Units as a Lever for Change

Another shared feature of effective transformation is the breakdown of operational silos. Institutions that made the rapid progress created structures for cross-functional collaboration and empowered multidisciplinary teams to lead implementation.

Columbia College Chicago exemplified this approach during a year of institutional volatility. Faced with a faculty labor strike and executive leadership change, the College still managed to overhaul its first-year experience program. Staff from enrollment, advising, academic affairs, and student services worked in sync and made the redesign possible despite the significant faculty and leadership changes. Their revised orientation and first-year seminar were not standalone efforts, but part of a cohesive structure designed to ensure smoother transitions for new students.

At Mary Baldwin University, faculty and staff layered transformation efforts into strategic planning from the outset. Leaders used both institutional urgency and professional development incentives to engage faculty and staff across departments, ensuring a wide base of support for the work.

Fairmont State University, supported by a Title III grant, created a Student Success Support Team with broad representation and regular lines of communication to the president and

provost. This group served as a hub for coordinating data analysis, implementation planning, and alignment with external partners.

Institutional Alignment Counteracts Initiative Fatigue

A third theme evident in all six institutions is the shift from disjointed initiatives to integrated, campuswide alignment. Rather than layering new programs on top of existing ones, successful campuses re-examined how core structures—such as advising, gateway course delivery, and academic planning—could better serve their primary mission.

At LSUS, this took the form of embedding student support within the academic experience itself—locating math faculty office hours and advising services inside the student success center, for instance. Such changes made it easier for students to access help without adding to their time burden.

QCC, facing high DFWI (Grades of D, F, Withdraw, or Incomplete) rates in general education courses, used course-level data to drive discussions about curriculum design and scheduling patterns, anchoring those conversations in long-term planning and program review cycles.

Even institutions in the nascent stages of the transformation process, like Fairmont State, committed to aligning external grant expectations with internal decision-making structures, ensuring sustainability beyond the life of the grant.

The Work Ahead: Coming Together to Find a Path Forward

While the progress documented in these case studies is significant, none of the institutions considers their work complete. In fact, the consistent message across all six institutions is that transformation is a process, not a product, and that it will take time and commitment to continuous improvement to ensure that more students succeed as the educational landscape continues to shift. The work of student success thrives when stakeholders come together within institutions and across them to focus on specific, systemic issues, and then take action.

Several institutions, such as Columbia and CSUSB, used early results as justification to expand pilot programs or revisit institutional policies. At Mary Baldwin, the new strategic plan launched alongside the Gardner transformation work created momentum for shared benchmarks and longer-term institutional learning. These cases underscore a key, consistent indicator: transformation must be cyclical, and making improvement processes culturally normative is part of the transformation story. Keeping student needs in focus depends on feedback loops, organizational memory, and a commitment to sustainable ways of working.

So, to sustain this effort, institutions will need to maintain visibility and include the community along the way. This means investing in leadership and professional development, documenting

and sharing progress, and maintaining transparency with campus stakeholders. It also means resisting the allure of one-off solutions and focusing instead on redesigning the core systems that shape student experience and institutional capacity.

Strengthening the Institutional Core

Each of the institutions sharing a story of transformation here made difficult choices. They chose to confront complexity, bring people together to talk about their unique challenges, and advance their missions in innovative ways rather than retreat to familiar routines. That spirit of proactive engagement is at the heart of institutional transformation.

As the postsecondary education sector continues to navigate demographic, technological, and financial change, these case studies offer practical insight—not just into what to do, but into how to do it. Our hope is that the practitioner-focused activities at the end of each chapter are useful, and that readers will reach out to the authors and the Gardner Institute as you engage in transformative work at your institutions. This work thrives when people work in community and share learning for the benefit of all students. These stories, and your future stories, exemplify that transformation is not something institutions declare, rather it is something they build through a strategic set of coordinated decisions and actions over time.

This movement to transform postsecondary education is still in early

stages. The initiatives, structures, and strategies described here will evolve. They will face setbacks. But they have already begun to reshape what is possible individually and collectively for higher education.

To those reading these case studies: this is an invitation. Engage with your data. Examine your systems. Invite representative voices to the table. And begin, or continue, the work of strengthening your institution, not by simply copying what others have done, but by adapting lessons informed by your own context.

The transformation journey is not about perfection. It is about progress.



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Thank you

The Gardner Institute extends sincere appreciation to the authors of the six case studies featured in this publication.

Their insights, experiences, and commitment to improving student learning and success made this collection possible. Each case study reflects the thoughtful work and innovation taking place across institutions dedicated to advancing higher education.

About the John N. Gardner Institute for Excellence in Higher Education

The John N. Gardner Institute for Excellence in Higher Education is a non-profit organization dedicated to partnering with colleges, universities, philanthropic organizations, educators, and other entities to increase institutional responsibility for improving outcomes associated with teaching, learning, retention, and completion.

The Institute supports postsecondary education's efforts to ensure that every learner earns a credential that leads to a meaningful career and a highly fulfilling life. Through its work, the Institute advances higher education's broader mission of expanding opportunity and success for all students.

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