Retention Management System (RMS)

Coordinators Guide

Updated 2024

Contents

Introduction

Welcome to the Retention Management System (RMS)

You're now a part of a group of dedicated RMS professionals who are helping their campuses identify and respond to the motivational strengths and needs of their students. This community of educators uses the RMS to inform both the individual and programmatic interventions for students making the initial transition to college and as they progress through their first and second years of enrollment.

This guide draws heavily upon the experiences of those RMS professionals whose institutions have enjoyed success with this program. We're confident you will benefit from their insights as you assume your role as your institution's RMS representative. Additional information and resources are available to you within your RMS Resource Library.

As you work through the implementation of the Retention Management System for your college or university, contact [RNL's retention solutions team] at any point you have a question.

What is the Retention Management System?

The Retention Management System (RMS) refers to a combination of analytics, assessment tools and a data dashboard that are designed specifically to support increased completion rates through earlier, more focused student interventions. The RMS provides a wealth of data to make interventions more meaningful, more focused, and more successful. Campuses may choose to use one or a combination of the System offerings.

The RMS provides critical information to promote student success, at the time you need it.

You'll understand the strengths and challenges of each student, as well as their levels of receptivity. With this information you will be able to target your outreach efforts and resources more strategically. More specifically, this proactive approach to comprehensive student retention planning is designed to enable institutions to:

- Assess students' needs and strengths
- Identify students who may be at risk of leaving college
- Recognize students' motivational patterns, such as receptivity to assistance
- Use information to implement successful referrals and intervention programs
- Help advisors and other educators to have effective and rewarding contacts with students

The five primary components of the Retention Management System are intended to inform a broad range of student programs, services, and interventions.

1. College Student Inventory™—Prioritize your interventions more efficiently by assessing the strengths and challenges of each student.
2. Mid-Year Student Assessment™—Compare the strengths and challenges of your students at the mid-point of their first year, and adjust your interventions accordingly with this follow-up survey.
3. The Second-Year Student Assessment™—Extend and strengthen your interventions beyond the first year using this survey for second-year students.
4. Retention Data Center™—Manage and analyze all of your student success data more strategically through this comprehensive online portal.

5. Trainings—Understand how to interpret your results and use the data to shape your retention strategies.

The College Student Inventory (CSI)™

Background

The College Student Inventory is the foundation of the RMS and was designed especially for incoming first-year students. In 1971, the author of the CSI, Michael L. Stratil, Ph.D., initiated his research in the area of academic and social motivation with the goals of:

- Creating a coherent framework for understanding human motivation in general;
- Identifying the specific motivational variables that are most closely related to persistence and academic success in college; and
- Developing a reliable and valid instrument for measuring these variables (Stratil, 1988).

When surveyed, CSI clients report that their use of the program results in increases in retention, improved satisfaction with advising, increased use of campus services, and increased student engagement. Further data from the program provide compelling justification for resources that support student success.

Motivational Assessment

Students complete the survey online. The questions are then comprised into scales. These scales are constructed from the inventory items to provide a detailed view of each student's motivation, coping ability, and receptivity to assistance, as well as additional demographic information about the students. The table below shows the scales available on each of the different CSI versions.

The Scales

For a detailed description of each scale, visit the RMS Resource Library for the Scales Description resource (found within reviewing your results).

CSI Form B	CSI Form C
Study Habits	Study Skills
Reading Interests*	Reading Habits
Verbal and Writing Confidence	Verbal Skills
Math and Science Confidence	Math Skills
Commitment to College*	Commitment
Interactions with Previous Teachers*	Attitude Toward Educators
	Use of Technology
Family Support*	Personal Support
Financial Security*	Financial Security
Capacity for Tolerance*	
Career Plans*	Life and Career Planning
Social Engagement	
Academic Assistance	Academic Assistance

Personal Counseling	
Social Engagement*	
Career Guidance	Career Planning
Financial Guidance	Financial Guidance

The College Student Inventory (CSI)™ Reports

Individual Reports

Advisor/Counselor Report: a one-page synopsis of each student's strengths, needs, and background. They are made up of:

Student Report: This report parallels the Advisor/Counselor Report, but includes supplemental narrative that explains the student's score on each scale and is written in second person. Clients can add information about specific resources they offer to include in the student's report. Used during the individual student conference, this report validates the student's need for services.

Coordinator Report: parallels the Advisor/Counselor report with the addition of the Summary Observations scores.

The reports are made up of the following information:

- *Motivational Assessment* allows advisors to identify the student's areas of greatest strength and need at a glance. The motivational scales are reported in two ways: as a percentile rank and with a bar graph.
- *Student Background Information* provides a context for discussing motivational patterns within the scales.
- *Specific Recommendations* for each student provide action steps based on need and receptivity scores. The strength of each recommendation is indicated by its priority score.
- The *Summary Observations* (only present on the coordinator report) provide a preliminary overview of a student's levels of risk and receptivity, which helps you to prioritize your interventions. Though this sensitive information should never be shared with students, it may be shared with advisors, success coaches and counselors at the coordinator's discretion.

For samples of the reports, contact StudentSuccessTech@RuffaloNL.com

Summary Reports

The **Summary and Planning report** provides aggregate data on the students who have completed the CSI in three key areas: mean scores on the scales by gender and in comparison with national norms, distribution statistics on all of the demographic items and the means scores on all of the areas in which students are asking for assistance. Clients use the Summary & Planning Report to help faculty and staff understand the non-cognitive trends of their entering students, to target students based on demographic characteristics and to prioritize program/services planning based on the students' expressed needs, aligning campus resources with the priority needs of incoming students.

The Integrated Summary Observations with Receptivity Report provides an integrated view of your students' scores across the summary scales and the individual receptivity scales. Desire to transfer is indicated for students at four-year institutions only. In addition, the Excel table with your students' scores may be downloaded for additional filtering. Students with percentile scores of 80 and above on one or more of the summary scales **and** scores of 65 and above on one or more of the receptivity scales are highlighted in the table. For these students, scores of 80 and higher on the desire to transfer are highlighted (four-year institutions only).

The Mid-Year Student Assessment (MYSA)™

Background

As a result of client requests, the Mid-Year Student Assessment was developed as a post-test to the College Student Inventory, Forms B and C (online only). Students complete questions similar to the CSI, but updated to reflect the time they have spent in college. The results show the scores from the CSI and the scores from the MYSA indicating personal growth and development on each of the scales for the student. In addition, students report their commitment to earning a degree from their current information or indications they plan to leave the institution or transfer to another institution prior to graduation.

The Mid-Year Student Assessment (MYSA)™Reports

Individual Reports

Advisor Report: shows the student's CSI results compared with their MYSA results (pre/post test) as well as updated information about the students changes with regards to plans to study, plans to work, anticipated GPA at the end of the term, degree aspirations and intent to graduate or transfer.

Student Report: **Student Report:** This report parallels the Advisor/Counselor Report,

Summary Report

The MYSA Summary and Planning Report presents the full MYSA results in the aggregate. The mean percentile scores for each of the scales are shown compared to the mean percentile scores from the CSI results. The areas of request for assistance are shown with the number of students reporting in what areas they have received help already and in what areas they are now seeking assistance. Students study needs and intent to transfer are also updated on the MYSA.

Clients use the Summary data for reporting on the growth and development of their students from the beginning of the semester, planning second term initiatives based on the needs expressed by the students for additional assistance, and reporting on where students have received help to date. Identifying students who are planning on transferring or not sure about their continued enrollment allow clients to directly address the concerns of these students and create possibilities of more students continuing their enrollment.

For samples of the reports, contact StudentSuccessTech@RuffaloNL.com

The Second-Year Student Assessment (SYSA)™

Background

Because improving the success rates of second-year students is a critical part of improving completion rates, RNL developed the Second-Year Student Assessment. It is used in three ways: 1) as the third survey taken by the same cohort of students as they move through their first and second years of college; 2) as a stand-alone survey for clients who want a needs assessment of their second year students as they design a second year program and 3) for entering transfer students.

The scales measured on the SYSA include: academic confidence, commitment to college, engaged learning, leadership, transition, family support and financial security. The areas of assistance students can indicate include: academic assistance, advising, career planning, financial support and personal support.

Think of the SYSA as an opportunity for the student to reflect on the first year of college and re-assess his/her strengths and challenges within the context of the second-year academic demands.

The Second-Year Student Assessment (SYSA)™Reports

Individual Reports

The **Advisor report** shows the student's results as a percentile score, the areas in which the student reports having already received help and the areas in which they now want help as well as the student's sense of satisfaction in thirteen key areas. Advisors gain an understanding of their second-year students including if the student intends to stay with his/her current major or change as well as the student's intent to graduate from this institution.

The **Student Report** allows the student to reflect on their motivation in key areas of student success and engagement as well as identify the areas in which they need assistance and their satisfaction with essential components of student life.

Summary Report

The **SYSA Summary & Planning report** presents the aggregate data on the students who completed the SYSA by showing the mean scores for each of the scales (and the items comprising each of those scales), the distribution of responses between 1-4 and 5-7 as well as national comparisons. The information on needs for assistance are indicated by areas in which they have already received assistance and areas in which they want assistance now.

The Export function of the Retention Data Center allows clients to sort the data on any criteria, or combination of criteria, from the SYSA and prepare outreach lists to be shared with campus partners for outreach.

Retention Data Center™

Administrations and report retrieval are accomplished through the Retention Data Center. This secured site serves as the location to:

- Set up administrations
- Establish permission rights for your colleagues' access to the data
- Access individual and summary reports
- Send personalized email communications (for both student invitation purposes as well as support for assessment and intervention activities
- Filter data to tailor your outreach initiatives
- Customization and branding

The Data Center allows you to customize your web administration by applying your campus logo and adding supplemental campus-defined questions. Your logo will appear on each page of the survey along the top banner and custom questions appear at the end of the standard items found in each inventory.

Whether you use paper-pencil or web administrations, you can insert campus-specific paragraphs about your services to enhance your referrals to service offices. Each of the general topics (Academic Motivation, General Coping, and Receptivity to Support Services) allows you to enter 1,000 characters of text. This text displays as the first paragraph in the written interpretation texts found on pages 2-4 of the Student Report. You can send this text with paper-pencil administrations and RNL will enter it as your answer sheets are processed.

Reports

Reports are accessed via the Retention Data Center immediate after a student completes the survey. Individual reports are provided after each student completes the surveys. You may access aggregate Summary and Planning Report(s) for your entire group and subgroup reports for particular classes, majors, or advisors. Subgroups may be identified by using a 4-digit group number on the answer sheets or from a customized drop down menu offered to students completing at the web.

Logistics of your survey administration/pulling reports

How do we get started?

To order the CSI/MYSA/SYSA, select the survey band you wish to purchase at our Order Form. Upon order, RNL will process your order. You should expect details regarding your survey setup and invoice in the next week. Upon receipt of your survey details, you can customize your survey.

Which version should be purchased?

The CSI is available in Form B (100-items) and the Form C (74-items) through the web. Form B is our most widely used, but Form C is geared toward Community Colleges and non-traditional students. Comparison of the scales is found above. The MYSA is statistically tied to the CSI Form B (100-items) or the CSI Form C (74-items). Select the form that matches your CSI administration earlier in the term. The SYSA for your second-year or transfer students.

Who should complete the survey?

The **College Student Inventory (CSI**) identifies the individual strengths and challenges for each member of your incoming class, as well as their receptivity to your interventions, early in the first term. Therefore, we suggest you invite your entire incoming first-year class.

The **Mid-Year Student Assessment (MYSA)** is the follow-up survey to the College Student Inventory™ (CSI) and is compatible with CSI Form B and Form C. It compares the strengths and challenges of your students at the mid-point of their first year and shows you how to adjust your interventions to meet students' current needs. We suggest you invite all students that are still enrolled and have completed the CSI.

The **Second Year Student Assessment (SYSA)** can be used with second-year students and with transfer students to receive feedback including their level of engagement, commitment to college, and receptivity to assistance from advisors, academic support offices, career counseling, and other campus services. We suggest you invite your entire second-year or transfer cohort.

How do students complete the survey?

Students complete the survey online. You determine if you want to:

- Distribute the survey specific URL. This is our most widely used implementation plan. It can be used in printed material, during orientation, as an in-class assignment or in a portal. The survey specific URL can also be turned into a QR code for promotional material.
- Distribute personal URL links. After students have been imported into your account, you can download their personal URL (under Export Data). This can be used in a portal, emailed locally, or sent via email from the Retention Data Center. We offer sample email templates and resources on whitelisting, but we don't suggest using this as your stand-alone implementation method. Prior to sending emails from the RDC, you will need to complete email/domain verification steps with our team.

How long does it take to complete the survey?

Students need approximately:

- CSI Form B: 25-30 minutes
- CSI Form C: 15-20 minutes
- MYSA: 20 minutes

- SYSA: 20 minutes

When should we administer the survey?

Institutions typically administer the CSI during summer orientation, fall orientation, or the first few weeks of freshman seminar. Online versions can be administered prior to summer orientation, so that you are ready for one-on-one student conferences during summer orientation. Try to administer the CSI early, however, also balance this with the importance of not having too great a time span between when the CSI is administered and when the Student Report is discussed with the student. Early administering allows you to prepare fully for interventions however, if you intervene months later, the data may not have as much relevance.

The MYSA is administered toward the end of the first term or early the following term. Institutions may also choose to administer this assessment at the end of the summer term for first-time students who completed the CSI earlier in the summer.

The Second-Year Student Assessment can be administered prior to, during, or immediately following the first term of the second year of college or at the end of the freshman year.

What needs complete to launch the survey?

Refer to our Pre-Survey Checklist to complete the necessary steps to launch your survey.

How should you prepare your faculty or staff?

We offer strategies and resources for your colleagues to effectively use the RMS surveys at your institution. This includes:

- Examiners Instructions to assist faculty and staff in administering the survey to students. Found within the RMS Resource Library.
- Tips on “Getting campus buy-in”. Found within the RMS Resource Library.
- On-Demand and customized training options are available tailored to fit the needs of you and your colleague. To learn more, please Contact Us.

How should you prepare your students?

Since students are asked to reveal personal information by completing the survey, it is helpful to create a sense of trust by building rapport. This rapport can be accomplished by preparing a few comments that will be directly communicated to students or emailed to students. A few simple tips are:

- Provide an introduction to the purpose and goals of the inventory.
- Remind students that it is important to read all instructions in the CSI carefully.
- Emphasize the value of this inventory for students to “get started right” in their college experience, and remind them how they can receive their results.
- Be clear on the expectation to complete the CSI and inform students of the timeline within which they can do so.

How do we access reports?

You will be able to view, print, or save individual reports or sets of reports as students complete the survey. Summary results and exportable data will also be available. You also have the ability to retrieve filtered sets of students for report retrieval, summary reports or outreach. For more information on this, reference the Retention Data Center Users Guide found in the Resource Library of the Retention Data Center.

How do we share reports with our advisors?

The term "CSI advisor" is used throughout this guide and denotes any faculty member, professional advisor, counselor, or mentor who may be responsible for discussing the results of the CSI with students. You are responsible for providing them with access to the appropriate CSI Reports. As you consider who should have access, you will need to:

- Decide which type of report(s) the advisor should be able to access and for which students.
- Decide if you allow the advisor access to the Coordinator's Report and Summary Reports
- Decide if they should have access to Restricted Reports, i.e. those from students who have responded "No" to item 100 on CSI - Form B, or item 74 on CSI - Form C.

How do we share reports with our students?

We recommend that advisors share the CSI Student Report in a one-on-one meeting with students. Additionally, instructors in freshman seminar courses often ask students to write a reflective paper and establish personal goals and action steps based on their CSI results.

If you choose, the option exists within survey administration of the Retention Data Center for students to:

- have immediate viewing of their student report upon completion of the online CSI
- receive an email immediately after completing the survey with a link to their results
- receive an email manually sent from the Retention Data Center with a link to their results at a later date

Regardless of the forum for sharing the report, it is important to be sensitive when discussing results with students.

How do we engage others on campus?

There are a number of options to consider in working with your colleagues, including professional advisors, student success coaches, counselors, residence hall directors, and others in student services. Nevertheless, you should take steps to ensure that everyone is adequately informed about the CSI/MYSA/SYSA. Providing the Advisor's Guide and Resource Guide will present them with information for interpreting and effectively using the Advisor/Counselor Reports. An array of resources are available for your reference at the client communities site.

You may wish to encourage all involved colleagues to leave some open blocks of time to confer with students who have been identified as needing help with specific areas. You can also encourage them to plan special group activities for students with certain types of needs.

You may want to schedule focus groups with students who have lower scores that you want to understand in order to facilitate appropriate referrals.

Your colleagues in all support areas will need to be prepared to receive referrals based on the CSI results, especially those based on high receptivity scores.

Some examples of special workshops that have been developed for groups of students with similar needs indicated by the CSI reports include:

- Managing Test Anxiety
- Enhancing Exam Skills
- Reading for Comprehension
- Developing Effective Study Habits
- Fostering Self-Esteem
- Charting Your Career path

- Strategies for Problem Solving
- Managing Your Money
- Managing Your Time
- Overcoming Addictions
- What You Need to Know About
- Financial Aid
- Relationship Building in College
- Developing Your Leadership Potential
- Cultivating Communication Skills
- Stress Management Techniques

To follow up on the identified strengths and needs of each individual student in the resulting reports, most institutions depend on the involvement of their advising and student services staff. To engage them, we recommend that you first give advisors, mentors, and student service offices sufficient notice that you would like to intensify your student success initiatives through early intervention.

Involve administrators and the retention committee in this new initiative and enlist their creative ideas and support for using the data. If you want, request the setup of a test administration within your account. You can allow your administrators to take the test for themselves and see the report outputs.

To launch the initiative, most institutions plan an initial training session that focuses on uniting the efforts of advisors and student service providers. You will want to explain the overarching goals for the effort, such as enhancing student success and retention at the programmatic level, as well as the value of the individual reports in allowing each entering student to more readily adapt to your educational environment. Be sure to specifically highlight the value of the Summary and Planning Report for prioritizing services in relation to student needs.

To ensure a strong start, you may wish to contract with a RNL consultant to assist with launching the initiative, educating your colleagues on how to interpret the findings for individual students, and for assistance with using the aggregate findings in action plans at the programmatic level. Please contact us for details at ContactUs@RuffaloNL.com.

CSI/MYSA/SYSA Interventions

Individual Interventions

One-on-one conferences between an **advisor, mentor, freshman seminar instructor, or counselor** and a student have proven to be the best way to attain results from this program.

In these conferences, the Student/Advisor Report is used to facilitate a dialogue about the student's strengths, challenges, and goals. In addition, through the referrals that result from these meetings, students become connected to campus resources and aid them in capitalizing on talents and managing areas of concern. This approach helps to strengthen student-centered initiatives while engaging the incoming class.

A variety of effective models exist for managing the one-on-one meetings and the resulting referrals to campus services. Among the most expansive of these models are collaborations between academic and student affairs.

For example, student success or academic support center colleagues may work with academic advisors to ensure outreach to students. Or, freshman seminar instructors may assign a reflective paper and action planning exercises as part of their curricula, based on the Student Report. Some campuses develop new student success coaches or mentors, trained to dialogue with the student about their report and refer them appropriately to campus services. In many cases the academic advisors or professional advisors incorporate a more proactive approach that ensures the student receives holistic advising beyond course scheduling early in the term.

We encourage you to choose one or more of these models or design a more suitable alternative. For more detailed examples, please contact us directly, read the examples below, or see a few of our clients' case studies.

How institutions are using the CSI to intervene with individual students:

- Administer the CSI online prior to summer orientation then arrange one-on-one conferences with advisors, counselors, or mentors during summer orientation.
- Administer the CSI online versions during summer or fall orientation and arrange one-on-one meetings at those times or during the first weeks of the term.
- Administer the CSI online versions in a freshman seminar course and schedule one-on-one meetings with instructors or advisors in conjunction with assignments.
- Administer the CSI online versions through residence halls and schedule one-on-one meetings with residence staff.
- Provide small group opportunities to discuss topics related to academic motivation and personal support, then ask students to sign up for a one-on-one conference with advisors, counselors, mentors, or freshman seminar instructors to discuss their unique strengths and needs more specifically.
- Deliver the student reports through a student success course if one is available. The instructors should meet with students individually or at least provide opportunities for such contact. Instructors ask students to write a reflective paper on their Student Report as part of a class assignment. Advisors or first-year experience instructors then use these reflective papers to determine the areas where students need further direction or encouragement.

- The individuals conducting such groups or courses should receive the same training in the use of the surveys as they would under the advisor plan.
- If resources are limited, you may wish to start by intervening first and foremost with students who display characteristics of being at risk as identified by the assessment in the Summary Observations scales, in a discrete “triage-like” effort. Then, as your infrastructure evolves, you will be able to reach more students beyond this list, extending your personalized outreach more deeply and broadly within the incoming class.
- Administer the MYSA in an FYE course and conduct follow-up conversations with instructors or advisors. Incorporating MYSA into advising and course selection appointments is a great way to get the conversations started.
    - Advisors interact with students on a more personal level to determine their thinking around the current college plans they have indicated: 1) plan to complete my degree/certificate here, 2) plan to transfer, 3) do not plan to continue, or 4) undecided.
    - Share reports with academic counselors to ascertain the potential relationship between the student’s plan to transfer and the availability of their desired major.
    - The section on the MYSA reports entitled, “Students’ Needs and Interests” is used to assess the utilization of existing student support programs and determine where services are needed the second term.
    - The Students’ Needs and Interests section may provide insight on the impact of new student support programs, helping to document the need for new or expanded services.
    - Students who indicate a desire for assistance or additional information may be targeted for special outreach through advisor’s collaboration with appropriate offices.
    - The Academic Motivation scales serve as a springboard for dialogue between the student and the advisor. For example, if the student ranks himself high on study skills but is getting low grades, the advisor has an opportunity to consider any contributing factors such as work hours, study time, major, and matters related to course delivery.
    - Students who show significant declines in two or more areas of Academic Motivation or General Coping could be targeted for personal follow-up.
- Administer the SYSA and conduct follow-up conversations with advisors. The Academic Motivation scales serve as a springboard for dialogue between the student and the advisor about confidence in academic ability, engagement in the learning process during the previous year, and the level of commitment to completing a college degree and/or program of study. The Social Motivation scale provides an opportunity to explore untapped leadership potential with the student, while the Coping scales provide a window through which the student shares the non-academic challenges he/she is experiencing.
    - The Students’ Needs and Interests section provides insight on the impact of first-year student support programs and document the need for new, expanded, or continued services for the second year.
    - Students who indicate a desire for assistance or additional information can be targeted for special outreach through advisor collaboration with appropriate offices.
- Administer the SYSA and conduct follow-up conversations with advisors for course selection appointments. Advisors interact with students on a more personal level to determine their

thinking around the current college plans they have indicated: 1) plan to complete my degree or program here, 2) plan to transfer, 3) do not plan to continue, or 4) undecided about plans. The "major" question provides an excellent opportunity to determine how committed students are to their current academic program or how close they are to making a decision.

- Share reports with academic counselors to ascertain the potential relationship between the student's plan to transfer and the availability of the desired major.
- Administer the SYSA through residence halls and have residence hall staff conduct one-on-one meetings with the students. Think of the SYSA as an opportunity for the student to reflect on the first year of college and re-assess his/her strengths and challenges within the context of the second-year academic demands.

Whatever strategies are adopted for interfacing with students, *results must be interpreted in context* of all information available.

Programmatic Interventions

To enact timely interventions at the programmatic level, you'll want to look at the aggregate scales and information provided in your Summary and Planning Report to review the strengths and needs unique to your incoming class.

Summary and Planning Report

To enact timely interventions at the programmatic level, you'll want to look at the aggregate scales and information provided in your Summary and Planning Report. You'll see the areas in which your students are above the mean, and the areas where they are below. From this, you'll be in a position to tailor your programming and align your resources based on the themes of motivational assessment for your incoming class.

The motivational profile presents a simple, straightforward analysis of your students' group tendencies on the CSI/MYSA/SYSA. You receive the means for your group on all major scales and demographic or background items. For example, the report compares your students' motivational patterns with the national norm and also provides such background information as the level of parental education.

The information in this section is useful in identifying any special strengths or challenges of your students as a group. You can identify the strengths and challenges of your incoming class. For instance, your class may have a high desire to finish college, but low study habits. This would help as you plan how to prioritize your services and position your student success initiatives. Or if your aggregate report indicated some lower coping scores, you might wish to incorporate a college adjustment component into your orientation program. Also included in this section is a list of the possible specific recommendations for students. These recommendations are weighted by how often they appear in individual student reports. This list is helpful in identifying the most needed services and programs for students inventoried with the CSI.

You may find that your overall campus programming is out of step with current needs—either for the entire incoming class or for a targeted subpopulation. (it can be used to compare results across cohorts within the freshman class using custom groupings such as advisor, first-year experience course instructor, major, etc.) Or, you may learn that a specific support resource such as math tutoring should be re-focused, expanded, or consolidated with other service areas. The first few pages of the Summary and Planning Report are often shared with retention committees, given the ready profile it provides of the incoming class in the areas of academic motivation, personal support, and receptivity to services, demographic overviews, and recommendations for action.

The Summary and Planning Report may be used as a component of the program assessment for student support services, especially those relying on special funding. Incorporate the composite data from the Summary and Planning Report into internal assessment processes. For example, insights into academic self-assessment and retention may be illuminated by examining composite scores on the Academic Motivation scales in relation to time for studying, work hours, and current institutional impressions.

When reviewing the MYSA Summary and Planning Report, think of the comparison of the pre- and mid-year results as a "reality check" for students. Help students think through any over-estimation or under-estimation of their strengths and challenges. Below are some guiding questions:

- What do students' responses indicate about the integration of their needs and interests in relation to existing programs and services?
- What are the patterns observed in the increases and decreases in student motivation and general coping skills? What might these suggest?
- Do the students' responses in Institutional Impressions suggest hypotheses about current reenrollment plans?
- Do the changes noted in the demographic information provide insights for results in other sections of the report?

When reviewing the MYSA Summary and Planning Report, think of the Summary and Planning Report as a campus "reality check" for all areas referenced in this student assessment. Below are some guiding questions:

- What do students' responses indicate about the previous integration of their needs and interests in relation to existing programs and services?
- What patterns are observed in academic motivation, social motivation, and general coping skills? What might these suggest?
- Do the students' responses in Institutional Impressions suggest hypotheses about current re-enrollment plans?
- Does the demographic information provide additional insights relating to student motivation, needs and interests, and institutional impressions?
    - The Summary and Planning Report may be used as a component of the program assessment for student support services for the first year, and as a projection of need for services during the second year.
    - The composite data from the Summary and Planning Report can be incorporated into internal assessment processes. These data provide additional information that can help to illuminate the student's GPA and academic progress via Academic Motivation scales, as well as study plans, work plans, and institutional impressions.
    - The Summary and Planning Report may be used to compare results across groups within the second-year student population using custom-defined items such as advisor, residence hall, major, etc.

Summary Observations with Receptivity Report

The summary scales provide a balanced overview of potential risks for first-year students. The overall risk index considers the student's background and historical patterns of achievement. Desire to transfer indicates the students' initial intentions to remain at your institution to complete a degree or program of study.

Together, these scales form a unique picture of the students' perceived needs and their receptivity to your help. Unlike the *Summary and Planning Report*, this report allows you to identify patterns of need and receptivity for your most at-risk students in table format.

Color highlights are applied to student scores of 80 or above on the summary scales and 65 and above on the individual receptivity scales to reveal the patterns. Scores of 80 and higher on desire to transfer for these students are also highlighted.

If you choose to print this table, only the scores within the parameter defined above will appear on the printed copy, even though you are able to see the lower scores in the online view of the table.

You may apply your own filter to the data by defining the value (scale) and range of the scores in the drop down menu. The Excel table may be downloaded for additional analyses, as well. For instance, colleagues may appreciate the opportunity to filter their data by a value (scale), such as "Receptivity to Financial Guidance," and use the Excel table to email students about relevant workshops, such as those on financial literacy.

Workshops/Small Group Discussions

Among the most manageable interventions at the programmatic level are workshops or small group discussion. Colleagues will frequently use the top Recommendations for Action to tailor workshops for students during the first few weeks of the term. For example, if your Summary and Planning Report shows "get help with study habits" or "discuss qualifications for occupations" as top recommendations, you know the importance of these workshops early in the term. Residence halls and success centers also find this prioritized list of recommended actions useful in their programming. Further, freshman seminar instructors will look at their classroom subgroup data and emphasize skill-building and development in areas such as study habits, academic confidence, or career closure, wherein their students' scores may be below the mean. Powerful filters in the Retention Data Center technology platform make your targeted interventions effective and efficient.

Outreach List

RNL has developed a resource titled "Strategic Student Outreach List". It provides suggested lists to pull (including the filters to apply, fields to export, and additional fields to consider exporting) and suggestions on what to do with the list. The resource is available with the Resource Library of the Retention Data Center.

Managing Referrals

Referrals allow you to extend the value of the CSI/MYSA/SYSA by directing students to those services that provide them with the skills, opportunities, and support they need to become independent learners. Many campuses are able to increase the number of referrals by matching students with the services they indicated as relevant or desirable on the CSI.

Student referrals to appropriate educational resources are managed through partnerships between campus service professionals, advisors, and you, the Coordinator. Your role will include:

- Providing campus-specific supplemental text to insert under the primary categories of the student reports' narrative. These categories include: Academic Support, General Coping, Miscellaneous, and Receptivity to Support Services. It's especially important to list these service offices under the category of Receptivity to Support Services, to display in the CSI student report narrative text.
- Taking the lead in updating your resource and referral guides and customized report text annually and sharing it with advisors.
- Meeting with the referral offices to develop a strategy for using the strategic filtering and outreach list resource outline in the Resource Library.

Student Information Systems (SIS)?

RNL's Retention Management Surveys (RMS) allow an institution to retrieve reports/data for import into their campus system from the RMS Retention Data Center (RDC). There is no direct integration between the two systems (campus system and the Retention Data Center), but via an RNL secure file transfer protocol (SFTP) site. The outcome is easy access for advisor/success coaches/students to review reports and use RMS data for raising flags and impacting student initiatives. Additional detail can be found within the RMS Resource Library or by Contacting Us.

Broader Conversations

Use of the CSI and a closer look at the aggregate data and individual reports often stimulate broader discussions about student success and retention among the campus community. To facilitate and extend this discussion, RNL can bring a national perspective to the table. If you are interested in learning more about how our consultations can assist with early-alert initiatives or overall retention challenges, or if you are interested in a CSI workshop in particular, please contact us for details.

Assessing Outcomes

Importance of assessing CSI/MYSA/SYSA outcomes

The pressure is increasing for institutions to retain and graduate more of their students. There must be continual follow-up of referrals, accurate record keeping, and accountability to ensure that students' needs are addressed in the most constructive manner.

Properly implemented, the CSI/MYSA/SYSA can help to facilitate those efforts. Unfortunately, the implementation often stops short of assessing the qualitative and quantitative outcomes of the CSI/MYSA/SYSA interventions. To ensure maximum benefits to both students and the institution, it is important to establish desired outcomes of the interventions early on and to develop a process for assessing these outcomes.

Sometimes the scores on the Summary and Planning Report can suggest the need for additional resources in key service areas. For example, if a campus has low scores on math confidence and high scores on receptivity to academic assistance, this information can be used to support budget requests for additional resources to accommodate more student interventions.

Several creative coordinators have pointed out that they were able to subsidize first-year advising, purchase equipment, and add counseling, advising, or academic support staff by demonstrating to their administrators that the increased retention rate had saved the institution thousands of dollars in one year alone, money which could be spent, at least in part, on necessary services and staff to address students' needs. The Retention Revenue Estimator at the RNL website can help you determine potential savings at your institution.

Desired Outcomes

Identify the outcomes you intend to achieve before the CSI is implemented. It is beneficial to seek input from those who will be involved in implementing the program and collecting data.

When asked, clients identified their primary goals in using the CSI as follows:

- 67 percent want to foster student success through early alert and interventions.
- 55 percent want to *increase retention and graduation rates*.
- 22 percent want to *inform their student-centered advising practices*.
- 18 percent want to *increase student satisfaction with advising and campus services*.
- 14 percent want to *inform their assessment initiatives*.

Other outcomes mentioned in the survey included: to have *a starting point for conversation* and follow-up, to assist in *a more meaningful conversation, t*o help students make *a personal connection with a faculty or staff member,* and to begin *dialogue with students about their motivation in college and the goals they plan on setting*.

Measuring Outcomes

After you and your colleagues identify the desired outcomes you hope to achieve with the RMS surveys, you must then decide how you will measure those outcomes. You need to identify how the outcomes data will be collected. We encourage you to identify qualitative and quantitative measures that allow you to evaluate your progress at regular intervals. Both general and specific success measures may be appropriate, depending on your objectives and situation.

When CSI adopters were asked to indicate *the measures* they used to assess their effectiveness in reaching the goals they had established, their responses were as follows:

- Persistence, progression, retention, or completion rates
- Student satisfaction with advising and other academic services
- Grade point averages
- Qualitative feedback from students
- Qualitative feedback from advisors or mentors
- The number of students on probation (first year and second-year) as well as those who effectively recover their academic standing
- Number of referrals to campus services, such as academic support, career counseling, personal counseling, etc.
- Improvements in institutional revenue from higher retention and graduation rates.
- Quality, quantity, and timeliness of focused interventions for different populations
- Satisfaction with level of interaction with advisors, faculty, course offerings, and other
- The use of support services on campus, including the number and quality of referrals
- Improvements in institutional net revenue based on higher retention or graduation rates
- The level of commitment and focus across your campus in proactively addressing needs of students
- Qualitative feedback from advisors or mentors, referral offices, and students
- The use of support services on campus, including the frequency and quality of referrals

Measuring your success will help you in subsequent planning to address more of your students' needs earlier in the term and throughout the second year. This will allow you to continue engaging and integrating students into your campus community. With more precise information, you are positioned to (re)engage and (re)integrate students into your campus community with greater confidence.

The Mid-Year Student Assessment and Second-Year Student Assessment provides you with a tool to evaluate student progress at a very important juncture in the educational experience. Because the second year of college continues to be a time of uncertainty for many students regarding future re-enrollment, results may serve as an important measure for advancing student success.

The most common model for maximizing the impact of the MYSA-C initiative is the direct involvement of the advising and student services staff. Engaging them as soon as possible is key to their ongoing and active involvement. Accordingly, advisors, mentors, student success coaches, and student service offices should be notified early on that mid-year reports will be made available to them.

The Advisors

Who are the advisors?

The term "advisor" is used throughout the Retention Management System guides and denotes any faculty member, professional advisor, counselor, mentor, or success coach who may be responsible for discussing the results of any of the surveys with students.

Some of the most desirable qualifications of the advisors are:

- Strong concern for students' well-being
- Genuine interest in student development
- Generosity in their approach and guidance
- Willingness to work with the relevant reports
- Credibility as a student advocate
- Ability to establish rapport with students

Generally speaking, advisors are characterized as those who are willing and interested in using the survey and analytical to work effectively with students. It is counterproductive to work with advisors who do not wish to use the tool.

Do advisors need special instruction?

You are the point person for selecting and guiding the advisors through the content presented in the relevant Advisor and Resource Guides. Once your advisors are selected, you need to arrange for special instruction on how to effectively use the instruments and results. This is most often accomplished by planning a workshop or a set of workshops to facilitate the instruction.

The purpose of the workshop is to prepare advisors to interpret and utilize the Advisor/Counselor Reports and the Student Reports. By the end of the workshop, the goal is to have the advisors feel reasonably comfortable with: the instrument, patterns of motivation as indicated in the reports that are generated, and their use of this program in student development initiatives.

You will want to consider the following questions as you prepare for your advisor workshop:

- **What is the best time to schedule the workshop?** We recommend that the workshop be scheduled before classes begin in the fall or after classes have ended in the spring to eliminate the challenges of scheduling a half-day session with advisors after classes begin. If you are unable to schedule the workshop in one session, we find that two separate sessions can work equally well.

- **How much time is recommended for the workshop?** If possible, the workshop should be scheduled for four hours on one day or for two hours on two days. The absolute minimum amount of time required to adequately cover the CSI content and allow time for hands-on experience with the reports is two hours. Three hours is recommended for the CSI Coordinator who has limited experience conducting workshops.

- **Who conducts the workshop?** As the Coordinator, you may conduct the workshop(s) yourself or you may choose to contract with a RNL associate consultant to come to your campus. Contact RNL to learn more about the financial and time investment for this.

- **What preparations do advisors need to make before the workshop?** Advisors are encouraged to read the Advisor's Guide and other relevant resources found at: rnl.com/RMSresults It is helpful for the advisors to review the items and report samples on the survey as well.
- **What information should be covered?** The Advisor's Guide is the primary source of information for the workshop, with an emphasis on the meaning of the scales in the CSI, effective ways of discussing reports, role-plays of advisorstudent conferences, and referral management.
- **Are follow-up sessions worthwhile?** Follow-up sessions after mid-term are helpful for both coordinator and advisor. It is an opportunity for the coordinator to encourage advisors to track the progress of their advisees, especially with regard to referrals. As part of this discussion, you may want to consider the Mid-Year Student Assessment as an accompaniment to your interventions. Through on-going discussions, advisors are able to share their experiences with the program and provide feedback that can help to inform the workshop agenda for the next term/year, thereby helping you to attain the most benefit from this initiative.
- **What's included in a typical workshop agenda?** The typical agenda includes examining the components of the CSI, interpreting sample CSI reports, role playing the advisor-student conference, and updating the resource and referral guide.

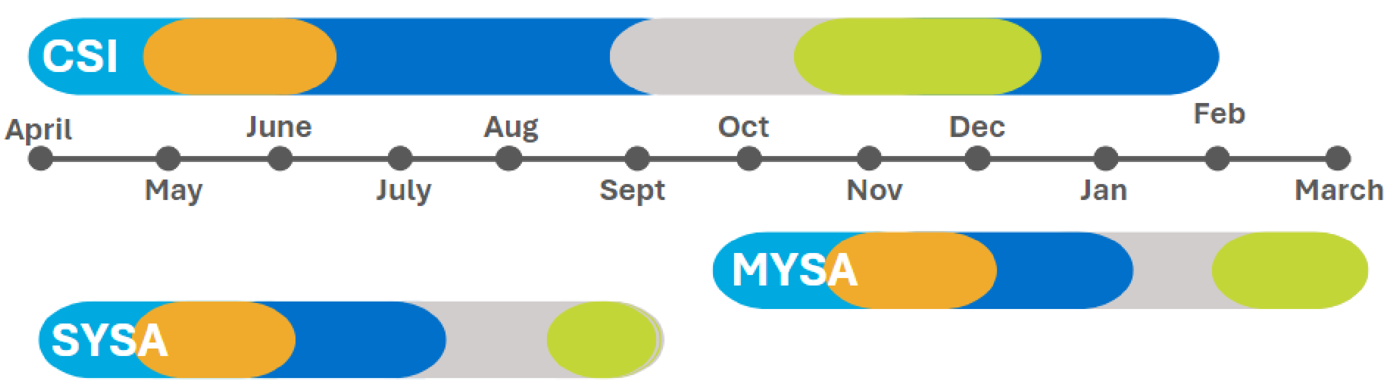
Planning for your own workshop

As you prepare your advisors for their training, we suggest that you take a bit of time to gather the pieces that they will need as well as considering what you want to share with them. Our RMS Resource page should have the desired documents: rnl.com/RMSresults

- Survey Scale Descriptions
- Survey Samples
- Report Retrieval instructions for pulling reports from the Retention Data Center
- Overview Documents
- Conversation Starters
- Worksheets and Assignments
- Referral Form
- Student Contract for Next Steps
- Emailing Students (from the Retention Data Center)

RMS Surveys Suggested Timeline

The suggested timeline below is designed to help RMS clients survey their students at the appropriate time and set a guideline of when they should be reviewing and sharing the results. Each step of the process is important and should not be forgotten. With that in mind, if you have a different timeline in place that works well for you and your campus, stick with it! If you have additional questions, feel free to contact us at:



Key CSI Timeline Items

Item	Suggested Timeline	Additional Resource
Order Surveys	April	Orders can be placed at rnl.com/orderRMS. About a week after your order is placed, we will set up your survey. After setup, you can customize your survey.
CSI Survey Customization	April-May	Data Center Documents – See Survey Customization (custom grouping fields, securing access of reports, custom questions and custom report narrative text).
Consider Campus System Integration	April-May	Data Center Documents – See Campus System Data Integration. RNL offers individual reports and/or a file can be posted to an RNL SFTP site specific to your institution. You can retrieve reports from this SFTP site for posting into your campus system. Contact RNL to start the SFTP site setup.
Advisor Training	July-August	Resource Webpage – Includes materials to assist with training your advisors/success coaches. Contact us – for additional training options.
Upload CSI Student File	Prior to Implementation	Data Center Documents – See Uploading Student Records to track students that have not completed the survey.
Implement CSI Survey	June-August	Resource Webpage - We have many implementation options but would suggest aligning with a required activity, such as a pre-enrollment check-list, in orientation or an in-class assignment. Your goal should be 100% completion.
Upload CSI Student File	Post Administration	Data Center Documents – You can upload your original file again. This will help update any records that were incorrectly updated by your students.
Advisor/Student Interaction	August-September	Resource Webpage – Includes materials to assist your advisors/success coaches with student interactions and interpreting the reports.
CSI Data Review	September-October	Resource Webpage - Be sure to review our Data Review Webinar recording or schedule time with a consultant.
Distribute Student Lists with Key Departments	September	Resource Webpage – See recommended lists to pull. These lists allow you to collaborate with different departments on campus for workshops or outreach.
Share your Results	September-December	Resource Webpage – Populate our infographics to ensure the data you are capturing is being seen by other departments!
Implement CSI to Spring Admits	January-February	You can simply add your spring admits to your existing survey administration. Be sure to have conversations with them post survey completion.

Key MYSA Timeline Items	Suggested Timeline	Additional Resource
MYSA Survey Customization	October	Data Center Documents – See Survey Customization (custom grouping fields, securing access of reports, custom questions, and custom report narrative text).
Implement MYSA Survey	November-December	Resource Webpage - We have many implementation options but would suggest aligning with a required activity, such as an in-class assignment. Your goal should be 100% completion.
Advisor/Student Interaction	December-January	Resource Webpage – Includes materials to assist your advisors/success coaches with student interactions and interpreting the reports.
Distribute Student Lists with Key Departments	January-February	Pull list to share across campus and summarize your data so others are aware of all the good things you are doing.
Share your Results	January-February	Resource Webpage – Populate our infographic to ensure the data you are capturing is being seen by other departments!

Key SYSA Timeline Items	Suggested Timeline	Additional Resource
SYSA Survey Customization	March	Data Center Documents – See Survey Customization (custom grouping fields, securing access of reports, custom questions and custom report narrative text).
Upload SYSA Student File	April	Data Center Documents – See Uploading Student Records to track students that have not completed the survey.
Implement SYSA Survey	April-June	Resource Webpage - We have many implementation options but would suggest aligning with a required activity, such as an in-class assignment. Your goal should be 100% completion.
Advisor/Student Interaction	April-September	Resource Webpage – Includes materials to assist your advisors/success coaches with student interactions and interpreting the reports.
Share your Results	July On	Pull list to share across campus and summarize your data so others are aware of all the good things you are doing.

RMS Survey Setup Checklist

Completed	Tab in RDC	Task
☐	Preparing (not in RDC)	Prepare by reviewing the Online Admin Resource page. Here you will find our templates, video tutorials, and Users Guide.
☐	Planning (not in RDC) *Remember to reach out to our team if you need assistance!	The majority of your time will be in the planning phase. Determine how you will: • achieve your desired completion rates • train advisors/success coaches • access reports (will you have them pulled into your campus system or pull them yourself from the Retention Data Center (RDC) • review results with students • use your summary data (outreach list, data pulls for strategic planning, etc) • track your retention goals and outcomes
☐	Survey Settings	Update your survey customization. This includes: • Grouping – students with demographical fields provides additional sorting and filtering opportunities beyond what is collected through the standard items of the surveys. Up to 5 categories can be used; commonly used are Academic Advisor, FYE Instructor, Residence Hall, Indicated Major, etc. • Securing access of reports – This allows you the ability to designate others on campus for access to specific groups of student records (outlined above) with limited access to areas of the Retention Data Center and reports available for students. • Survey entry page: Allows you to request specific information for Id and e-mail. Example: “Please enter your 7-character student Id here. (W234567)” or “Enter your university.edu address here”. • Custom Questions – These are multiple choice questions and require a single selection response from the student. They appear at the end of the survey, after the standard items. Custom questions are also filterable and exportable for further analysis. • Narrative text on individual reports - Up to 1,000 characters (500 for SYSA) can be inserted as the first paragraph of each of the categories. • Survey completion email customization - Upon completing the survey, students will receive an automatic email. You can customize the contents of this email message.
☐	Data Import	Use our template to upload a student file containing email address, first name, last name, DOB, and other optional fields. It isn’t required that you upload a file, but it is suggested.
☐	Survey Distribution (typically not in RDC)	Determine how you will distribute your survey. • **Distribute the survey specific URL.** This is our most widely used implementation plan. It can be used in printed material, during orientation, as an in-class assignment or in a portal. The survey specific URL can also be turned into a QR code for promotional material. • **Distribute personal URL links.** After students have been imported into your account, you can download their personal URL (under Export Data). This can be used in a portal, emailed locally, or sent via email from the Retention Data Center. We offer sample email templates and resources on whitelisting, but we don’t suggest using this as your stand-alone implementation method. Prior to sending emails from the RDC, you will need to complete email/domain verification steps with our team.
☐	Survey Settings	Before launching, be sure to preview your survey and ensure all your customization appears as expected. Survey Sample is found on the Survey Summary section of your survey setup.

Resources Available to You

As a client using our Retention Management System (RMS), you have access to both the Retention Data Center and our Resource Library. The Retention Data Center is where all things related to the implementation of the survey are located (survey setup, report/data retrieval). The Resource Library is a website with resources available to best assist you with using the product.

Our resources are organized to meet your needs based on where you are at in the planning or implementation process. Visit the website today.

