MSU INVESTMENT PROPOSAL FOR INSTITUTIONAL PRIORITIES

PROPOSAL OVERVIEW

Title	Student Relational Management System (BRM) and CourseSignals	**Request Date**	December 15, 2011
Departments	Admissions, Office of Student Success	**Email**	rrussell@montana.edu cbeck@montana.edu
Requestors	Ronda Russell, Carina Beck	**Phone**	5541/5483

STRATEGIC ALIGNMENT

Core Themes and Objectives (check all that apply)

Educate Students

☒ Our graduates will have achieved mastery in their major disciplines

☒ Our graduates will become active citizens and leaders

☒ Our graduates will have a multicultural and global perspective

☒ Our graduates will understand the ways that knowledge & art are created and applied in a variety of disciplines

☒ Our graduates are prepared for careers in their field

☒ We will provide increased access to our educational programs

☒ Communities and external stake holders benefit from broadly defined education partnerships with MSU

Create Knowledge and Art

☒ Students, faculty, and staff will create knowledge and art that is communicated widely

Serve Communities

☒ We help meet a fundamental need of the citizens of Montana by providing degree programs for our students

☒ We help meet the educational needs of the citizens of Montana by providing a wide range of educational opportunities to a variety of students

☒ Our students, faculty, staff, and administrators reach out to engage and serve communities

☒ Our students, faculty, staff, and administrator reach in to build the university community

Integrate Learning, Discovery, and Engagement

☒ Each graduate will have had experiences that integrate learning, discovery and engagement

☒ Outreach activities will educate students and address the needs of the communities we serve

☒ Students, faculty, and staff will create knowledge and art that addresses societal needs

☒ MSU is a community that will be characterized by synergy within and across disciplines, roles and functions.

Stewardship

☒ The public trusts the institution to operate openly and use resources wisely

☒ The faculty and staff are well-qualified and supported

☒ MSU will support Native American students, programs, and communities

☒ MSU will be an inclusive community, supporting and encouraging diversity

☒ Our publicly provided resources are used efficiently and effectively

☐ Natural resources are used efficiently and sustainably

☐ MSU nurtures a culture of resource conservation and ecological literacy among students, faculty and staff

☐ Our physical infrastructure (e.g., building, equipment, open spaces) will be well-maintained and useful

INSITUTIONAL BENEFIT	
Campuses	☒ Bozeman ☒ Billings ☒ Havre ☒ Great Falls ☐ FSTS ☐ Extension ☐ MAES
Cross Depts	Please List: Benefits all campus offices and departments.

TIMEFRAME	
Proposed Dates	Start: Spring 2012 End: Fall 2013

COST AND REQUIREMENTS						
Funding Type	One-Time ($)	Multi-Year ($)			Base ($)	FTE
		Year 1	Year 2	Year 3		
Personnel (*w/benefits***)**					180,000	3.0
Materials & Supplies						
Travel						
Contracted Services					138,000	
Capital	700,000					
Other Operations					32,000	
TOTAL	700,000				350,000	

Please comment, if necessary, regarding cost and requirements.	This project is necessary on all 4 campuses for both recruitment and retention purposes. The one-time capital costs of $700,000 are not part of this request but are shown here for information purposes. It is our understanding that these costs could be funded through ITC reserves. The 3 FTE necessary for this project reflect the need for an additional ITC resource with 4 campus DBA responsibilities, a technical resource in the Office of Student Success with 4 campus responsibilities and a functional resource in the Office of Student Success. The Contracted services estimate reflects annual maintenance fees for the BRM and annual subscription costs for Course Signals. The other operations expense reflects training, travel and other costs associated with optimal use of the software. This proposal fits well with the mission of OPEN MSU, since it creates new and better ways of "doing business" to improve communication and create efficiencies with processes that already exist allowing faculty and staff to better and more frequently interact with students. Further, if this project is funded, we fully expect a significant return on investment, since the product is designed to better recruit and retain students in an efficient and predictive manner thus improving MSU's bottom line.

What is BRM?

Banner Relationship Management provides the core constituent relationship management (CRM) capabilities MSU needs to strengthen and enrich connections with prospective and current students BRM is a powerful second generation Banner product allowing the university to better use the information stored in Banner to: 1) communicate with students based upon "profiles" established by the user (i.e. major, year in school, in-state male with a GPA below 2.0, etc.); 2) make and share comments with other campus personnel after student meetings with faculty or advisors (akin to Advisor Dashboard); 3) track and determine if communication received by the student was "opened" or "viewed" and retool communication campaigns if necessary; 4) develop "profiles" to reach out to students who might be most at risk for departure; and 5) when combined with the Course Signals Product, allow the university to identify and communicate with students who are most at risk for departure based upon grades, attendance or participation in the class from the first week of school.

Banner Relationship Management's capabilities cross departmental boundaries and are available through each phase of the student lifecycle, ultimately improving the efficiency of outreach efforts to better recruit, engage, retain, and graduate students. Consolidated Banner reports will provide consistency across all four campuses, resulting in uniform population definitions and insight into progress towards recruitment and retention goals. This holistic approach means MSU will be more effective at targeting and enrolling prospects and engaging and retaining our current students through graduation.

Banner Relationship Management will help MSU:

- Competitively identify, recruit, and commit prospective students.
- Design more effective strategies, programs, and communication campaigns to improve the current student experience through better communication and engagement.
- Identify and engage at-risk or excelling students with robust early alert tools to provide information to improve the campus experience for students "on both ends of the engagement continuum"
- Improve retention results and graduation outcomes.
- Maintain a targeted communication recruitment and retention strategy to be on par with many other institutions who currently use a CRM, including the University of Montana.

Why does MSU need BRM for prospective students/Admissions?

Banner Relationship Management can help MSU Admissions programs by:

- Aligning our recruiting strategy to our enrollment goals
- Helping recruiters focus efforts on building relationships with the most qualified prospects and applicants
- Designing more effective/efficient strategies, programs, and campaigns to recruit and enroll "targeted" students at MSU

MSU Admissions will be able to segment various types of prospects and applicants for immediate follow-up and take a recruitment approach which is highly targeted to those students desired most for a variety of reasons (example— interested in an undersubscribed program, high test scores, Native American student, etc.). This will enable us to move MSU's admissions program in a direction which is much more proactive and personalized. Staff will be able to better connect with individuals through more timely and personalized interactions and capture those relationship histories in Banner—something which is not happening currently.

In addition to the ability to create sophisticated, sequential and relevant communication plans, the software will enable MSU to have much more robust Banner reporting functionality in the student areas. The functionality is desperately needed. As an example, Admissions prospect, application and enrollee data archives are retained in paper file boxes today. Automated, consolidated electronic reports will provide consistency across campus and the MSU system, resulting in uniform population definitions and insight into progress towards goals.

The Office of Admissions currently utilizes a 'home grown' online checklist which applicants are directed to during the recruitment phase to track various missing materials, etc. While this checklist is better than having nothing at all, BRM would enable MSU to make it a great deal more comprehensive, intuitive and user friendly—all things which

applicants are expecting in today's competitive higher education marketplace.   Further, this system will allow the institution to quickly adapt and change checklist criteria without "technical hard coding" which gives MSU the opportunity to be more flexible with changes.

The current Admissions operation is robust. However technical aspects of the program are "tied together" with limited resources and managed by individuals with narrow scopes/areas of responsibility. Admissions' technical solutions utilize various pieces of software and technical expertise which are limited and often not interrelated. This puts MSU and our recruitment/admissions operations in a position which is far too vulnerable. Banner BRM would be a comprehensive solution which will be intuitive and provide a user friendly interface to Banner. This solution will go far in helping us solve a wide variety of technical challenges, develop more people with expertise in critical technical areas and enable us to continually use technology to better meet business challenges and the needs of our constituent groups.

Why does MSU need BRM and CourseSignals for Student Success/Retention?

As previously explained, BRM is a flexible tool designed to follow the lifecycle of the student and enhance the experience by developing communication and engagement plans based upon student profile. Because of this flexibility, the information developed during the recruitment phase can be used and built upon to improve student retention by strategically targeting communication and resources to those who are at most risk for departure.

CourseSignals is a product that dynamically "feeds" grades from a learning management system (i.e. D2L), into a central repository (BRM/Banner), permitting the institution to have real-time actionable information on student grades and attendance. This allows additional risk profiling to determine those most at risk and begin interventions with students before mid-semester with course attendance, quiz grades and other measures imputed by the faculty member.

A major feature of the BRM system and CourseSignals allows faculty and staff to view and use real-time "dynamic" Banner and D2L data to identify, target communicate and record student interventions. Currently no tool exists at MSU to aid and improve student retention and graduation rates in a broad manner.

Together, BRM and CourseSignals can help improve MSU retention and graduation rates by:

- Identifying at-risk students early enough to make a difference (during the pre-entry and entry phase of the student life-cycle). Without BRM, data in Banner is difficult to "mine" at an individual office level without the support of highly qualified individuals who understand relational database structures. With BRM, it is possible to extract real-time student data identifying those who are most at risk based upon their incoming student profile (ACT, HS GPA, major, geography, etc).
- Enabling advisors to view alerts associated with any individual student, student population, or cohort and take proactive action to assist the student and record the interaction to build meaningful relationships.
- Maintaining consistent, personalized and regular communication with current students using a variety of channels (traditional methods, web, social media, texting, etc.) to promote student engagement.
- Sending targeted messages to students based upon dynamic "real-time" risk profiles.   Profiling students based upon incoming (ACT score, HS GPA, first generation, etc.) and environmental variables (courses registered, number of credits registered, outstanding account balance, etc.).
- Learning what messages are viewed, and more importantly, where students take action on messages received as determined by system analytics.
- Using student/university interaction data (class attendance, bill payment, library fines, ChampChange engagement, etc.) to assess and manage risk.
- Providing real-time grade and class attendance data recorded in D2L and CourseSignals to identify and take action with students most at risk.
- Maintaining a central repository of information for advisors, faculty and other staff members to provide constant information and service to support the student in meeting their educational objectives. While this repository is akin to Advisor Dashboard it is more powerful, because all communication, interaction and advisor notes are found in one central location.
- Using predicative modeling information to identify, target, communicate and follow-up with students who are at most risk for departure.

Students enrolling at MSU today do so for many reasons—and with many goals. No matter how our students define success, MSU needs a way to personally engage and help them achieve those goals. As the institution reflects on it's strategy to provide access and support to retain and graduate students, a tool such as BRM/CourseSignals is essential.

Alerts can be keyed to poor academic performance in a class, low GPAs, or failure to maintain an appropriate course load to maintain financial aid eligibility. They can also identify students who are eligible to graduate but have not yet applied or to encourage students with outstanding academic accomplishments to apply for special scholarships or grants. Faculty can also provide feedback about students through an intuitive web interface. By tying this information into the early alert system, MSU can more quickly identify students with poor attendance, students who have not taken advantage scholarship opportunities, or students who are struggling with course material.

Banner Student Retention Performance, an application within BRM, provides scorecards with key performance indicators, role-based configurable dashboards, delivered trend and summary reports as well as ad-hoc reporting capabilities specific to analyzing student progress and analyzing student engagement.

PROPOSAL SCOPE
Describe the broader impacts and benefits of this proposal

What else can BRM/CourseSignals do for MSU?

BRM provides a robust dashboard functionality which can be individualized for various administrators (including President Waded Cruzado) which would show the latest admissions statistics, retention figures, student demographics, etc. and any other data which is collected in Banner which may be of interest. All Banner data will be much more readily accessible to staff. This should cut down on staff time (across campus) spent searching for specific pieces of information as well as calls/emails for students with questions. Automation of many processes (which are currently manual in many offices) will enable staff to keep pace with growing enrollments and spend more time on high-touch relationship building tactics with prospective and current students. With Banner Relationship Management, all of prospective and current student communications automatically become part of the students' Banner interaction history, providing a more complete context for staff who work directly with students. Below are limited examples of how BRM could aid business processes and student engagement at MSU:

Academic Advising -- Advisors can view alerts associated with any individual student, student population, or cohort. Because Banner Relationship Management can combine the alert view with other associated student information, advisors can use information developed in DegreeWorks as a basis for identification and communication in BRM when working with their advisees.

Career Services - MSU students can be better targeted to be informed of job and internship opportunities based upon major. In addition, students who have changed majors several times can be identified to offer career-coaching services (since change of major often relates to not having a clear career direction).

Dean of Students—Staff will have easy accessibility to current student data including at risk indicators, grades, alerts, etc., which would provide valuable context to assisting students and identifying their needs

Degree Works - BRM and CourseSignals are the perfect accompaniment to DegreeWorks since they allow information from DegreeWorks to be operationalized into communication campaigns, advisor notes, registration notifications, graduation information, etc.

Extended University-- Online advisors will be aided by this tool by being able to develop profiles and communication plans for students who might be most interested in Extended University options.

Financial Aid—BRM will be helpful when extracting data for scholarship criteria/awarding and for communicating with both current and prospective students. Banner alerts can be keyed to students failing to maintain an appropriate course load to retain financial aid or to encourage students with outstanding academic accomplishments to apply for special scholarships or grants.

Graduate School—The BRM solution will allow MSU to have better communication and reporting functionality for graduate prospects, applicants and enrollees.

ITC—MSU currently uses Microsoft Access for many reporting function. ITC has advised users to move away from this technology for years. BRM will enable MSU to extract data from Banner in a much more intuitive interface. The benefits of having the product integrated to Banner should be very efficient for the ITC staff. BRM should provide consistent architecture from a vendor we already know and help us meet many technical needs on campus.   In addition, the BRM will assist with streamlining the current role-out of new technologies including improved student email communication and google-apps.

Office of Planning and Analysis—Banner warehouse and reporting functionality will be enhanced with BRM.

Office of Student Success - The Office of Student Success will have a better way to reach out and coordinate interventions with students from various risk profiles (those who may have low academic potential to those who are underutilizing services, resources to advance their education). In addition to being highly useful for the entire campus community, BRM/CourseSignals provides the necessary technological infrastructure to develop a "cutting edge" retention program. Communication plans, interventions, early alert lists, student engagement, success analytics (and much more) will all be enhanced through the procurement of this system.

Provost's Office/Academic Departments—BRM will allow departments access to early warning/alerts regarding current students who may be at risk for dropping out.   BRM will enable admissions to improve departmental specific recruitment and targeted messaging for academic programs (perhaps those programs which are undersubscribed). BRM will provide a comprehensive view of every student that crosses departmental boundaries. This should help break down ineffective silos and improve the efficiency of outreach efforts to better recruit, engage, retain, and cultivate constituents. Faculty will be able to provide feedback about students through an intuitive web interface. By tying information into the early alert system, MSU can more quickly identify students with poor attendance, students who have not taken advantage of office hours, or students who are struggling with course material.

Registrar's Office—BRM will allow for easier reporting on current students and should allow for better, more reliable communication with current students. Consolidated reports provide consistency across campus, resulting in uniform population definitions and insight into progress towards a wide variety of goals.   One powerful example of how the Registrar's Office could use the BRM is to set up alerts to identify students who are eligible to graduate but have not yet applied.

University Business Office-- Alerts could include reminding current students to pay bills, take care of various holds, etc. Accounts Receivable staff would know whether a communication was received and viewed and make appropriate adjustments in communication plan where necessary.

Other MSU Campuses

The BRM solution will be implemented at MSU in Bozeman and expanded to the MSU system when programming staff is able to expand the reach of the functionality. All MSU campuses all have a need for this type of Relational Banner Database functionality for interactions with prospective and current students. Once this solution is implemented on all of the MSU campuses, we will be able to obtain consistent, detailed reports on applicants and enrollees and current students across all of the MSU campuses.

Maintaining Our Competitive Edge
Several institutions including the University of Montana have recently installed a CRM product to improve their recruitment, retention and graduation outcomes. Because our competitors will be able to market, respond, intervene and support students in a more personalized manner it is important we maintain our competitive edge, as students, parents, faculty and staff will develop expectations of this form of technical infrastructure within the institution.

ADDITIONAL INFORMATION

Implementation Plan *(Please describe with timelines)*

Once contracts are signed, it is expected to take one-year to implement and train key campus personnel to use the system. Ideally, if the product is purchased in the next few months, it would will be fully functional by Spring 2013. It is not unreasonable however, that some features of the BRM could be partially usable by the fall months of 2012 (where we are recruiting Fall 2013 students) and working on retention initiatives for new students who enroll in the Fall of 2012.

This is a complicated and robust system, and a "new way" for the university to conduct "business" with students. To that end, it will take over a year to fully optimize all the robust functionality available for a variety of user groups (including all four campuses).
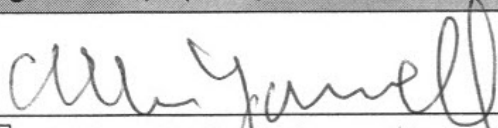
Assessment Plan *(Please describe with indicators)*

BRM and CourseSignals provide two levels of assessment opportunities for the institution: 1) allow MSU to gather data/intelligence to assess programs, services, course outcomes, etc. which impact student persistence and graduation rates. Examples of assessment include course pass rate, student class attendance, retention rate by specific student profile, re-enrollment rates, etc. This system is developed to allow a non-technical end user to see 'real time" data to make operational and strategic decisions to promote student success ultimately improving recruitment, retention and graduation outcomes; 2) MSU will also be able to assess the efficacy of the product and its use through analyzing the use and adoption of the BRM and CourseSignals – ultimately leading to improved enrollment, retention and graduation rates based upon specific strategic goals.

If assessed objectives are not met in the timeframe outlined, what is the plan to sunset this proposal?

Purchasing this system will embed the product within the institutional IT infrastructure. Once implemented, the likelihood of extracting the BRM from the university system is limited since it has the same adoption and utility as a telephone or internet. MSU is approaching a "tipping point" were we can't conduct business without a BRM simply because our competition (other universities) and the expectation of students, parents, legislators and regents require we actively and intelligently anticipate risk, communicate, support, and provide services to students who are most likely not to persist or graduate for a variety of reasons.

SIGNATURES

Department Head *(please print)*	Signature *(required)*	Date

Dept Head Priority *(please circle one)*:   Very High   High   Medium   Low   Very Low

Dean/Director *(please print)*	Signature *(required)*	Date
Ronda Russell Carina Beck	*Ronda Russell*	12/30/2011

Dean/Director Priority *(please circle one)*:   ⟨Very High⟩   High   Medium   Low   Very Low

Executive/VP *(please print)*	Signatures *(required)*	Date
Allen Yarnell	*Allen Yarnell*	1/19/2012

Executive/VP Priority *(please circle one)*:   ⟨Very High⟩   High   Medium   Low   Very Low