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Agenda for Retention Alert Discovery

Client: Los Medanos College
Ellucian Service Provider: Stacia Bullock
Engagement Dates: September 3rd & 4th, 2013

Objectives:

- Gather the information necessary to complete the Decision Workbook with Retention Alert module implementation specifications.
- Create/sign off on specifications document
- Discuss Reporting for Retention Alert

Below is the proposed agenda. The Discovery process is fluid and varies each time depending on the material covered, your requirements, and the team members involved. We ask that you be prepared to be flexible with the topics and timeframes.

TUESDAY (September 3, 2013)

Agenda	Desired Outcome	Timeframe
Introductions	• Introduce Team members	9:00 – 9:15
Overview of Retention Alert	• Describe what Retention Alert is and its benefits • Define key terms and concepts used in Retention Alert	9:15 – 9:45
Demonstration	• Provide the team with a basic understanding of how Retention Alert operates and how setup decisions will impact the functionality	9:45 – 10:30

Discovery	• Gather information about how to use the Retention Alert module capabilities to help manage institutional retention resources and meet retention goals.
	• Acquire information needed to complete the decision workbook.
	  • Identify Organization Roles
	  • Identify Organization Role Members
		10:45 – 12:00

	LUNCH	12:00 – 1:15
Discovery	• Identify Case Categories • Identify Case Types (Manual vs Batch) • Determine timing of batch case creation • Determine Case Type priorities	1:15 – 3:00

WEDNESDAY (September 4, 2013)

Agenda	Desired Outcome	Timeframe
Discovery	• Define case type criteria • Define case type assignments • Decide Reporting/Admin Access for Org Roles	9:00 – 12:00
	LUNCH	12:00 – 1:15
Discovery	• Discuss Communications Management needs • Discuss Contact Methods • Identify Case Closure Reasons • Review security classes • Computed Column/Subroutine naming	1:15 – 3:00

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Retention Seminar Outline

I. Day 1

A. Introductions

- Personal Introductions
- Understanding Your Students
- Understanding Your Curriculum
- Understanding Your Current Systems
- Various Definitions
- Sorting through the numbers

B. Benchmarking Retention

- Benchmarking Retention
- Defining Your retention goals
- Reasons for Retention
- Defining Your reasons for retention

C. Environmental Strategies

- Why do students leave?
- How do you know?
- Develop Your Environmental Strategies

D. Mitigation Strategies

- Brainstorm Mitigation Strategies
- Develop Your Mitigation Strategy

II. Day 2

A. Early Warning Signs

- What might indicate a leaver?
- Brainstorm a list of Demographic Factors
- Brainstorm a list of Behavioral Factors
- Identify the source(s) for the factors
- Develop Your Early Warning Signs

B. Systems to Identify the Leavers

- Personal Knowledge
- Tools & Systems
- Begin to develop Your Leaver Identification System

C. Intervention Strategies

- Understanding your students
- Connecting with the Leaver
- Effective Communication Strategies
- Developing Your intervention strategy