



EVALUATION
REPORT

Evaluation of the Florida Consortium of Metropolitan Research Universities

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INTRODUCTION AND SCOPE

INTRODUCTION

In September 2020, Equal Measure began a learning and outcomes focused evaluation of the Florida Consortium of Metropolitan Universities (“the Consortium”) to understand its effectiveness in accelerating student achievement, increasing career success, and advancing momentum in Florida’s major metropolitan areas. The engagement identified and evaluated process and intermediate outcomes that connect the Consortium’s current strategies and activities to measurable leading and lagging indicators. This approach elevates strengths and opportunities for the Consortium to solidify its collaborative infrastructure and value to the university partner communities.

The Consortium strengthens Florida’s talent pipeline through sharing ideas and scalable solutions which accelerate learner achievement and access to economic opportunity. It leverages the unique assets of Florida International University (FIU) in Miami, University of Central Florida (UCF) in Orlando, and University of South Florida (USF) in Tampa Bay to form a coalition. The Consortium honors the individual structures and culture of each institution and its region; at the same time, the it is collectively committed to a shared goal of advancing the success of first-generation, diverse, and underrepresented learners. **In seven years, the Consortium has evolved from an informal partnership driven by the common interests of its university presidents to an entity recognized across campuses as a driver of emerging, learner-centered initiatives that stand to benefit most from shared and collective mindsets, practices, and policies.**

The Consortium initially tracked and published its progress in a 2018 brief¹ authored by the Helios Education Foundation, a major funder and thought partner. It demonstrated its approach to aligning student success practices through best practice dissemination, adoption of shared platforms for collective learning and improvement, and coordination with statewide partners. Since its inception, the Consortium saw improvements in four designated measures:

1. Number of baccalaureate degrees awarded;
2. Six-year graduation rate for minority students;
3. Percent of graduates employed full-time or continuing education; and
4. Median salary of employed graduates.

Of note, the Consortium also built strong conditions for inter-institutional collaboration in university curricula, care services, and instructional methods. Our evaluation continues on the Consortium’s path of developing systems and processes to solidify and communicate its value to the universities in service

¹ “Universities Form Florida Consortium of Metropolitan Research Universities to Accelerate Innovation toward Student Success” [brief](#)



to achieving stronger student outcomes. (See Appendix A for more context on the Consortium's evolution.)

"Having laid a foundation for the exchange of best practices, professional development, and curriculum-related learning communities, the Consortium is well poised to serve as a model for postsecondary institutions serving a similar student population."

[Helios Education Foundation Brief](#)

EVALUATION SCOPE

Equal Measure's 2020-2021 evaluation provides an external expert perspective on the Consortium's progress and achievements. The evaluation was designed to build on the Consortium's current learning agenda, anecdotal evidence, as well as support formative learning and evaluative capacity for continuous improvement.

The evaluation approach focused on three of the five goal areas in the Consortium's 2019-2024 Strategic Plan—**Student Achievement, Career Success, and Fostering Conditions for Success**.² To understand what has been achieved from efforts in the three strategic goals, we leveraged a sampling of project-based initiatives of the Consortium (see Appendix B). The evaluation scope was designed to answer a set of key questions aligned with early conversations with Consortium staff, the Helios Education Foundation, and operational leads at each university:

- In what ways and to what extent is the Consortium and its three university partners making progress on its student-centered goals through a selection of project-based initiatives?
- What processes and implicit factors undergird the Consortium's approach and effectiveness?
- How can the Consortium leverage its external communications and partner relationships to advance its work?
- How can the Consortium continue to track its progress and refine its approaches with indicators tailored to its impact?

Evaluation Methods

The evaluation's methodology was qualitative, including interviews, focus groups, and document review (See Appendix C for a Summary of Methods and Appendix D for a List of Interviewees). A qualitative approach provides a strong foundation for learning about initiatives like the Consortium—initiatives that are relatively young in their evolution, have strong anecdotes about effectiveness, and have not had formal, third party evaluations in the past. The qualitative approach allows the evaluation team to elevate diverse perspectives from a range of stakeholders who may interface and understand the Consortium's model in a variety of ways.

² The two remaining Strategic Plan Goals are *Operate with Excellence* and *Advance the Consortium*.



Our approach involved two phases. During the Discovery Phase, we conducted interviews and focus groups with key Consortium, Helios, and University staff overseeing the Consortium. During the Evaluation phase, we conducted interviews and focus groups with university staff and external stakeholders engaged with Consortium activities. The report's findings represent the collective insights gleaned from a small yet highly involved set of interviewees; the qualitative methods allowed the team to probe for evidence and detail to substantiate findings across stakeholder experiences. Throughout the course of the evaluation, we met regularly with Michael Preston, Executive Director of the Consortium, and Paul Perrault, Vice President of Research and Evaluation at Helios Education Foundation. During these meetings, the evaluation team coordinated data collection activities, provided progress updates, and discussed questions that arose along the way.

Conversations with the Consortium began in January 2020. The evaluation team initially planned to visit each campus in the Consortium in-person and potentially observe a convening or set of working meetings. The COVID-19 pandemic forced a change of approach and we did not have the opportunity to meet Consortium stakeholders in person. In addition, the effects of the pandemic and the rise of a racial justice movement in 2020 naturally altered the conversations and interviews we held with stakeholders. We made time on our Zoom calls to check in with evaluation stakeholders, ensured their needs were met during the rapid rebalancing of life and work priorities, and provided additional time for scheduling to accommodate shifting schedules. We witnessed the delight of colleagues across the three universities in seeing each other's faces after many months apart and the sadness of lost opportunities to connect in person and with more frequency. We are thankful to those who made time to speak with us and for the opening to lead this work in a humanistic and inclusive manner.

Evaluation Outline

This report is intended to deepen collective understanding of the Consortium's outcomes, elevate the implicit factors that accelerate progress, and guide the Consortium's future direction, including its strategic plan implementation. The evaluation report is structured as follows:

- **Evaluation Findings**
 - Overarching Evaluation Findings
 - Project-based Evaluation Findings
 - Accelerate Student Achievement
 - Increase Career Success
- **Considerations**
 - Learning and Communication Framework
 - Communications
 - Strategic Data Use
- **Appendices**
 - A. About the Florida Consortium of Metropolitan Research Universities
 - B. Evaluation's Project-based Sources
 - C. Summary of Methods and About Equal Measure
 - D. List of Interviewees



EVALUATION FINDINGS

The findings for this report are presented in two ways. First is an overview of overarching takeaways from the Consortium evaluation that reflect process strategies and outcomes across the strategic goal areas, demonstrating how the Consortium **Fosters Conditions for Success**. These takeaways are drawn from analysis of reflections from key internal and external stakeholders in past and present Consortium collaborations. In the second section of the Findings, we offer formative learning from the Consortium's current efforts to **Accelerate Student Achievement** and **Increase Career Success** to offer the Consortium real-time reflections to immediately inform refinements and deepen the approach. More details about the Consortium's strategic goals can be found in the [2019-2023 Strategic Plan](#).

OVERARCHING EVALUATION TAKEAWAYS

The Consortium has evolved since an informal network of university leaders and stakeholders sought to elevate the value of collaboration, shared learning, and best practices to benefit student success in Florida's major metropolitan regions. Several opportunities emerged early on to conceptualize and resource the Consortium and begin to plot out a shared course for the University of Central Florida, University of South Florida, and Florida International University. Over the past several years, the early activities began to solidify into an approach that is highly valued by university staff, faculty, and leaders for its ability to create unique spaces and conditions for greater interdependence, innovation, learning, and coordination.

In this section, we focus on findings around the strategic plan's goal of **Fostering Conditions for Success**. The findings are understood additionally through **six process strategies that** guide the approaches of Consortium staff and operational leads at each university. In the call out box to the right, we highlight in green three process strategies which the Consortium is harnessing especially well to engage stakeholders and advance its goals.

Six process strategies

1. **Align best practices for student success**
2. Think big thoughts
3. **Lead conversations**
4. Write up the results
5. **Coordinate solutions**
6. Communicate for impact

The Consortium's approach is a welcome alternative to higher education's "traditional" culture and structures—which tend to value individualism and competition. The partnership encourages collective action, practices, and policies aligned with student outcomes in this cross-university collaboration, while providing each university the critical space to implement and sustain change according to their campus' unique culture, climate, and protocols.

The Consortium currently measures its success at creating the right conditions through communications indicators (e.g., website hits, awareness among university constituents) and resonance with university



partners (e.g., connectedness of Consortium’s institutional policy work with university mission). The evaluation scope looked to further uncover the effectiveness of this goal by learning about the process strategies and their success.

The Consortium is expert at elevating ideas across university partners. The Consortium is considered a “model” for convening university stakeholders in ways that promote cooperation and leverage institutional strengths. University stakeholders appreciate the clear commitment across the Consortium’s activities to prioritizing student learners first. The Consortium’s convenings and network meetings are consistently and reliably safe spaces—encouraging stakeholders to share practical experiences, borrow ideas, and adapt for institutional contexts. Because participants are cross-university, the conversations promote new and innovative approaches and rapidly steer partners away from past mistakes and ineffective trials their peers already tested. The constancy of convenings allow participants to build rapport and “pick up” where they last left off to ensure each conversation efficiently builds upon and advances on the last. There is broad consensus that the Consortium’s approach could be beneficial to many more university staff and departments, even those which lie outside its core goal areas.

“It lightens the load to know we are all moving in the same direction, and with our Presidents.”

Internal Consortium Partner

The Consortium makes coordinated action possible. An intentional, sequenced approach has emerged from the Consortium’s major convenings and approaches over the years. First, an issue area is identified in partnership with university leaders. The Consortium identifies a relevant set of directors and managers at each institution to lead the work. With planning and intention, the ideas of university stakeholders are surfaced at convenings and working sessions. Consortium staff then work diligently to maintain momentum by identifying cross-partner synergies, creating working structures, managing timelines, setting a constant pace toward mini-goals, and “getting out of the way” at the right moments. The Consortium staff and structure exemplifies an insider-outsider character that enables greater buy-in from decision makers. The Consortium brings the universities a level of focus and supports that allow staff to make resonant and concrete changes more efficiently. These efforts appear seamlessly executed, and, at their most effective, lead to critical policy and practice changes within each institution.

“When we started the Consortium, it was kind of akin to that outsider saying this is important and people listening to the outsider, [although] you’ve been saying it as insiders all along.”

Internal Consortium Partner



The Consortium's successes resonate with discrete audiences; broader audiences require a more refined message – with a focus on the change process. Awareness and knowledge of the Consortium has improved over the years at all three universities, especially among network and convening participants. In recent years, the Consortium made a linguistic shift from “pillars” to project-based activities, making it easier to “name” the work in ways that echo higher education vernacular. In addition, the Consortium developed and now collects with greater ease a common set of student metrics across the universities to visualize and communicate improvements in student-centered outcomes.

Even as understanding of the Consortium has improved, some misalignment between its activities and its indicators of success (primarily, student outcomes) continues to create confusion and raise questions:

- **What impact has the Consortium had?** The Consortium communicates impact through dashboards, presentations on the state of student success outcomes and the leading and lagging outcomes in the strategic plan. However, there is lag time in student indicators; and student outcomes are not solely the result of the Consortium—they involve a complex set of individual, institutional, systemic, and contextual factors. Our evaluation found stakeholders involved in the Consortium's current and past workgroups had trouble identifying tangible and measurable short-term or intermediate goals guiding their work. Without relevant metrics (e.g., following the emergence of new practices among career advisors or articulation agreements with state colleges), it is difficult for stakeholders to track progress, course-correct, or know when they have “succeeded” and are ready to move on.
- **How deep is the Consortium's impact?** While the Consortium has an established approach across project areas, there is considerable variation in the depth of activities, timing of impact, and potential for institutionalizing change. For example, some of its past work has been most effective at changing individual practices (e.g., Teaching and Learning convenings for faculty), whereas other work involves institutional policies with the potential for longevity (e.g., transfer guidelines). Projects around career success are perhaps most unclear given the slowdown from the COVID-19 pandemic; this evaluation could not discern the expected outcomes or clear progress to date on the Career Success work, and its potential depth of impact likely differs from other efforts. For stakeholders to understand the Consortium, it needs to be clearer on the *level of impact* that is possible from each of its projects (see Considerations for a potential framework).
- **Why should the Consortium be sustained?** Involved stakeholders value the Consortium and have a stake in its continuation. There are questions about its value from those less connected to the Consortium, and questions about the Consortium's long-term commitment to outcomes from those who were involved in past (now inactive) projects. There are also concerns that major leadership transitions and budgetary shifts post-COVID-19 may present challenges if the Consortium's strengths and commitments are not clearly and recognizably communicated.



The Consortium's broad and enduring value is its readiness to meet complex institutional and partnership priorities effectively and efficiently. The Consortium can better communicate its most potent asset – its unique, dynamic, and strategic approach to institutional change on behalf of student success. In two of its simplest forms, the partnership is referenced as a collaboration among three institutions or understood through its project areas. These messages are undoubtedly resonant with those most involved in and benefiting from day-to-day work. However, there is potential to develop a singular message and comprehensive brand resonant with broader internal and external audiences. Messaging does not always elevate what its closest allies can see—the **Consortium has the ability to take on large-scale, emerging student issues nimbly and effectively** through an enduring and distinctive set of process strategies.

The Teaching and Learning work (see call out box) helped establish the Consortium's underlying approach, but a heightened focus on the project can cloud the actual value of the Consortium. While not initially envisioned as an area to pursue, the Leona M. and Harry B. Helmsley Charitable Trust STEM Teaching and Learning grant provided serendipitous time and space that established the Consortium's identity and situated it as an **effective and alternative way to lead and manage change in higher education**. More recent examples include the rapidly disbursed Helios grants for students at all three universities in the summer of 2020 to ensure completion during the pandemic and the Year of Reflection, engaging a range of Consortium stakeholders, including students, to enhance equity-minded approaches on campus.

Case in Point: Teaching & Learning

The Helmsley Charitable Trust-funded Teaching and Learning (T&L) work was the longest running of the Consortium's efforts to date and provided the evaluation team a chance to capture longer-term outcomes. T&L produced meaningful results during the grant and after it ended; those involved describe continual "ripple effects" to their work, departments, and campuses, including:

Awareness

- Executive administrators on campuses are more informed about degree-workforce alignment.
- "Art" of teaching re-prioritized among faculty.
- T&L materials are still accessible to all campuses and online.

New Relationships

- Participants still tap into relationships across institutions to address new and emerging needs.
- A cross campus survey to understand workarounds for faculty teaching and labs provided more extensive data during the pandemic in 2020.
- One campus learned from another about their approach to Americans with Disabilities Act (ADA) issues to inform their own changes.

Individual Practices

- Individuals pursued further education and promotions related to T&L.
- Excitement built to try new things out including rapid prototyping.
- STEM faculty fellows program expanded on one campus.
- Leads improved own facilitation and event planning.
- Faculty now use flipped classrooms, common final exams, and conceptual teaching methods.

Departmental Changes

- Learning Assistance Center's practices improved based on advice and lessons learned from partners.
- Several participants moved into leadership positions and use knowledge of teaching design in decision making.

Student Changes

- Final exams and calculus grades improved at one campus.



"The three years [we're] talking about, led to a lot more knowledge and trust and an easy communication pathway. There's been a long-term, knock-on effect of knitting together the people who do the work."

Internal Consortium Partner

The Consortium is increasingly advancing narratives to support an equitable approach to Florida's future prosperity of residents, communities, and the state. In response to the racial justice movements in 2020, the university presidents (referred together as the Presidents Council) confidently tapped the Consortium to lead Year of Reflection conversations amongst all three universities. Internally and externally, the Consortium is messaging a learner-centered commitment and helping others recognize the true diversity of students in Florida's metro regions in terms of age, race, and ethnicity as well as students who are parents or full-time employees.

For funders looking to scale the impact of their investments, the Consortium has great advantages to advance change across three major regions and benefit students and alumni, most of whom choose to live, work, and raise families in Florida. These benefits were attractive to funders such as Helmsley Trust and Helios Education Foundation in the partnership's early days. Today's philanthropies and large funders seek investments that address inequities, support upward mobility, recognize the struggles of those living in non-urban areas with less investments, and overcome systemic racism so clearly raised in the challenges of 2020. The Consortium's external partners are looking to generate collective action and movement toward equity as well. Like the emerging shifts in focus this past year, there may be ongoing opportunities to nudge the Consortium to attune its work beyond its current project areas and three-region focus.

Leveraging the power of external partnerships is nascent; dedicating more time, communications, and intention holds promise. The Consortium has identified a set of higher education, nonprofit, and business partners working in complementary sectors or regions and aligned with its priorities. They perceive the Consortium as a strong partnership, creating space for university stakeholders to learn from peers further along in their practices; there is a sense that the Consortium is generally making progress toward identified objectives, further validated by its external financial supporters and the power of this "triumvirate" of universities in the state. With more staff and resources, external partners see the Consortium emerging as a bigger player, capable of much greater impact.

External partners highly value presenting at each other's summits and conferences and appreciate the Executive Director's ability to connect meaningfully with a variety of audiences, especially businesses and employers. However, there is interest among Florida-based partners to learn more about the Consortium and potentially collaborating with greater strategic, actionable purpose. The Consortium staff's ability to communicate this will be increasingly possible once external partners gain a more holistic understanding of the Consortium beyond a single student outcome area that many of them have come to know. Providing a holistic picture of the approach, the work, and the Consortium's nimbleness in addressing emerging cross-university issues will help identify additional synergies among external partners.

Additionally, external entities are seeking strategic engagements with partners like the Consortium that **further their efforts through collective action**, such as systems change and state-level advocacy. To



accomplish this, the Consortium needs to first sharpen its communicated mission and values with external audience interests in mind. While collaboration and collective voice are valuable and recognized elements among the Consortium's three institutions, external partners are looking to advance their missions (particularly with education-focused institutions and partners). For example, it is not clear to external stakeholders whether the Consortium's best practice work is meant to support change at its three institutions alone or if there is interest in extending these benefits to all students attending any of Florida state colleges and institutions—often the key constituency of external partner organizations. It is also not clear how the Consortium decides to pursue issues and whether the Consortium would help advance external partners' identified priorities (such as reverse transfers) or cocreate advocacy platforms at the state level.



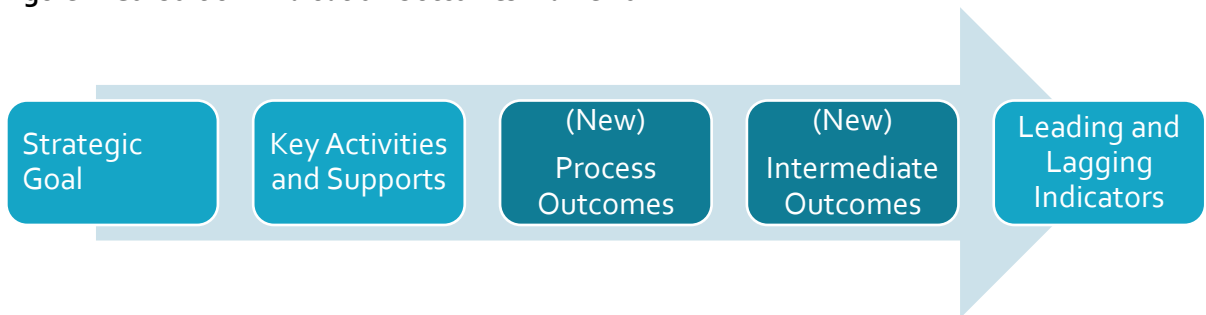
PROJECT-BASED EVALUATION TAKEAWAYS

In this second section of findings, the evaluation used an Outcomes Framework drawn from three sources: a theory of change designed for the Helios Education Foundation Brief, the 2019-2024 Strategic Plan, and the evaluation scope. Shown at a high level, the Outcomes Framework (Figure 1) and our evaluation activities aimed to discern and potentially expand the connections between three of the Strategic Plan’s goals and the Leading and Lagging impact indicators currently tracked by the Consortium. To that end, we added a set of Process and Intermediate Outcomes.

- **Process Outcomes** articulate *how* a program works within a particular context and to meet a set of intermediate or impact outcomes
- **Intermediate Outcomes** are forward-looking indicators that reflect the value of a delivered or ongoing program and suggest its likelihood of reaching long-term results

Equal Measure’s expanded Outcome Framework is meant to elevate the important “precursors” to student-level changes the Consortium tracks across partners. Precursors offer a measure of confidence that the Consortium’s efforts are heading in the right direction, before anticipated student success changes can be measured.

Figure 1. Consortium Evaluation Outcomes Framework



A draft set of process and intermediate outcomes were identified for two student goal areas (Accelerate Student Achievement and Increase Career Success) during the evaluation’s Discovery phase. Through continued data collection and analysis, we tested the resonance and applicability of the draft process and intermediate outcomes with a wider set of stakeholders involved in the Consortium’s work. What follows are findings from the two student goal areas and an updated set of process and intermediate outcome areas for each.

Accelerate Student Achievement

This goal area seeks to expand access, increase completion, and ensure college to career readiness for all students in the Consortium. Strategies to achieve this goal include:

1. Focus collaborative efforts on high-priority outcomes
2. Develop, apply, and document best practices for advancing student outcomes
3. Supply the resources to advance student success
4. Collaborate within and across institutions to share expertise and challenges



The Consortium is tracking its success based on institutional data on enrollment, persistence, and completion rates among students (including transfer students). These indicators are critical to track trends and demonstrate the value of collaborating, and institutional partners have successfully streamlined definitions, data analysis and reporting protocols. However, an enormous number of factors contribute to student achievement outcomes. Stakeholders are seeking evidence of the Consortium's effectiveness and confidence from a deeper understanding of the implicit factors that are likely to lead to student achievement success. The evaluation captured intermediate outcomes that speak to the Consortium's efforts in more timely and direct ways. In this section, we offer findings from the Transfer Success project work currently underway.

"The partnerships we form across the institutions help us help students. It helps us with efficiencies and strategies. You might think we are competitors, but we are all working together. The power of partnerships is front and center in my mind."

Internal Consortium Partner

TRANSFER SUCCESS FINDINGS

Buoyed by the passage of a statewide transfer metric, Transfer Success is increasingly becoming an area of prominence for the Consortium and its member institutions who are well positioned to meet the state's goals. From its unique position, the Consortium is elevating the conversation around transfer success. The Consortium's attention brings a sense of validation from a quasi- "outsider" to those working on transfers within the member institutions. And as a convener of its members, the Consortium provides multiple avenues for strengthening transfer success efforts within and across university partners.

While the Consortium did not initially focus on transfer success, the state's new performance funding priority pushed the Consortium to reflect on where it had "traction" and direct its strengths accordingly:

- Consortium members collectively serve 68% of transfer students in the state who go on to become a substantial portion of the Florida workforce.
- The Consortium is contributing to increased attention on transfer success across institutional partner campuses and extending its partnership model to two-year state colleges as well.
- Transfer success is inclusive of the Consortium goals to both accelerate student achievement *and* increase student career success.

The Consortium plays an essential role in enabling the growth of transfer success within and across members, as well as influencing efforts at non-member institutions.

The Consortium is appreciated for its modeling of how to shape the conversation around transfers, and as a strong facilitator of collaboration. Consortium members identified and maintained a focus on common priorities that institutional leads align with their own institutional goals and implementation. Through the opportunities facilitated by the Consortium to come together as peers, staff working on transfer success have strengthened relationships. By presenting an explicit forum for concentration on



transfer success, the Consortium brings an “intentionality” to efforts which stakeholders suggest might otherwise have proceeded ad hoc and in silos.

"It would have been really difficult without having the Consortium there. And I always say, 'For good, for bad, for everything in the middle, we're in a performance-based funding state.' And that, at times, guides priorities, focus, and resources. So, the Consortium has been a way to build some bridges, I think, from the gaps that my institution has. It's been a really good thing for me to leverage."

Internal Consortium Partner

The high degree of peer support is attributed to how the Consortium brings people together, setting an encouraging tone of collaboration. At the annual Transfer Success Summits, always open to any higher education professional in Florida, participants convene to interact and share learnings and resources for transfer success, supporting student engagement, and policy advocacy. The Summits help stakeholders adapt and build from existing resources for their own programs. In 2020, the Summit switched to a virtual format; participants appreciated the transition and the opportunity it presented to expand inclusion to professionals across the state at no to low cost. Emerging work, especially around transfer equivalency, has enormous potential to move beyond sharing and adaptation of materials to co-creating policies that improve Florida’s attainment and career success rates - creating efficient pathways to completion for students with two-year degrees and work or military experiences.

"[The] professional staff, the networking conversations: I've taken information that I learned from the Consortium, so I don't need to completely build something from scratch."

Consortium Partner

Similarly, the Transfer Success Network meetings are a more intimate venue where practitioners share best practices, approaches, and program materials. Indicative of the Consortium’s focus on strong relationships, meeting participants are comfortable disclosing “behind the scenes” insight into their day-to-day work in support of transfer students.

Without the Consortium, stakeholders are confident that transfer success efforts would be slower to progress; the Consortium and its supportive staff keep momentum moving. Efforts would also lack the intentionality the Consortium brings, with frameworks, goals, and opportunities for ongoing learning and professional development. In addition, the Consortium provides the “glue” for cross-campus efforts when there is staff turnover at a university, ensuring collaborative change and energy continue. The evaluation team developed an expanded approach to track and understand the outcomes of the Consortium’s efforts to Accelerate Student Achievement. Table 1 illustrates an evidence-based framework that draws from the strategic plan, current theory of change, and additional process and intermediate indicators captured in the evaluation. These new outcome areas reflect the “precursors” to student-level changes. The process and intermediate outcomes in which the Consortium has made the most progress are highlighted in green.



Table 1: Outcomes Framework: Accelerate Student Achievement through Transfer Success

Key Activities and Supports	Process Outcomes	Intermediate Outcomes	Leading and Lagging Indicators
Transfer Success and Student Success Summits	<p>Partnership: Shared sense of unity and accountability measures for transfer students</p>	<p>Partnership: Formalized relationships, transfer policies, and practices instituted across university and state college partners</p>	<ul style="list-style-type: none"> • Headcount enrollment (disaggregated by race/ethnicity, socioeconomic status, first generation) • Fall to fall retention (persistence) rate for FTIC students • Fall to fall retention (persistence) rate for transfer students • On-time (four-year) and six-year completion rate for FTIC students • On-time (four-year) completion rate for transfer students • Number of bachelor's degrees awarded (including first-generation, Pell, and minority students)
Network Meetings	<p>Creativity, experimentation, and ongoing connections among partners fostered</p>	<p>Institutional: Continually evolving versions of policies and practices reflecting lessons learned and best practices of all partners</p>	
Consortium Operational Lead meetings	<p>Enhanced learning on approaches and pitfalls from experienced perspectives</p>	<p>Staffing and resources modified, to implement and sustain successful transfer policies and practices</p>	
	<p>Institutional: Improved access to latest research, trends, and ongoing professional development for key staff</p> <p>Help fulfill departmental goals and ensures compliance</p> <p>Buy-in from decision makers, executives, and board</p>	<p>Departments function interdependently to improve persistence and completion and address barriers students face on and off campus</p>	
	<p>Field: Include non-Consortium postsecondary partners for inclusive and coordinated learning and exchange</p>	<p>Clear and continuous communication from leadership about priority of transfers</p>	
	<p>Elevate strategies and resources for wider audiences that help to meet state goals and serve Florida's students</p>	<p>Effective and institutionally-contextualized implementation and scaling to improve transfer outcomes and student success</p> <p>Improved narratives about adults, first-generation, and transfer students that honor their needs and assets</p> <p>Field: State system institutions, colleges, and departments function inter-dependently to improve transfer success</p> <p>Enhanced policies and data capacity in Consortium provides "an edge" in outcomes and performance-based funding</p> <p>Students who identify as students of color, first generation, and limited income experience seamless and improved pathways to degree</p>	

Green box indicates evidence of progress



Career Success

From its earliest inception, the university partners articulated in a Concept Paper presented to Helios Education Foundation in 2014 the roots of its current career success goal area: “By producing more career-ready graduates with lower debt, better training, and adaptable skill sets, the Consortium will drive the economic development of Florida by creating synergies and efficiencies between the state’s three large metropolitan public research universities and the public, private, and non-profit sector institutions that rely on them for a steady and growing supply of talented graduates.” The Consortium currently fulfills this student goal area of increasing student career success by collaborating across universities and with community partners to contribute to regional economic progress and prosperity. As articulated in the strategic plan, the three ways to achieve this goal are:

1. Create external partnerships within and across our three metro areas.
2. Engage employers to develop collective understanding of the value of the Consortium to meet their talent needs and address talent gaps.
3. Integrate market data and trends to influence and enhance educational practices.

The Consortium began to test approaches for career success collaboration from the Helmsley Trust-funded STEM grant several years ago. Partners explored connections between industry, teaching, and learning. However, those closest to the Helmsley work at each university remember it as most transformative in teaching practices for individual and small groups of faculty. Since then, the Consortium has sought additional ways to deepen its career work. Today, through its connections to the Florida Chamber of Commerce and other external partners, the Consortium is developing a powerful voice representing the state’s largest share of students in higher education, who contribute significantly to Florida’s economic and workforce development.

The Consortium is tracking student career success through employment retention and salary attainment metrics obtained through external data sources, including the Internal Revenue Service (IRS), National Student Clearinghouse (NSC), and State University System of Florida economic data. With limitations to soliciting information directly from students after graduation, the Consortium is integrating predictive analytics strategies to align emerging labor market trends with student pathway offerings at the three universities. It also tracks more descriptive indicators of the number of business and partner relationships, data analytic users, internships, and career experiences available, and convenings and summits around career success. The evaluation captured stakeholder experiences in absorbing field knowledge and adapting data analytics to university career strategies.



CAREER FINDINGS

The evaluation's project-based inquiry into the Consortium's work found career success outcomes are the least defined and most emergent. Efforts a year ago were on the cusp of greater momentum with a series of regional convenings planned at each campus when the COVID-19 pandemic slowed the work; partners and the state had to urgently refocus their priorities to ensure the health and safety of residents; job opportunities began to dissolve and unemployment rose. The Consortium staff and its external partners are considering a number of new and impactful ideas for designing equitable and impactful career success efforts for the post-pandemic era, when attention, resources, and momentum might materialize again.

For now, the Consortium is working with a set of career success stakeholders at partner universities to infuse data analytics into career success approaches. The current strategy is buoyed by the Consortium's external relationships with key workforce and economic partners in the field. Tactics can be summed up as two-fold:

- Through vendor relationships, shared platforms, and data (e.g., state/regional labor, market, and economic trends), the Consortium enables data-informed learning, experimentation, and practices to develop across university partners working in career services.
- Through field partners and external communications, the Consortium advocates for the learner-driven priorities of its university partners and demonstrates the power of the partnership to build upon regional and state economic development efforts.

"The latest thing we can now do is connect - not a program name or code – but actually to the skills being taught, course by course, program by program. It allows more granularity when talking with employers or current students, helping educators better align their courses with outcomes at the next level."

External Consortium Partner

Partners are learning to integrate data-informed career resources and workforce trends into their practices. The Consortium contributes to institutional goals by elevating effective use of data to serve the developmental and career outcomes of students. Stakeholders now have curriculum software to align with relevant labor market trends through Burning Glass Technologies and Emsi; and the ability to better match students with opportunities, such as internships and in-demand jobs, through common investments in the Handshake platform. By using a mutual set of data points and technologies, Consortium partners have the potential to advance learning and accelerate success at their home institutions. To date, career success stakeholders convene to learn about resources and share practices, which has yielded:

- Greater knowledge about available data and technology platforms to identify the right strategy for career services;
- Openly sharing successes, resources, and solutions across career services offices on three campuses;
- Connections with colleagues and outside vendors to help map and align curriculum, skill gains, and career readiness in some university college programs;



- Cross-campus STEM collaboration on career readiness, with a focus on building students' leadership, technology, and "soft" skills; and
- A planned event for supporting much-needed career networks among first generation students.

The Consortium is a key facilitator and data broker between faculty, career services staff, and field partners who want to design pathways toward high-demand areas. The Consortium staff size is not large enough to support day to day operations that ensure strong, ongoing connections between curriculum, classroom and experiential learning, and employers; however, the Executive Director "speaks the language" of the workforce and business sector, helping to identify and foster meaningful relationships with key external partners. With a robust orientation toward data, the Consortium's career success efforts offer university partners and the three metro regions opportunities to infuse data, evidence, and predictive analytics into career services work. In addition, the Consortium has become a visible advocate for underrepresented students (e.g., first generation, Latinx, adults) and more equitable economic, business, and workforce approaches statewide. The Executive Director is versatile and knowledgeable to engage with university staff involved in career success, as well as with external businesses and employers focused on broader trends in a region or statewide. This orientation encourages an informed approach for all Consortium stakeholders that is so critical for the complex, multi-layered work of career success efforts.

"The Consortium has the highest....probability of working with first-generation students to break the cycle of inter-generational poverty, helping get students and parents job skills and an educational degree."

External Consortium Partner

Vendor engagement and software cost sharing are key mechanisms of the Consortium's career success goal but may not be a unifying force across institutions.

The Consortium is leading conversations with the universities to use data more strategically and purchase the same systems to potentially reduce costs while learning together. However, these tactics are a just a segment of efforts needed to ensure career success for each university's students. How the Consortium is contributing to institutional and state career goals is difficult to capture. The impact of this work is complicated by the uniqueness of each university and the regional nature of career success, with employers in each university's region looking for curriculum and graduates with training tailored to local industry and workforce needs. The Consortium will benefit from a deep understanding of distinct career strategies and resource deployment at each university to ensure the collaborative work continues to be resonant.

There are concerns that the current career approach may face challenges, such as:

- Budgetary effects of the COVID-19 pandemic are forcing a review of spending that may impact vendor-driven strategies;
- The level of autonomy of career services staff varies across institutions, thus impacting the salience of tactics like purchasing shared platforms;



- Presidential priorities and leader/staff turnover require the Consortium to regularly revisit, reinforce, and “refresh” its approach with university leaders; or
- Career success efforts and career services engender a wide range of critical strategies that require a “bird’s eye” approach; the Consortium’s offerings are a narrow fit within these strategies and its value needs to be understood and resonant to university decision makers.

Table 2 represents the evaluation team’s expanded approach to track and understand the outcomes of the Consortium’s efforts to Increase Career Success. This is an evidence-based framework that draws from the strategic plan, current theory of change, and additional process and intermediate indicators captured in the evaluation. These new outcome areas reflect the “precursors” to student-level changes. The process and intermediate outcomes in which the Consortium has made the most progress are highlighted in green.

Table 2: Outcomes Framework: Increase Career Success through Data Analytics and Partnerships

Key Activities and Supports:	Process Outcomes:	Intermediate Outcomes:	Leading and Lagging Indicators:
Shared platforms for predictive workforce/career analytics, curricula alignment, and job and internship matching Workgroup meetings for career services personnel Draft metrics on alumni contributions to regional economy Workshops and convenings with major companies and university representatives	Partnership: <div style="border: 1px solid green; padding: 5px;"> <p>Shared knowledge of state economic modeling, careers, and labor market data, including equity-related trends</p> <p>Shared use of career services platform to enhance learning and effective strategies across partners</p> </div> Institutional: <div style="border: 1px solid green; padding: 5px;"> <p>Improved capacity for data-informed review of in-demand/marketable skills, academic programs, and curricula</p> </div> Field: Enhanced university-external relationships between universities and regional employers that can be leveraged for career success increases	Institutional: Administrators accountable for and achieving data-informed alignment between curricula and experiential opportunities with labor demands of each region and its employers New and specialized academic and experiential learning programs developed efficiently and innovatively at each institution to meet emerging labor needs and demand Greater collaboration between admissions, academic counseling and career services to steer students toward successful career pathways Consistent use of equitable and targeted strategies to build students’ networks, connections with faculty, and opportunities for internships that lead to careers with family-sustaining wages	<ul style="list-style-type: none"> • Number of external partners (small/medium businesses, nonprofits, K-12, other institutions) • Number of users of labor market data • Number of students participating in internships and work-based learning opportunities • Median wage for graduates 1-year post graduation • Percentage of students finding placement at salary of \$25K or more or postgraduate education • Percentage of metro population ages 25-64 with a bachelor’s degree or higher

“The Consortium seems to be supporting not only the strategic vision but the innovative vision of the three institutions and helping to convey the impact of those institutions on the state.”

External Consortium Partner



CONSIDERATIONS

It is complex work to holistically understand, evaluate, and communicate about an entity like the Florida Consortium of Metropolitan Research Universities. There is a consistent character to the Consortium's approach, yet it flexes in its role and activities to meet the moment. In a 2017 Stanford Social Innovation Review [article](#), Julie Battilana & Marissa Kimsey articulated three distinct roles played by those involved in social change that may reflect the variety of "hats" the Consortium plays across its projects and strategies – agitators, innovators, and orchestrators. Agitators help to craft and elevate narratives of those closest to an issue or problem. Innovators help develop new or evidence-informed solutions and communicate them in ways that create an organized movement. Orchestrators manage the change, cultivating ties with a diverse set of stakeholders and guiding efforts at all levels. Change requires all three be present.

The Consortium and its staff navigate all three roles to manage learner-centered change at its partner institutions and in local communities. It **acknowledges the hard-to-measure implicit and the explicit forces** that make change possible. Institutional and external partners both support and challenge the Consortium's approach; it is **situated in ecosystems with diverse incentive structures** that value both competition and collaboration, independence and interdependence, politics, and mission.

With the evaluation findings in hand, the Consortium is positioned to better understand its role in complex institutional and state-level change and refine its strategies to deepen impact. From the evaluation findings, we offer considerations in three key and interrelated areas: Learning, Communications, and Strategic Use of Data.

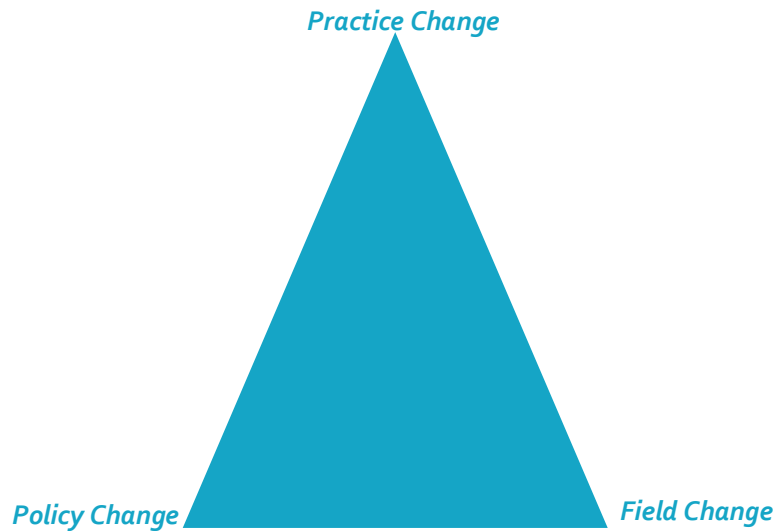
Learning and Communication Framework

In the project-based evaluation findings above, we offer "working" evaluation frameworks for the Consortium's two student outcome areas. They blend elements of an earlier theory of change and indicators from the current strategic plan, as well as highlight evidence of progress from the evaluation. These project-based frameworks help identify critical "precursors" (process and intermediate outcomes) to the student-level changes the Consortium aims to meet. They can support the Consortium's communications as well, highlighting the successes along the path to improving educational and career attainment indicators in Florida's major metro regions.

The outcomes frameworks are limited in their ability to convey a comprehensive message about impact to *all Consortium stakeholders*. They do not convey the Consortium's ability to rise to new opportunities and strategically deploy resources that meet emerging institutional and state goals. For consideration, we offer here a framework for learning that centers on **three enduring forms of change that the Consortium has reached or has potential to achieve** (see Figure 2).



Figure 2: Three forms of Consortium change efforts



In some cases, one form of change may be enough. More often, collaborative systems change work like the Consortium requires two or all three forms of change to reach and sustain the desired impact. We encourage the Consortium leaders to determine the *form of change* it seeks to create with each project; this will allow the Consortium to better communicate with clear purpose and will guide stakeholders involved in the work to identify appropriate tactics, track their progress toward the right form of change, and know when they have reached the desired outcome.

"[We] haven't really done the work of closing the assessment loop [on Teaching and Learning]. I don't know that we've had a rigorous reflection on this moment, until your question came 30 seconds ago. So, shame on us to some extent, because we talk about this with our faculty and didn't necessarily implement it ourselves in this case."

Internal Consortium Partner



Below in Table 3, we summarize the features of each form of change and provide implications for future learning and evaluation.

Table 3: Summary of Three Forms of Consortium Change

	<i>Practice Change</i>	<i>Policy Change</i>	<i>Field Change</i>
<i>Structure</i>	<ul style="list-style-type: none"> • Begins with a focus on building participant trust, relationships, and vulnerability • Identify common issues • Exchange ideas, materials, and lessons learned • Pilot and refine for individual or team practice 	<ul style="list-style-type: none"> • Requires involvement of institutional leaders to change or amend internal policies • Time dedicated to understanding current policies, student and institutional data, and best practices in the field • Institutional decision makers are lockstep with departmental directors and staff, responsible for implementation • Involve student-facing staff and students to ensure learner-centered and equitable policies 	<ul style="list-style-type: none"> • Entails building relationships with a range of partners, orchestrating complex change • Blend of intermediary, thought leadership, and thought partnership approaches • Tends to require a broad vision that is “fuzzy” enough at the edges to accommodate a range of partner priorities and styles • Addresses time-intensive implicit factors, such as individual’s mindsets and implicit biases, relationships, and power
<i>Evaluation</i>	<ul style="list-style-type: none"> • Establish shared outcomes and learning objectives • Develop methods to track and promote progress at individual, departmental and institutional levels • Focus on continuous learning and sustainability; student outcomes will be delayed 	<ul style="list-style-type: none"> • Track outputs (delivery of policy) and perceptions (of staff, student) to understand variations and reception • Learning centered evaluation will help drive refinements in implementation before measuring impact 	<ul style="list-style-type: none"> • Measures include impact on individuals, institutions, and cross-sector partners • Developmental eval ideal for early capture of change: establishing trust, relationships, and working agreements among partners • Social network mapping and case studies help to distill the complexity of field change approaches • Successes are not “attributable” to a single partner or effort



<p>Sustain-ability Strategies</p>	<ul style="list-style-type: none"> • Knowledge management system to establish practices for continued implementation • Buy in and support from departmental and high-level decision makers • Continued access to resources and funding • Establish a community of practice for participants and orientation for new faculty/staff 	<ul style="list-style-type: none"> • Passage or approval of an institutional policy • MOU's, articulation agreements, and/or pathway maps • Education and training for directors and staff • Communities of practice within/across institutions • Budgets and resources that reflect the policy change and the "true cost" of implementation • Automation where possible to ensure equitable and consistent implementation across students 	<ul style="list-style-type: none"> • Strong partnerships with engaged leaders capable of leading and financially supporting efforts • Democratic access to data to understand issues, track change, and develop strategies at a high level • Relationships with advocates and community-based organizations to ensure field level changes align with current efforts, local priorities, and identified community leaders
<p>Drawbacks</p>	<p>Practice change alone is hard to sustain.</p> <ul style="list-style-type: none"> • Without a grassroots movement and momentum building, the work can dissipate • Complementary policy change and budget reallocations are necessary to maintain beyond "ripple effect" 	<p>Development of institutional policy change takes time, as does the appropriate training, resource allocation, and refinement in implementation needed after a policy is approved</p>	<p>Buy in and reallocation of resources across partners is a continuous effort and outcomes often emergent; can be slowed unexpectedly by politics, urgent crises, etc.</p>
<p>Example</p>	<p>The Helmsley-funded Teaching and Learning grant led to practice changes among faculty members who attended and led sessions on active learning and culturally responsive teaching methods. Participants met over the course of three years, with increasing numbers of attendees and collaborative presentations. The opportunity elevated the importance of pedagogy, thus inspiring experimentation, continued learning, and ongoing cross-institutional relationships.</p>	<p>The ongoing Transfer Success work of the Consortium responds to the upcoming state metric by beginning to establish individual and cross-campus policies that ensure persistence and degree attainment for transfer students. The new metric has drawn necessary attention and supports from the university presidents and leaders to transfer success departments, and ultimately to transfer students who are more diverse in terms of age, life stage, experience, and life/education/work demands than freshman beginning their journey at a four-year institution.</p>	<p>The Consortium is a liaison and dot-connector between the institutions and external partners seeking to advance career success for Florida's students and enhance economic well-being. This work ultimately seeks interdependence among the ecosystems of business, higher education, and workforce development to better serve students along the access-persistence-attainment-career continuum.</p>



COMMUNICATIONS

The evaluation found that university and external stakeholders have an improved understanding of the Consortium since its early years, and those involved in working groups and convenings see how the partnership aids their campus efforts toward student success and meeting state benchmarks. The Consortium's efforts to tailor messages to different audiences are working well.

However, few stakeholders have a holistic understanding of the Consortium's value, absent talking about one of its projects. The Consortium would benefit from a "refresh" of its branding efforts to help all stakeholders understand not just what it does (which is often tied to projects of the moment), but how it works and its future-facing role in learner-focused improvements across campuses. We offer here three potential tactics to rebranding drawn on the evaluation's findings and considerations.

1. **Focus on Fluidity.** First is communicating that the Consortium is positioned to facilitate collaborative institutional change on **emerging issues critical to student success**. The projects the Consortium lead do not always fit neatly into Student Achievement and Student Success goals or institution's long-term metrics; in fact, the projects and goal areas feature quite a bit of overlap. The fact that the Consortium staff was tapped to lead the Year of Reflection work, distribute emergency completion grants for students in 2020, and develop the Helmsley grant work several years ago speaks to the generalist and adaptable nature of the Consortium. The Consortium has a stable and effective set of methods to support collaboration, best practices, and experimentation that lead to policy and practice changes at its three institutions. Anchoring in this type of message authorizes the Consortium to appropriately shrink its accountability to student outcomes, on which it has limited and indirect influence.
2. **Focus on Change.** Second, the change framework above could potentially provide a common vision for the forms of change and transformation possible through the Consortium. Using the change framework in messaging about project work acknowledges for university leaders and stakeholders the kinds of change that the project is intended to produce and signals early on the resources that will be needed to sustain the change. This will also help the Consortium, its funders, and partners measure practice, policy, and/or field change efforts accordingly. As an umbrella for the brand, the framework offers all stakeholders clear and simple language about the Consortium's three forms of change, encapsulating all current priorities and funding opportunities and future ones as well.
3. **Focus on Values.** Third, the Consortium staff creates an atmosphere of learning, vulnerability, collaboration, and thoughtful sequencing that is rarely found in higher education. We suggest branding include a succinct and strong set of messages about the Consortium's values, including its signature "ways of working." In addition, the Consortium's intentional focus on elevating success for Latinx, first generation, adults, transfer and limited income students will be important to continue in its messaging.

External partners voiced some uncertainty around the Consortium's values related to the power dynamic the partnership may have inadvertently created. For example, the partnership of the three institutions under the umbrella of the Consortium may hold greater weight and better access to resources than individual institutions in the state, complicating the distribution of power across the system even further than before its founding.



An important counterpoint to this view is the Consortium’s transfer success approach, which is open to all transfer service professionals statewide. This style of engagement **demonstrates a commitment to widespread success for all Florida students and encourages interrelated systems (such as state colleges and four-year institutions) to partner to eradicate barriers facing first generation, limited income, and adult transfer students**. Another idea is to provide curated, concise, and user-friendly tools and resources on the Consortium website and platforms. The videos from the Teaching and Learning work represent a strong start, although they require some “insider” knowledge to navigate well. A guided, learner-centric approach to sharing material online with the field would go a long way in demonstrating Consortium values, acknowledging power, and enhancing transparency.

STRATEGIC DATA USE

The Consortium has made significant strides in aligning data indicators across the three university partners. Its capacity to determine common indicators, align definitions, develop sharing agreements, and create a process for seamless collection, analysis, and use is very impressive. Consortium stakeholders take pride in their success with data. However, internal and external stakeholders would benefit from more strategic and grounded use of data. We offer here considerations for building capacity and using data more pointedly to advance the Consortium’s complex work, especially its project-based efforts.

Like the Consortium, partnerships engaged in postsecondary and career success efforts use data for three key purposes:

1. Set priorities for **policy and practice change** that sustains their work and measuring progress
2. Monitor the partnership’s internal structures and processes for **continuous improvement**
3. Build **public commitment** and awareness of their agenda

For each purpose, the type of data and the tools to communicate and use data will vary, as suggested below in Table 4:



Table 4: Strategic Data Use

	Policy and Practice Change	Continuous Improvement	Public Commitment
Types of data	Course success rates, disaggregated persistence rates, transfer student pathway progress, academic performance, automation data	Partner perceptions of roles and responsibilities, transparency, efficacy of processes	Institutional or public data on enrollment, graduation, job retention
Types of tools	Facilitated inquiry process, evaluation, reflection sessions	Admin process review, environmental scan, evaluation	Report cards, dashboards, indicator reports

There is an opportunity for the Consortium to sharpen its use of data in ways that will resonate with internal and external stakeholders and **develop intermediate markers of progress that are formatively useful as the Consortium’s institutions progress toward big student-focused goals**. A Consortium data committee is one way to build capacity and develop data-informed stories for a range of audiences. Data committees often require a range of talents that are likely already present in the three partner institutions and engaged with the Consortium:

- **Manager** to put in place the structures, workplans, and responsibilities that will guide the data work and solidify trust among partners.
- **Analytical thinkers** who help the partnership hone strategic questions about students, postsecondary partners, and the factors influencing patterns.
- **Researchers** who have facility in cleaning, matching, running, and troubleshooting data definitions and analyses. It is important to include qualitative researchers and ethnographers who make greater meaning of interviews, focus groups, and contextual factors.
- **Facilitators** who can lead meaningful conversations to help partners understand the implications of the data and brainstorm solutions. Facilitators can also engage students and staff in co-interpretation.
- **Visual presenters** and artists who can present data findings graphically, numerically, and verbally in the most compelling and clear way.
- **Communicators** who can present the data and its implications to a variety of stakeholders, executives, and operational partners.



APPENDIX A. ABOUT THE FLORIDA CONSORTIUM OF METROPOLITAN UNIVERSITIES

The Florida Consortium of Metropolitan Universities is a network of staff and faculty between the three largest metropolitan research universities in the state of Florida: Florida International University (FIU) in Miami, University of Central Florida (UCF) in Orlando, and University of South Florida (USF) in Tampa Bay. The Consortium is managed at UCF by a small team led by Executive Director Michael Preston. He meets weekly with an Operational Lead (OL) from each university, quarterly with the Presidents Council (each of the three university Presidents) and senior leaders of the Helios Education Foundation, the Consortium's primary funder.

The overarching goal of the Consortium is to integrate each institution's efforts in meaningful ways and accelerate the pace and extent of change by sharing, learning, and applying best practices, policies, and program designs. Since its founding in 2013, the Consortium has served as a convener, strategist, and storyteller for strengthening teaching and learning, increasing student persistence and graduation rates, aligning labor market trends with curriculum and career services, and bolstering the voice and status of first generation and minoritized populations in Florida.

The Consortium adopted a Strategic Plan in 2019, five years since its inception and is looking forward to the next five years. The core tenets of the Strategic Plan that this evaluation examines are: 1) **accelerate student achievement**, 2) **increase student success in the metro areas**, and 3) **foster conditions to advance success with internal and external stakeholders**. In 2020, a year of tremendous public health, economic, and racial injustices, the Consortium united all three institutions in a Year of Reflection to provide space for reflection, conversation, self-examination, and action to improve institutional conditions for minoritized students and faculty.

Our evaluation is grounded in the Strategic Plan elements and the Consortium's DEI approaches. Our findings reflect the Consortium's strengths and opportunities in advancing these student and institutional outcomes. The Consortium is operating in a unique time in Florida's history, where universities are experiencing major enrollment and budget declines due to the detriments of the COVID-19 pandemic, yet state political and economic leaders view Florida as one of the top 10 leading economies in the world. The Consortium, representing the largest proportion of students—many first generation, diverse, and from the state's three largest economic hub—has the power and opportunity to bridge the interests of the academic community with that of the business and political communities. Its unity, adaptability, and flexibility are qualities that can be leveraged to achieve large scale student outcomes that will positively affect the state's trajectory.

On the following page is the state-wide context the Consortium operates in to advance collective interests among the three universities, while preserving individual identity and relevant strategies and approaches. It outlines the Consortium's capacities that enable it to support the initiatives.



The Florida Consortium of Metropolitan Universities Current Context of Operations

Capacities for Success

- Visionary and Adaptable Leadership
- Commitment to Equity and Inclusion
- Bridging Stakeholders Across Universities through Culture of Partnership
- Navigation of Unique Bureaucracies and Administrative Procedures
- Building Capacity of Labor Market Data to Inform Decisions on Academic Programming



ORLANDO

- High growth with a lot of industries and skill alignment with higher ed institutions
- Special interest coaching for students of color, first generation.

USF TAMPA

- Growing quickly in industries outside of service and tourism
- National awards for closing achievement gaps

FIU MIAMI

- Diversifying economy to move beyond service and tourism industries
- Advisors to work specifically with many of its transfers

Florida State Conditions

Outcome Areas	Context	Role of Consortium
Accelerate Student Achievement	Transfer Success Metric to be introduced in Performance-Based Funding in 2021-2022 (Consortium members comprise 68% of transfer students)	Consortium facilitates members to work together to support transfer students and success initiatives through convenings and working groups
Increase Student Career Success	Florida aiming to be top 10 economies in the world by 2030, aligned with 60% of adults with a credential/degree	Consortium understands how labor market data aligns with university programming and career pathway design; integrates skillsets into curricula and syllabi
Foster Conditions to Advance Success	Consortium universities are a powerful coalition to compete against larger state universities and to attract large-scale philanthropy throughout the state	Consortium creates a "safe space" and a culture that values partnerships to advance common agenda and leverage funding, resources, and learning
Equity	Consortium universities comprise over 70% of state student population, mostly minoritized, first-generation, and low-income status	Consortium is a voice for student supports, needs, and outcomes; it unites all three universities in shared learning and conversations around racial and social justice.



APPENDIX B: EVALUATION'S PROJECT-BASED SOURCES

To understand the Consortium's outcomes and progress in the three goal areas, the evaluation team focused on six project-based initiatives in its data collection and analysis. Through interviews, focus groups, and document review, this table illustrates our current understanding of how each project area contributes to the Consortium's goals.

Project-based Initiative	Description	Accelerate Student Achievement	Increase Career Success	Fostering Conditions for Success
Transfer success	<i>2019-present</i> Research and policies for statewide metric. <ul style="list-style-type: none"> University-funded 	✓		✓
Data Analytics	<i>2018-present</i> Shared platforms on labor market needs and trends <ul style="list-style-type: none"> University-funded 		✓	✓
Communications and External Partnerships	<i>Ongoing</i> Information broker with external partners <ul style="list-style-type: none"> University-funded/Helios 	✓	✓	✓
Teaching and Learning	<i>2016-2019</i> STEM teaching and college to career success <ul style="list-style-type: none"> Helmsley grant 	✓		✓
Summer completion grants	<i>2020</i> Emergency assistance for limited-income students <ul style="list-style-type: none"> Helios grant 	✓		
Year of Reflection	<i>2020-2021</i> Social justice, diversity, equity, and inclusion programming <ul style="list-style-type: none"> University-funded 			✓



APPENDIX C. SUMMARY OF METHODS

Discovery Phase Interviews. In fall 2020, the Equal Measure team interviewed members of the Consortium staff and senior staff of the Helios Education Foundation to explore the Consortium’s perspective on its work, leadership, progress, and approaches in the field. We will examine accelerants, barriers, and opportunities related to strategic progress, including how efforts have been shaped by the COVID-19 pandemic.

Discovery Phase Focus Group. In fall 2020, we hosted two focus groups with Operational Leads and student support services staff, one with representatives from UCF and FIU, another with those from USF. In the focus groups, we documented partners’ perceptions of the Consortium and its impact on their schools. The focus group is also an opportunity to understand how the Consortium’s work aligns with the broader activities and priorities of campus efforts and identify additional sources of information for the evaluation.

Evaluation University Stakeholder Interviews. In winter 2020, we interviewed directors, managers, faculty, and staff who have worked with or participated in Consortium events and activities. Through these interviews, we documented the effect of Consortium activities on learning, mindsets, behavior change, and policies. We collected data and perspectives about the Consortium’s process strategies, including how the Consortium uses those strategies to align and coordinate learning, research, and development; foster innovation; conduct timely and relevant conversations with stakeholders; and produce impactful products and communications.

Evaluation Phase Focus Groups. In winter 2020, we conducted three focus groups to further document progress on the key strategies, including how efforts foster collaboration, support best practices implementation and innovation, and address challenges within and across institutions. These focus groups provided an in-depth range of perspective on how the Consortium’s work translates in university settings and where additional supports, leadership, and resources are necessary.

Evaluation External Interviews. In winter 2020, we interviewed external partners to further our understanding of the Consortium’s role and alignment with ongoing talent, workforce, and career efforts; how it engages with and creates partnerships across the three target regions; how it demonstrates its value proposition to address talent needs and gaps; and its influence on the mindsets and actions of decision-makers and organizations.

Document Review. Throughout the evaluation, we conducted a thorough review of Consortium documents, such as the strategic plan, internal briefings, data, and artifacts from convenings and meetings. This review will help us understand the priorities of the Consortium and its partners, begin to build a picture of how the work unfolds and collaboration happens, and assess gaps in knowledge that we can pursue through other data collection methods.

About Equal Measure

Equal Measure is a Philadelphia-based nonprofit consultancy working with national and regional foundations, nonprofits, and public entities to advance social change. Equal Measure offers program design, evaluation through a wide range of methodologies, capacity building, technical assistance, and communications services to help those who do good, do even better. For more than 30 years, we’ve partnered with clients across a broad spectrum of content areas, sharing fresh insights and translating good ideas into meaningful change—strengthening our clients’ efforts to make our communities healthier, more equitable, and more inclusive.



APPENDIX D. LIST OF INTERVIEWEES

- 1) **Abbey Ivey**, Director, Florida Student Success Center
- 2) **Ann Marie Palmer**, Associate Director, Summer Care Services, University of Central Florida
- 3) **Bill Cummings**, Associate Vice President Strategic Initiatives, University of South Florida
- 4) **Braulio Colon**, Vice President, Florida Student Success Initiatives, Helios Education Foundation
- 5) **Bridgette Cram**, Assistant Vice President for Academic and Student Affairs, Florida International University
- 6) **Doug Heckman**, Senior Account Executive, EMSI Data Analytics
- 7) **Elizabeth Behar**, Vice President of Academic and Student Affairs, Florida International University
- 8) **El pagnier Kay Hudson**, Senior Vice President, Human Resources; Vice Provost for Diversity, Equity, and Inclusion, Florida International University
- 9) **Fai Howard**, Assistant Dean for Upper-Level Initiatives, University South Florida
- 10) **Glen Dawes**, Associate Vice President and Chief Financial Officer for Advancement, University of Central Florida
- 11) **Janie Valdes**, Assistant Vice President, Enrollment Management and Services, Florida International University
- 12) **Jennifer Bravo**, Director, Transfer and Transition Services, Florida International University
- 13) **Jerry Parrish**, Chief Economist and Director of Research, Florida Chamber Foundation
- 14) **Karen Lenz Pagel**, Accounting Specialist, University of Central Florida
- 15) **Kathy McDonald**, Assistant Director for Network Partnerships, Florida College Access Network
- 16) **Katie Burke**, Executive Director, New Student Transitions and Family Engagement, Florida Atlantic University
- 17) **Kevin Yee**, Assistant Dean, Teaching and Learning, University of South Florida
- 18) **LaToya Hodge**, Assistant Director of Communication and Strategy, Florida Consortium of Metropolitan Universities
- 19) **Leanne Wells**, Senior Director, Center for the Advancement of Learning, Florida International University
- 20) **Linda Sullivan**, Assistant Vice President and SUS Institutional Data Administrator, University of Central Florida
- 21) **Lori Shuff**, Assistant Vice President, Corporate and Foundation Relations, University of Central Florida
- 22) **Lynn Chisholm**, Director of Internships and Career Readiness, University of South Florida
- 23) **Marcia Munroe**, Assistant Director, Budget and Reporting, University of Central Florida
- 24) **Maribeth Ehasz**, Vice President for Student Development and Enrollment Services, University of Central Florida
- 25) **Melissa Dagley**, Executive Director, iSTEM Center, University of Central Florida
- 26) **Melody Bowdon**, Associate Vice-Provost of Academic Administration, Division of Student Learning and Academic Success, University of Central Florida
- 27) **Michael Preston**, Executive Director, Florida Consortium of Metropolitan Universities
- 28) **Pam Cavanaugh**, Associate Vice President, UCF Connect
- 29) **Paul Dosal**, Vice President of Student Affairs and Student Success, University of South Florida
- 30) **Paul Perrault**, Vice President, Research and Evaluation, Helios Education Foundation
- 31) **Ted Greenberg**, Research Writer, Florida Consortium of Metropolitan Universities
- 32) **Valeria Garcia**, Associate Vice President, Office of Decision Support