



Using Mission, Mindset, and Metrics to Build a Community of Care

a whitepaper by

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This whitepaper is authored by Dr. Stacey Ludwig Johnson, the SVP of Western Governors University and Executive Dean of the WGU School of Education. Dr. Ludwig Johnson leads the academic and operational strategy for the School of Education. As a pioneer in competency-based education, she has invested more than 24 years envisioning, creating, and implementing academic services, including faculty and clinical experience models, that optimize student progress, retention, and success.

Using Mission, Mindset, and Metrics to Build a Community of Care A Blueprint for Colleges and Universities to Serve All Students

With 24 years of experience at WGU building our 360° Community of Care for students, I'm often asked how one should build a support system that serves a diverse student body. In the School of Education, we are focused on mission, mindset, and metrics. What follows is a blueprint others can use and adapt to address and meet the needs of students – from wherever they are on their academic journey.

STEP #1: ALIGN WITH THE MISSION AND VISION

Translate your mission to your “why” and your “way”

At WGU, we always start with the “why” – why are we here, what is our highest purpose? For us in the School of Education that means starting at the highest level with the **WGU mission: “To change lives for the better by creating pathways to opportunity.”** Since our inception 25 years ago, we've focused on meeting the needs of students frequently overlooked by traditional higher education models, specifically low-income, first-generation college, working adults, and students of color.

Before you bring your team together to build anything, you need to make sure they are aligned on why you each come to work every day. In addition to the university mission - **the why** - we also align on **the way**. How will we serve the mission? I recommend a document or statement that brings some definition to the way in which that mission or vision is going to play out daily in the work your teams do.

THE WGU SCHOOL OF EDUCATION WAY

- We can change lives for the better by catalyzing next-generation teaching, learning, and leading across the education spectrum
- To catalyze next-generation teaching, learning, and leading, our students need to experience next-generation teaching, learning, and leading
- This transformative work needs a transformative work environment - we work to foster organizational services, systems, and culture that allow SOE team members and partners to do our good work in increasingly better ways.

At the WGU School of Education, we are champions of next-generation teaching, learning, and leading. We align our work through our **School of Education (SOE) Way**.

Document your tenets

Articulate and agree on your organization's tenets as your decision-making principles. Ours range from a commitment to support our students as individuals with personalized instruction and care, to recognizing that our people are our School, and how we engage our team is evidence of our commitment to our mission, vision, and cultural beliefs. Revisit your tenets each year as you write or hone your strategic plan because as the organization evolves, so will these decision-making principles. For example, at WGU our increasingly deep focus on access and equity will have the School of Education adding a new tenet this next round stating 'We believe all students can learn.' This decision-making principle or tenet will cause an organizational shift in the design and delivery of our curriculum and the Community of Care that accompanies it in the coming years.

STEP #2: ALIGN ON YOUR NORTH STAR

Document what success looks like

For a team to excel they must not only be aligned but also must know what success looks like. It's critical to talk this through and revisit the conversation every year. There are many creative and engaging exercises you can do in this ideation process. With the onslaught of initiatives ever-present in higher education, it can sometimes be an important parallel activity to decide what your team will *not* do that year.

Do a future-you press release

As we wrap up each fiscal year, our leadership team writes an imaginary press release as if it was five years from now. We look at our five-year plan, think about changes in the organization and the market, think about scaling, and then create a document that describes who we are and what we accomplished once we hit our five-year goals. It's a great visioning exercise.

Define your success metrics

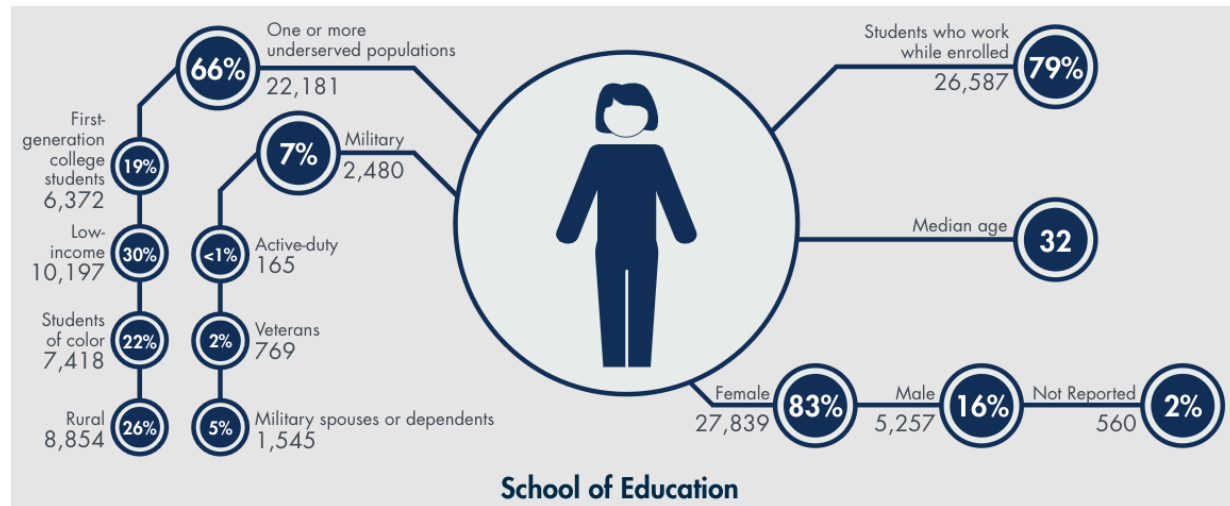
Now that you've decided what success looks like, (and what distractors to avoid) it's time to agree on how you are going to measure success. At WGU, we looked at the success metrics that everyone's performance was measured against. For many years we've closely monitored student engagement and pacing, drop rates, term-to-term retention, graduation rates, time to graduation, and student satisfaction. We are incredibly granular in our scrutiny of these metrics. Because we meet weekly to examine them, we can be agile and pivot or change whatever is not working, and scale what is succeeding.

Tie your metrics to your key results

We were founded with a strong alignment to workforce relevance in our degree programs so employer satisfaction and rankings are also examined. We continue to evolve and meet new



market demands. This forces us to examine our objectives and key results frequently. We are also an access institution. Our key results today still use the success metrics listed above but bubble up into three key results that serve our mission to improve lives by opening pathways to opportunity for all students. Our key results are Equity, Access, and Completion. Below is a snapshot of our students as of June 2022.



I can't overstate the importance of aligning on these three areas: (1) mission and vision, (2) your why and your way, and (3) how you'll know if you're winning. There is much demand for resources in any institution, and rather than tossing money and personnel hours at each new opportunity that comes along, you'll be able to make sound decisions that profoundly and positively impact your organization and the faculty, staff, and students you serve.

STEP #3: MAPPING THE STUDENT JOURNEY

Start from first-touch marketing and map through graduation

Now it's time to map your student journey. You may need several maps if you have different student journeys and quite different student personas. Start at the beginning – how did they first hear about your university or college? Was it a media placement or an advertisement, maybe an event or webinar? Work through each step of the process for application, admittance,



enrollment, matriculation, and completion/graduation...and even into the alumni journey. Where in your marketing funnel do they begin to engage? What are their first questions and needs? As they begin courses what hurdles are in the way that causes them to pause or drop? The reasons for the drop may be incredibly complex for working adults or it may be glaringly simple. It may be as simple as frustration for them at taking time off work to drive to campus and not being able to find parking in a timely manner. Maybe they need daycare. Maybe they are managing young children and elder care. In our case, prospective

students need a website that is easy to navigate – even at our scale – and once they enroll, they need easy direct access to live support with extended hours for everything from tech support to academic support to financial aid counseling, and more.

Communication audits and focus groups

Look at the communications that go to your students. If you are scaling as rapidly as we have it's important to look at any batch processing of communications and emails and make sure they are still relevant, timely, and up to date. If they no longer have high value for that student stop sending them. Students are flooded with emails, nudges, texts, and calls by most schools, and we owe it to them to only push the communication they need at that point in their journey. A biannual audit of communications to students is a great practice.

You also want to ensure that the message you have in these communications is still aligned

LISTEN AND LEARN WITH FOCUS GROUPS

One of the most important aspects of student journey mapping that often gets overlooked is to talk with your students. Focus groups are essential. Your team is probably too close to the communications and content to be impartial.

At WGU we have ongoing focus groups with students and prospective students, and we learn something game-changing every time.

with your brand, which evolves. If you are an on-ground institution, go walk the path students take. What do they see? They want to feel safe, secure, and welcome. They want to feel like they are not alone. What do you have in place for them to find early in their exposure to your campus that supports them? Maybe it's an information kiosk

or student ambassadors that volunteer a few hours a week to be visible on campus to answer questions. If you are an online institution, how easy is it to access program contents and criteria, or reach a faculty or staff member to support them by phone or web conference?

Identify hero moments and moments of friction

Another aspect of mapping the student journey is identifying moments of progress, momentum, and acceleration, or as we like to call them, hero moments where the student excels. Then also map and identify the friction points, moments of slowing, and any experiences students perceived as negative. It's important to look at both and learn how to scale what's working while reducing the friction points.

Include how you will surface and capture data for use

Most universities are data-rich environments, though many do not fully take advantage of the data. The answer to your questions is in your data. Work with your teams to identify which data you can capture and gain insights from as a student progress on their journey. Spend significant time on this step because it will be the foundation for much of the work that follows.

Student personas

I recommend doing this entire mapping process for at least three student personas, for example, working parents, career changers or transfer students, and first-time full-time students. Though many aspects of the journey will be similar, you will typically find very different entry

points and reasons to enroll, and very different reasons to lose confidence or momentum, and drop out.

STEP #4: DEFINE THE GAPS BETWEEN THE NORTH STAR AND YOUR CURRENT STUDENT JOURNEY

Create your intervention roadmap

There will always be gaps between where you are and where you want to be...for every university, no matter how successful. That's where your intervention roadmap comes into play. Once you have mapped your student journey across several student personas, and you know what data you're capturing, then it's time to work with your teams to start articulating which interventions you want to try and test. See where your opportunities reside.

Pilot, test, and ensure feedback loops

It's important to constantly examine your progress through feedback loops including but not limited to data and metrics and quantitative measures. Also, use qualitative data and employee focus groups, and student feedback to see which interventions are working to get you closer to your goals. You may be tracking a cohort over a long period of time – from admission to graduation, or short, small groups of students receiving various interventions within one large enrollment course. Work with your teams to really understand what it is you're measuring and how that intervention is going to get you the data or findings you need.



STEP #5: DEFINE THE SUCCESS METRICS – WHAT ARE THE DRIVERS?

Set your targets for successful outcomes and stretch goals

The first few times you set your success metrics targets and drivers, whether quarterly or annual, it's going to be more an art than a science. I'm an advocate for stretch targets because we've recently been collectively amazed at what we were able to accomplish by getting clear but stretch goals and targets. Targets might be the number of students you graduate each term, or the two-year and four-year completion rates – these are very important success metrics for us. Your student mapping journey can help inform you at this step.

Fishboning exercise to build your driver trees

You want to keep unpacking the target metrics until you get to the lowest most granular level possible, building driver trees in fishboning exercises. For example, if the number of graduates a term is your target metric, fishbone out a driver tree of all the critical steps that lead to

graduation. For example, student retention just became a success metric because they must be retained to graduate. Then examine what drives student retention, such as engagement, on-

time progress, academic support, timely feedback, and so on.

Interactions happen at the lowest actionable level

Get as granular as you can and as close to the student as possible. This is where the mission – mindset – metrics trio really surfaces. Your mission guides your work at the highest level. Your

metrics will tell you if you are on the course at various steps along the way to your North Star. Your mindset – learning to understand your student personas through the mapping and exercises you've done, will help you decide where to interact and when in the student journey so the intervention can be personalized to be not only what that student needs, but also to be there *when* they need it.

Identify early signals

At WGU, one of our key results is completion. So, we did a fishbone exercise with that. We know retention is critical to completion, so we unpacked all the various things that have to happen for a student to be retained from term to term. On-time progress is one of these items.

Thanks to our data insights, we know now that a student who is likely to make progress in a term and be retained to the next term has had at least three live, personal interactions with a faculty member in that term. If we have a student with slow momentum, we escalate the nurture phase intervention and ensure they have three live 1:1s with a faculty member.

For different students at different universities, this will vary, so you will want to drill down into your data and find the drivers that feed your unique success metrics that align with your key results. Once you do this exercise, you'll be able to visualize your data set in a fishbone you can test. You may find that something driving drops in the first term was not what you expected regarding student interaction but maybe to the number of previous college credits they transferred in, or gaps in financial aid vs tuition cost.

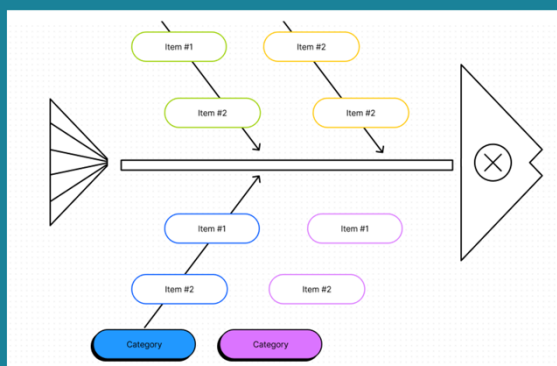
Look for interactions between multiple measures and challenges

At WGU we have extensive workshops each quarter where the leadership and care teams re-examine the drivers and data from them. We come together for two full days and examine our assumptions against the results. Then we calibrate our interventions, set our signals, and evolve our Community of Care system to bolster student success. This creates a culture of always-on innovation which will benefit your students.

Fishbone Diagrams

Also called Ishikawa Diagrams, these visualizations should be created with your team in brainstorming exercises.

A helpful website to get started with these exercises is [figma.com](https://www.figma.com/templates/fishbone-diagram), which includes explanations and templates.



Source: <https://www.figma.com/templates/fishbone-diagram>

Personalization in the Community of Care

Let's say you have a student enrolled in a course and they haven't shown up for the first two weeks of class. That's an early signal at a high level that you have a retention and completion risk. Now you must decide why. Is it a lack of confidence in the subject matter? Can the student find transportation or parking? Do they need to know bus routes? Is it because they are working two jobs and raising kids and need help with time management? These are all plausible reasons for a slow start, and all three have completely different intervention needs. Therefore, mindfully creating your care team, based on your data and drivers, is very important.

For student A the reason they have not attended this Composition class may be because they are an on-campus student, and it requires them to sit in unpredictable and lengthy traffic jams to get across town and then drive around to find parking. Moving the course to a different time of day or making a hybrid schedule with some online courses might be a solution for that student.



For student B perhaps they aren't making the Composition class because they are an IT major, and they don't see the value in core curriculum classes. For that student, a talk to help them understand that the skills employers are wanting today are very much tied to general education, and 'human' skills including the ability to write and communicate effectively, abstract reasoning, critical thinking, and more.

And for Student C it may be this student has been out of school for a long time and acquired considerable business skills but has done very little writing. So, for that student, the intervention needs to be confidence-building with either a peer mentor or access to a writing lab. A truly student-centered care team will dive in and find out not just what is happening, but also why and bring the right intervention to the right student at the right time. You also need to look at who the student is most likely to take a call from. A student may not respond to one team member's call where they might to another.

STEP #6: CREATING A CARE TEAM

Build for individual care, at scale

At WGU we've been doing this for 25 years and we still evolve our care team each year as we learn more. With our continued focus on accessibility and equity, our care teams are of the utmost importance because we realize that not every incoming student is going to be ready for

advanced university work – so we have to be ready for them. Our care teams will likely include someone from financial aid, student services, academic support, operations, healthy learning, and so much more.

Deciding whom to include

This is not a model where a student speaks to an advisor once a year for a schedule and then operates independently of care teams for the remainder of the year. The robust Community of Care has personnel from across your student journey sharing insights to help determine what each student needs, and when. Getting cross-functional teams around the table once a week to drill into the data can make sure a student who is losing momentum can regain it, and successfully complete the term. It can also help high-achieving students learn more and move more quickly through their coursework. To learn more about the various aspects of our [Community Care, take a look at this three-part series](#) I wrote that identifies each member group and highlights the care they bring.



STEP #7: THE ULTIMATE GOAL

Intelligent, adaptable systems that support mission, mindset, and metrics

At WGU we are progressing ever deeper into expanding an intelligent, adaptable system that provides predictive modeling. With predictive modeling, we can intervene early, and at scale.



The positive difference this makes is visible in real terms when we look at our completion, equity, and access metrics. We aren't just admitting and enrolling an increasing number of students each year; we are also working successfully to get them across the finish lines and into careers where they can contribute to their organizations and communities.

That's our mission – To change lives for the better by creating pathways to opportunity.

Knowing your students, working your data, and building a comprehensive, compassionate Community of Care makes it possible to open doors with personalized instruction and support to students everywhere.