



**FLORIDA  
CONSORTIUM**  
OF METROPOLITAN  
RESEARCH UNIVERSITIES

# **2023 EXTERNAL EVALUATION REPORT**

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## Executive Summary

This evaluation report summarizes the Florida Consortium of Metropolitan Research University (Florida consortium) goals, activities, and accomplishments for the 2022-23 fiscal year, featuring the Coaching Academy, led by UCF; transfer coaching and student scholarships, awarded by FIU; and the comprehensive for Articulation Platform Technology (APT), led by USF. In addition, a survey is conducted of representatives of the three partner universities who are knowledgeable of the Consortium's work. The following observations begin with key findings from the Network Leadership Survey and proceed to observations and lessons learned from evaluation of the three other Consortium activities featured in this report.

### The Network Leadership Survey

- ⇒ Respondents give high marks to the overall accomplishments of the Florida Consortium, providing an overall average rating for accomplishments at 8.6 out of 10.0
- ⇒ Respondents perceived that the Florida Consortium is making good progress on accomplishing goals and process strategies prioritized in the *2019-2023 Strategic Plan*, and on implementing recommendations from the *2021 Equal Measures Evaluation* report.
- ⇒ Some variability was observed in some process strategies and recommendations that may be useful to examine more thoroughly, including writing-up results; ensuring adequate resources for university efforts to improve success, especially due to the very large number of transfer students attending these school; and signaling to university leaders the ambitious vision of the Florida Consortium and the importance of what it is seeks to accomplish to enhance college student success.
- ⇒ These survey results should be analyzed further for additional insights into how best to integrate, align and grow positive change in transfer policies and processes through the Florida Consortium, partners and other entities seeking to improve college student success throughout the state.

### The UCF Higher Education Coaching Academy's Consortium's Coaching Collaborative

- ⇒ The *Consortium's Coaching Collaborative* has experienced a high level of success in its first year and is continuing to grow and engage more employees of the three partner universities, as well as FCS partner colleges. The potential to grow and deepen engagement and impact is very promising under the committed and enthusiastic leadership of Dr. Pam Cavanaugh and Dr. Jennifer Sumner at UCF.
- ⇒ Results of surveys conducted immediately after coaching training demonstrate a high level of satisfaction and learning about higher education coaching, as well as in how the practice of coaching should operate in the higher education context. The preponderance of participants in the coaching training perceive they are well prepared to engage in coaching and that their practice will have a positive impact on students. Follow-up surveys conducted with participants confirm perceptions track well with the coaches'

actual experience coaching students, including students feeling empowered, capable of achieving their goals, and taking accountability for their actions.

- ⇒ Plans for future coach training led by UCF are ambitious, including hosting three courses/sections for Fall 2023, developing follow-up cohort reunions where past participants can showcase how they are using their newly acquired coaching skills, and engaging with other Florida Consortium universities and partners to learn, share data on impact, and grow higher education coaching statewide, and possibly also beyond the state of Florida.

### **FIU's Transfer Coaching and Student Scholarships**

- ⇒ An initiative directly related to UCF's *Consortium's Coaching Collaborative* is transfer coaching and student scholarships at FIU. Aligning FIU's transfer efforts with the *Collaborative*, FIU established a transfer coaching process that is engaging over 100 transfer students per term (based on spring 2023 data). Thus far, 23 transfer students have been awarded scholarships to provide the financial support transfer students nearly completion need to graduate in a timely and academically successful way.
- ⇒ FIU students who participate in transfer coaching and receive student scholarships are a diverse group of learners. The average cumulative GPAs of the scholarship recipients is 3.21 out of 4.0 and 3.09 out of 4.0 for students receiving transfer coaching only. The academic programs pursued by these students are most prevalent in Arts, Sciences and Education and Business Administration. Also, Pell recipients make up a sizeable proportion of both groups, especially those receiving transfer coaching only.
- ⇒ Internal and external partners play a critical role in the implementation of transfer coaching, including collaborative engagement with Florida Consortium partners UCF and USF.

### **The Articulation Platform Technology (APT)**

- ⇒ The work on APT is multi-faceted, including USF's leadership role in to provide contracting and supervising the design and develop new articulation and transfer technology. To facilitate this effort, the Florida Consortium hosted the APT Symposium in January 2023, including all three university partners, as well as the FCS state leader of articulation and transfer. Collectively, this meeting provided the opportunity to bring teams from each campus together to share critical information about how transfer works on their campuses and engage in collaborative dialogue about how transfer can be reformed to be more effective and efficient.
- ⇒ Results of a survey of APT Symposium participants show favorable perceptions about the value of the meeting, particularly information shared about how course equivalency processes work within and across campuses. The roles faculty and staff play now and how these groups can contribute more productively in the future was also discussed.
- ⇒ University visits were conducted by a delegation of the Florida Consortium, providing the opportunity for campus leaders to learn how transfer policies, processes and

technologies work at Arizona State University, University of Arizona, and University of Kentucky. Lessons learned about articulation and transfer technology used on these campuses, including how this technology was developed and implemented, was an important finding of the group. Also of note was learnings about how the size of transfer student enrollment impacts campus resources and practices that, in turn, affects student success outcomes. This finding has the potential to fuel additional dialogue about transfer improvement options that are possible on university campuses given available resources available to meet student transfer need. The ability to successfully implement APT and other reforms will necessarily depend, at least in part, on campuses having adequate resources to employ innovations intended to enhance student success.

### **Last Thoughts**

The Florida Consortium of Metropolitan Research Universities has demonstrated a strong commitment to achieving its goals over the past year when this evaluation was conducted. The partner universities are well engaged in numerous process strategies and initiatives illustrated by the UCF Higher Education Coaching Academy *Consortium's Coaching Collaborative*, the FIU transfer coaching and student scholarships, and the Articulation Platform Technology (APT). Other initiatives such as the annual *Summit on Accelerating Transfer Success*; recognition of advancements in transfer policies and practices on each campus, including UCF's collaborative work with Valencia College's business programs; efforts to improve connections to careers; strategies to improve transfer experiences for adult learners; and others will be the focus of future annual evaluations. For now, the Consortium is encouraged to continue building momentum by advancing what's going well and strategically addressing opportunities to improve and scale positive change to improve student success in the state of Florida.

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## Introduction

This first annual evaluation report focuses on the Florida Consortium of Metropolitan Research Universities, referred to as the Florida Consortium and simply the Consortium throughout this report. The three research universities that form the backbone of the Florida Consortium are Florida International University (FIU), University of Central Florida (UCF), and University of South Florida (USF). In addition, 16 colleges that are part of the Florida College System (FCS) are partner colleges in the Consortium.

This report summarizes the Florida Consortium's goals, activities, and accomplishments for the 2022-23 fiscal year, featuring the Coaching Academy led by UCF, transfer coaching and student scholarships awarded by FIU, and the comprehensive solicitation and decision-making process for the new Articulation Platform Technology (APT), led by USF. These activities are evaluated because they are important areas of work during the 2022-23 but they are by no means the only areas of work that could be studied. The Consortium plays an increasingly important role in advancing transfer student success in the state, including conducting the annual Florida Summit on Accelerating Transfer Success<sup>1</sup> and collaborative efforts to improve transfer outcomes for students matriculating from FCS institutions to the three metropolitan universities in specific disciplines, such as the partnership to improve on-time completion for business students matriculating from Valencia College to UCF. These initiatives and others will be the focus of future annual reports a comprehensive picture of the Consortium's accomplishments will be created and shared.

This evaluation was conducted by Debra Bragg, Ph.D. President of Bragg & Associates, who specializes in higher education and community college research and evaluation.<sup>2</sup>

## The Evaluation

The overarching question guiding the evaluation of the Florida Consortium of Metropolitan Research Universities is:

*How do the strategies and solutions planned and implemented by the Florida Consortium of Metropolitan Research Universities influence transfer student success in Florida?*

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<sup>1</sup> The 2023 Florida Summit on Accelerating Transfer Success will be held on Monday, November 6, 2023, at the Marshall Student Center on the campus of the University of South Florida in Tampa.

<sup>2</sup> Debra Bragg is an experienced researcher who is also conducting an external evaluation of the Florida College System (FCS) Student Success Center concurrent with this evaluation of the Florida Consortium. Her portfolio includes projects funded by ECMC, the Joyce Foundation, the Strada Education Network, and numerous studies for the National Science Foundation (NSF). She is also actively evaluating the student success centers in Arizona and Washington state.

#### Sub-questions:

- What strategies are employed by the FL Consortium leadership to support and guide the Florida Transfer Success Network?
- What solutions are implemented by the three universities (FIU, UCF and USF) and Florida State College (FCS) partners, and how has implementation evolved over the last year?
- What quantitative and qualitative data are gathered, analyzed, and reported on the primary solutions, and what improvements are being made based on these results?
- What stories do Consortium members tell to illustrate, inform and shape current and future collaborations?

Primary sources of data for this mixed methods evaluation come from the Florida Consortium's three research university partners, including documents, materials and data shared with the evaluator by employees of these universities. In addition, interviews and participant observation notes created by the evaluator are another primary source of qualitative data. Additional quantitative data were shared with the evaluator by the Florida Consortium leadership, including data derived from datasets maintained by the state or institutions as well as surveys conducted by the partner institutions.

Specifically, the data collection for this evaluation included review and analysis of Florida Consortium documents, data and social media available through:

- FL Consortium website at: [floridaconsortium.com](http://floridaconsortium.com)
- FL Consortium annual reports (2015-16 through 2022) and Strategic Plan for 2019-2023
- Prior Consortium evaluation reports by *Equal Measure* (2021)
- Transfer data files (forwarded to D. Bragg from M. Preston on Dec 8, 2022)
- Participation and observation of regular consortium zoom meetings (August 2022-June 2023)
- Survey of Consortium leadership (May-June 2023)

In May and June 2023, an online survey was designed by the evaluator and distributed to XX individuals identified as leaders and/or active participants in the Florida Consortium. The survey built upon the Florida Consortium's Strategic Plan for 2019-2023, as well as earlier results published by *Equal Measures* (2021). A draft of the survey instrument was shared with the Florida Consortium leadership as well as a key research member of the consortium to obtain feedback and integrate improvements. The invitation to return the online survey was forwarded by Dr. Michael Preston, Director of the Florida Consortium on May 24, 2023, with instructions to submit responses by June 2, 2023. This deadline was extended to capitalize on a Consortium meeting where several individuals who had been invited to take the survey were invited again to submit responses by Friday, June 16.

In addition, the evaluator reviewed and analyzed data on the Consortium Coaching Academy (led by UCF), the transfer coaching and student scholarships awarded by FIU (led by FIU), and the planning and solicitation process for the Articulation Platform Technology (APT) (USF), including survey results on the Florida Consortium APT Symposium. Research conducted by the university partners is referenced in this report to appropriately credit the work and clarify roles and resulting information included in this report.

## Results

This year's findings are organized as follows:

1. The Network Leadership Survey
2. The Consortium's Coaching Academy
3. FIU's Transfer Coaching and Student Scholarships
4. The Articulation Platform Technology (APT) Planning and Solicitation Process

### 1. The Network Leadership Survey

The purpose of the online Consortium Network Leadership Survey was to reconnect employees of the three metropolitan research universities (FIU, UCF, USF), with "good working knowledge of the Consortium" that would enable their assessment of:

- perceptions of how five goals established in the [\*Strategic Plan \(2019-2023\)\*](#) are progressing, and
- perceptions of how six process strategies and seven recommendations included in the [\*Equal Measures evaluation report \(2021\)\*](#) are contributing to the Consortium's impact on student success.

To gather the survey data, an online questionnaire was created and distributed in late May through early June 2023 using SurveyMonkey. The instrument included scaled and open-ended items related to Consortium's *Strategic Plan* and the *Equal Measure* reports (links provided above). These two reports present the vision and mission of the Consortium as well as detailed plans and commentary on what the Consortium seeks to achieve through a shared agenda with three metropolitan research university partners (FIU, UCF and USF) and 16 institutions affiliated with the Florida College System (FCS) to enhance the student success of Florida college students, particularly students who aspire to transfer and who actively engage in the transfer process.

The target sample for this online survey was 16 employees of the three research universities who were thought to have a "good working knowledge" of the Consortium. On May 24, a link was e-mailed by Michael Preston, Executive Director of the Florida Consortium, with several reminders from Scott Mauro, Associate Director of Strategy and Communications, to encourage timely response. Six surveys were received in response, with a 38% response rate. On Friday, June 12st, the Consortium held a zoom meeting involving several members of the survey



sample, and this group was reminded to respond to the survey if they had not already done so. Four additional surveys were received, increasing the response rate to 63%. The week of June 12<sup>th</sup>, additional reminders were sent to non-respondents to encourage their participation, with the final date for data included in this report being Wednesday, June 14<sup>th</sup>.

As of June 12, 2023, a total of 12 respondents (75%) had completed the survey, with 2 respondents from FIU and 5 each from UCF and USF. Results of the survey suggest a positive perception of the Consortium’s efforts to meet the overarching goal of enhancing student success, with an **average rating of 8.6 on a 10-point scale**. This rating indicates strong support for the overall direction the Consortium is taking to implement its strategic goals to enhance student success.

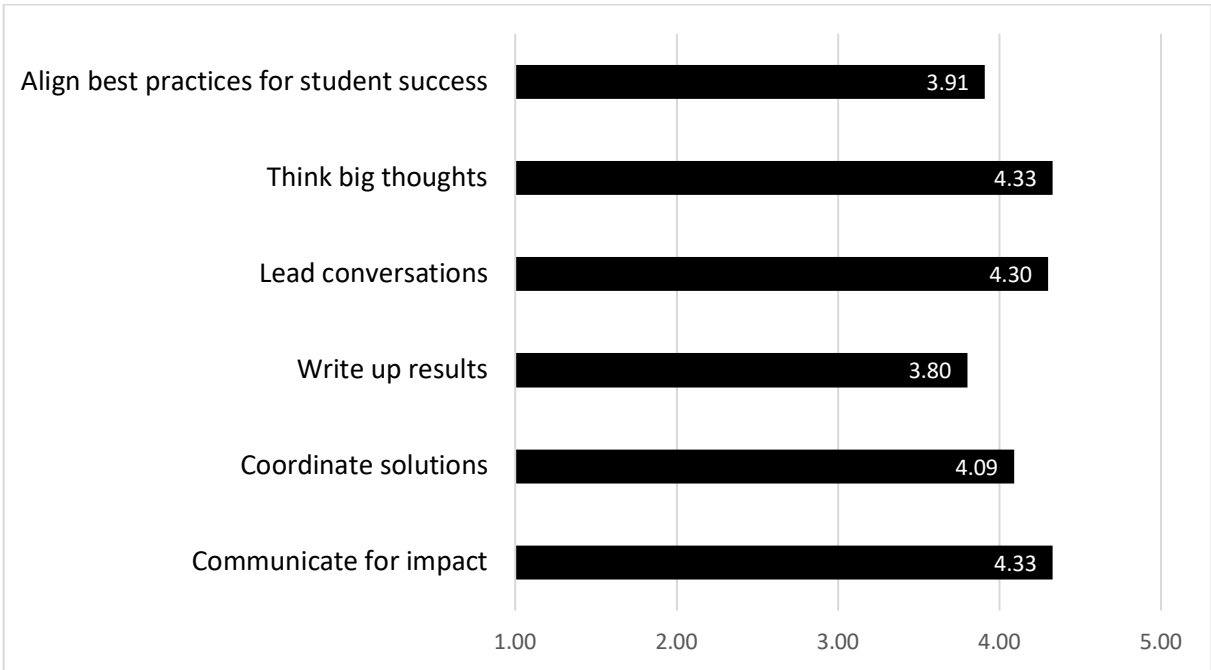
The survey also asked respondents to rate the progress the Florida Consortium is making to implement five goals articulated in the Consortium’s Strategic Plan. The scale for assessing progress utilized 5 points, extending from No Progress At All (1) to Exceptional Progress (5). Between 9 to 12 respondents rated each of the item, with 1-3 respondents indicating they did not have enough information to respond to one or more of the items. For those who rated the five goals, the average rating ranged from 4.11 to 4.64. Goal 4 to **“operate with excellence”** had the highest average rating and Goal 1 to **“foster conditions to advance success”** received the lowest average rating. No goal was rated at the No Progress At All or Some Progress levels by any respondents (see Figure 1).

Figure 1. Respondent Average Ratings on Five Strategic Goals



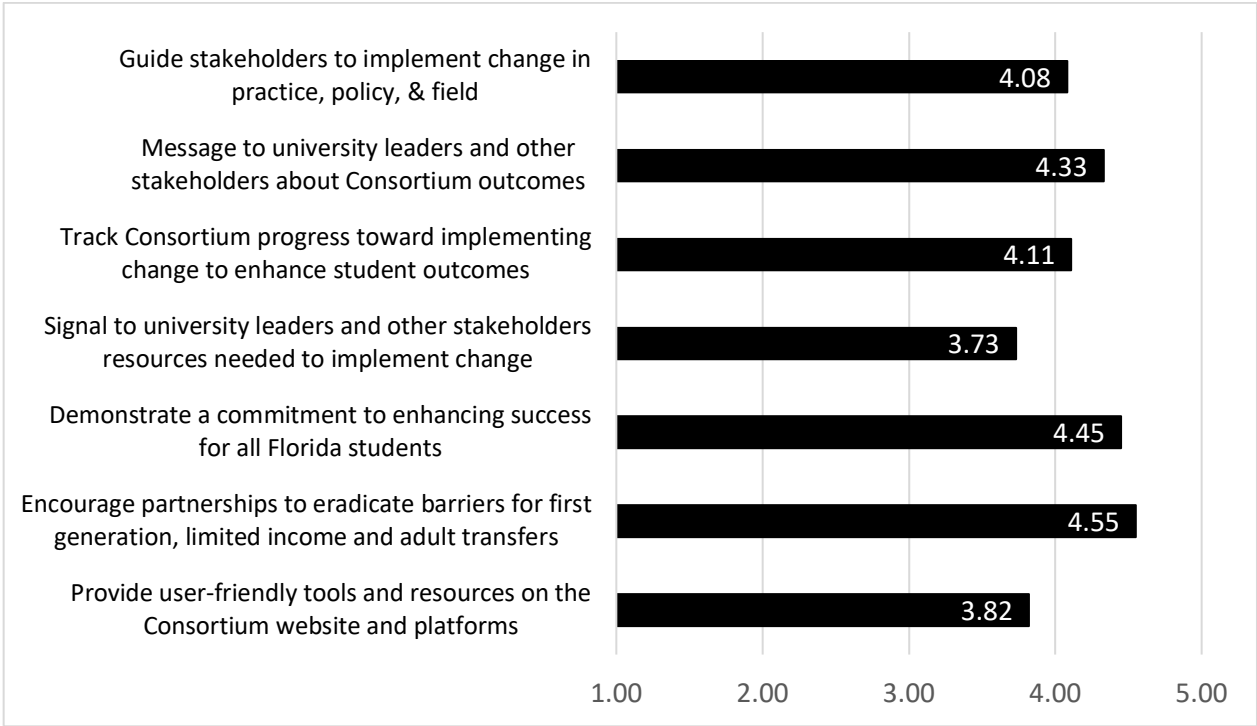
The next question on the survey asked respondents to rate the Consortium’s implementation of six process strategies that were included in the strategic plan. Again, the scale for assessing implementation utilized 5 points, extending from Not Implemented (1) to Extremely Well Implemented (5). From 10 to 12 respondents rated each of these items, with most items being assessed by 11 respondents (i.e., only 1 respondent said they did not have enough information to do the rating.) For all who rated the six process strategies, the average rating ranged from the lowest average rating of 3.80 for **write up results** to two items with the highest average rating of 4.33, i.e., **think big thoughts** and **communicate for impact**. Similar to the respondent ratings on the Consortium’s goals, no process strategy was rated at the Not Implemented or Minimally Well Implemented level (see Figure 2).

Figure 2. Respondent Average Ratings on Six Process Strategies



Respondents were then asked to rate the level of implementation of seven recommendations included in Equal Measures’ evaluation of the Consortium. The same scale was used for these items as the process strategies, with the scale extending from Not Implemented (1) to Extremely Well Implemented (5). From 11 to 12 respondents rated each of these items, with most items assessed by 11 respondents (only 1 respondent indicating they did not have enough information to respond). For all who rated the seven recommendations, the average rating ranged from the lowest average rating of 3.73 for **signal to university leaders and other stakeholders’ resources needed to implement change** to 4.55 for **encourage partnerships to eradicate barriers for first generation, limited income and adult transfers**. Similar to the other ratings, no recommendation was rated at the Not Implemented or Minimally Well Implemented level (see Figure 3).

Figure 3. Respondent Average Ratings on Seven Recommendations from the *Equal Measures Evaluation Report*



The next question invited respondents to comment on what they believed to be the Consortium’s most important accomplishments. Six respondents responded to this request, with multiple mentions of the university visits to Arizona State University, University of Arizona and University of Kentucky organized by Florida Consortium leaders. Another accomplishment mentioned by three respondents was about grant funding the Consortium had secured to meet the Consortium goals, indicating an appreciation for needed resources that the Consortium was providing to the partner universities. The six verbatim quotes from respondents on accomplishments follow:

- *Focused support, funding and time dedicated to transfer students through articulation projects.*
- *[S]trong commitment to student experience and success, as well as access. Coordinating the trip to learn best practices form others and foster relationships...*
- *The Summit on Accelerating Transfer Student Success.*
- *Transfer tour and utilizing the force of us as the big 3 [metropolitan research universities].*
- *The conferences, work that is underway from grants received, and bringing people together...*
- *The work to obtain grants from Helios and Lumina and implement strategies using these grants.*

In addition to accomplishments, respondents were invited to offer thoughts on changes the Consortium could make to help achieve its overarching goal of improving student success. Four respondents provided thoughts pertaining to this question. The four statements offered different perspectives that resonate with key pieces of the Consortium's strategic plan in terms of engaging in long-term and lasting change, leading advocacy and accountability for student success, breaking down barriers to data sharing and technology to promote student success, and engaging in comprehensive sustainability planning. Respondent quotes follow:

- *Given the nature of the work ahead, it will be helpful to understand that the goals are big enough to take longer than a year to implement and implement in a lasting way.*
- *Continue to be the voice of advocacy and accountability. Not just accountable for the internal consortium outcomes but holding leadership at consortium institutions accountable for pushing student success forward for marginalized and underserved student populations. In essence, being that statewide voice of advocacy in a way that leadership in our public universities can't.*
- *Continue to help institutions break down barriers related to data sharing and technology to best serve students*
- *A clearly thought-out comprehensive sustainability plan. This work I hope continues when all of us are retired or we've moved on.*

Looking ahead to how these survey results could be used to advance progress on the Consortium's strategic plan and future impact, the following actions could be taken:

- Review the survey results collectively to seek shared understanding on how to capitalize on strengths, address shortcomings, and turn opportunities into tangible outcomes advancing Florida college student success.
- Integrate these data with other information on the Consortium's activities, accomplishments, and outcomes to set priorities for guiding future strategic and tactical plans.
- Seek opportunities to scale-up the most impactful work to enable the Consortium to continue to grow its positive impact on students across Florida and beyond the state.
- Continue to survey Consortium leaders on a regular basis to identify strengths, find opportunities for improvement, and set priorities for actions that can lead to further positive impact.

## **2. The UCF Higher Education Coaching Academy's Consortium's Coaching Collaborative**

The UCF Higher Education Academy is focused on students' overall success – academic and holistic – and provides training that is specific to higher education coaching for higher education practitioners. The mission of Academy is *“to educate, train, and certify current and future academic coaches and leaders in higher education, and to advance knowledge and understanding of the coaching culture that includes student empowerment, change*

*management, and quality assurance” (UCF Higher Education Coaching Academy - Information and Overview.pdf)*. Funding for the Consortium’s Coaching Collaborative comes from a \$1.25 million dollar grant from the Helios Education Foundation.

By 2025, through the *Consortium’s Coaching Collaborative* program, the Academy seeks to train 500 participants who are employed by FIU, UCF, USF, and 16 Florida College System (FCS) colleges. The 8-week, 40-hour coaching training has been offered each term since spring 2022, reaching 132 people through spring 2023.

The Consortium’s Coaching Academy program leaders are:

- Dr. Jenny Sumner - Assistant Vice Provost, UCF Online, Division of Digital Learning Founder & Executive Director, UCF Higher Education Coaching Academy
- Dr. Pam Cavanaugh - Associate Vice Provost, UCF Connect, Division of Student Success and Well-Being Founder & Director, UCF Higher Education Coaching Academy

The Academy focuses on students’ academic success in the higher education context through training on academic coaching for academic professions using evidence (research) based results, with active instructional strategies. It utilizes fundamental coaching techniques and skills for higher education employees who seek to become coaches or “want to apply coaching techniques to their work with students.” Seven staff conduct training for the Coaching Academy, including Dr. Jenny Sumner who is one of the two leaders of the Academy. Each session is capped at 25 participants, but exceptions are made to accommodate individuals from the same work group or campus to encourage shared learning and application of newly acquired knowledge and skills in the collegiate workplace.

From spring 2022 through spring 2023, 132 employees completed the Consortium’s Coaching Collaborative training program, with 32 each from University of Central Florida (UCF) and University of South Florida (USF), with 20 more individuals from Florida International University (FIU) (Cavanaugh & Sumner, 2022).

A total of 84 participants represented the Consortium institutions:

- UCF (32)
- USF (32)
- FIU (20)

A total of 48 individuals participated representing nine Florida College System (FCS) partner colleges:

- Miami Dade College (11)
- Palm Beach State College (10)
- College of Central Florida (9)
- Broward College (9)
- Eastern FL State College (3)

- Seminole State College (2)
- Lake-Sumter State College (2)
- Valencia College (1)
- Daytona State College (1)

The breakdown of the Coaching Academy training schedule by term and number of participants from Summer 2022 to Spring 2023 appears below, with Table 1 provided further detail by term and institutions.

Spring 2022:

- 1 course section was offered [UCF Cohort]
- 17 participants from nine institutions

Summer 2022:

- 2 courses/sections were offered [FIU Cohort & USF Cohort]
- 44 participants from six institutions

Fall 2022:

- 2 courses/sections were offered [FIU cohort & USF Cohort]
- 43 participants from six institutions

Spring 2023:

- 1 course/section was offered [UCF Cohort]
- 28 participants from one institution

Table 1. Institutions by Term and Number of Participants in the Coaching Academy

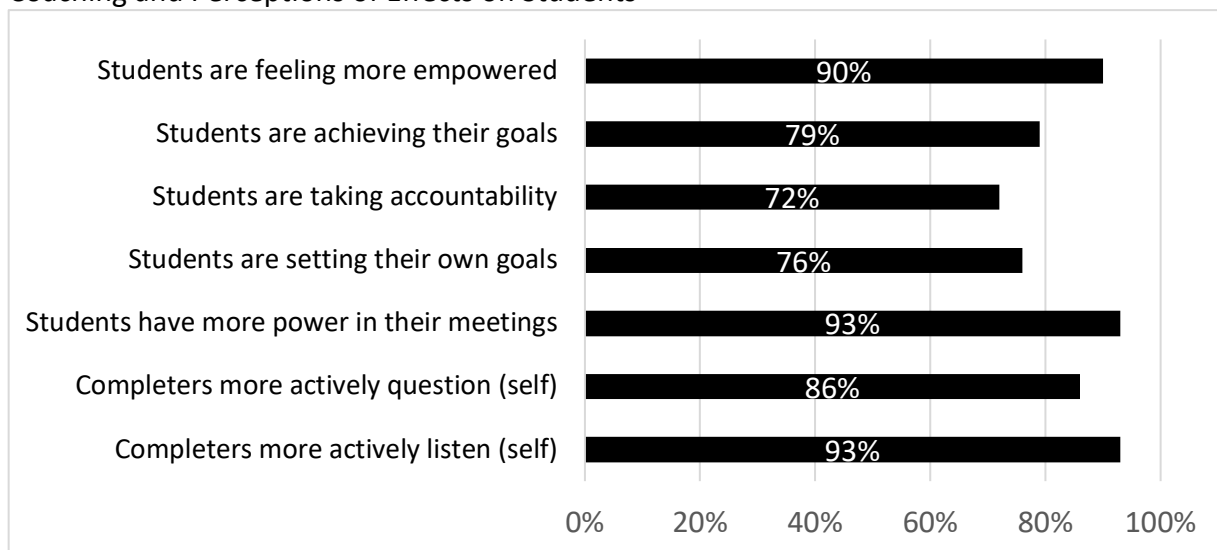
<b>Term</b>	<b>Number Participants</b>
<b>Spring 2022</b>	<b>17</b>
College of Central Florida	2
Daytona State College	1
Eastern Florida State College	3
Florida International University	1
Lake-Sumter State College	2
Seminole State College	2
University of Central Florida	4
University of South Florida	1
Valencia College	1
<b>Summer 2022</b>	<b>44</b>
Broward College	4
College of Central Florida	1
Florida International University	9
Miami Dade College	5
Palm Beach State College	5
University of South Florida	20
<b>Fall 2022</b>	<b>43</b>

Term	Number Participants
Broward College	5
College of Central Florida	6
Florida International University	10
Miami Dade College	6
Palm Beach State College	5
University of South Florida	11
<b>Spring 2023</b>	<b>28</b>
UCF	28

The end-of-training survey asked three statements to assess the overall quality of participant experiences. These questions were answered by between 105 and 111 *Consortium’s Coaching Collaborative* participants, representing 80% and 84% of all participants. Results of this survey showed 97% of participants rated the training at the 4 or 5 level on a 5-point Likert-agreement scale, indicating they strongly agreed or agreed that the training was valuable. A similarly higher percentage of respondents, 95%, agreed or strongly agreed that the training was worth the time, and 91% agreed or strongly agreed that the training was extremely or very valuable (Cavanaugh & Sumner, 2023).

In Spring 2023, completers from the first year of the *Consortium’s Coaching Collaborative* offered in Spring, Summer and Fall 2022 were surveyed about how they were impacted by their training experience. Thirty-two completers (approximately 30%) responded to share results. Again, the respondents were overwhelmingly positive toward their own learning and application of coaching and their perceptions of the positive effects on students, including students feeling more empowered (90%) and students having more power in their meetings (93%) (see Figure 4).

Figure 4. Respondent Feedback on Coaching Training Completers Learning, Application of Coaching and Perceptions of Effects on Students



In Spring 2023, completers of the first year of the *Consortium's Coaching Collaborative* offered in Spring, Summer and Fall 2022 were surveyed about how they were impacted by their training experience. Thirty-two completers (approximately 30%) also responded to these questions about overall impact, with 86% agreeing or strongly agreeing that they use coaching always or most of the time, 97% agreeing or strongly agreeing that they feel comfortable using coaching, and 93% agreeing or strongly agreeing that coaching has influenced their students "for the better" (Cavanaugh & Sumner, 2023).

Direct quotes from respondents' follow-up surveys about the quality of the training and their perceptions of its influence on their experiences engaging in coaching in their jobs follow:

- *This was a very high-quality training full of practical tools that I was able to immediately put into practice. The trainers were very knowledgeable and professional, and obviously great coaches themselves...*
- *Great job!! Loved the trainers and how long the class was. I felt like I could learn and practice it with students at the same time.*
- *The success coach training was superb!! I learned a lot, and the training environment virtually and in person was excellent and promoted the success of each participant.*
- *It was a great program that helped us develop as professionals on how to help our students grow.*
- *I appreciate this opportunity! I'm grateful that this was a free resource. I feel it was great for beginner coaches.*

Looking ahead, the Academy plans to host training courses for the grant-funded *Consortium's Coaching Collaborative* program through 2025 (Cavanaugh & Sumner, 2023). Courses planned in 2023 for this training program include three courses/sections for Summer 2023 with a current enrollment of:

- FIU Cohort = 23 participants [4 institutions represented]
- UCF Cohort = 27 participants [1 institution represented]
- USF Cohort = 26 participants [7 institutions represented]

In addition, the Academy will be hosting three courses/sections for Fall 2023, but the enrollment has not yet opened for these sessions. Furthermore, the Academy plans to develop follow-up cohort reunions where past participants from the *Consortium's Coaching Collaborative* can showcase how they are using their newly acquired coaching skills. Opportunities to share lessons learned by the Academy with other Florida Consortium universities and partners will also be important as the Academy gains more experience, gathers more data on the impact of coaching, and shares experiences that others can benefit from knowing and putting into practice statewide and beyond the state of Florida.



### 3. FIU's Transfer Coaching and Student Scholarships

The Transfer Success Coach (TSC) works directly with transfer students to set and achieve academic and career success goals. Through coaching technique and methods, the TSC works collaboratively to:

- identify and remove barriers to student success
- provide timely support and resources to help reduce attrition, and
- maximize on-time graduation.

The target audience for Florida International University (FIU) transfer coaching focuses students who have transferred to FIU and who can benefit from personalized guidance from a dedicated transfer coach. Associate of Arts (AA) Florida transfer students who are currently enrolled at FIU with 85- to 87 credits and a 2.0 or higher GPA are the primary target audience for FIU's transfer coaching and scholarships. The students fit one of the following categories of experience with transfer:

- AA FL Transfer Students (unfunded)
- Transfer Students from FL State Colleges who did not complete an AA
- Transfer Students from FL State Universities
- Transfer Students from FL Private Universities
- Transfer Students from Out of State Colleges
- Transfer Students from Out of State Universities

FIU employs a professional staff member trained by the UCF Higher Education *Consortium's Coaching Collaborative* to coach transfer students. A sub-set of these students receive a scholarship to address financial needs that could impede their completing their last year of college. Examples of coaching topics and tools include:

- Adjusting to FIU campus life
- Identifying goals
- Time management
- Study strategies
- Motivation
- Managing obstacles
- Evaluating progress towards academic/career goals
- Post-graduation planning

Tools used in transfer coaching at FIU include:

- Appreciative inquiry
- Reflective inquiry
- SMART goals
- Priority matrix
- Wheel of Life

The FIU professional employee who acts as a coach for transfer students helps students understand a wide range of opportunities and navigate many different changes that may get in

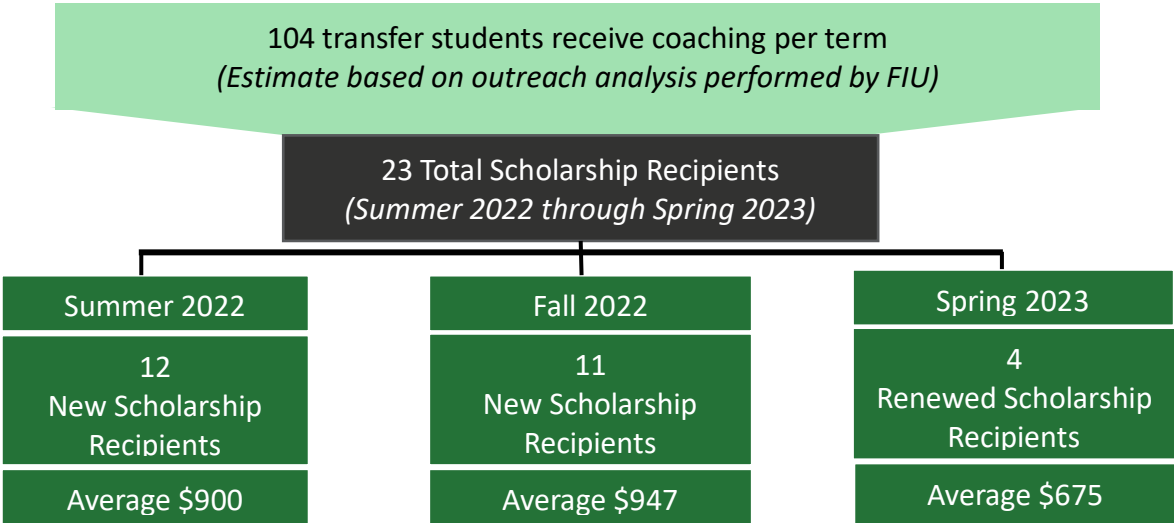
the way of students’ reaching a timely graduation. The opportunities and challenges that the FIU transfer coach has documented are listed in Table 2.

Table 2. Transfer Coaching on Opportunities and Challenges

<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• Curriculum for micro credentials</li> <li>• Collaborate with Mentor2Mentor Collaborative</li> <li>• Engage with Connect4Success students</li> <li>• Collaborating with FIU Bridge Advisors</li> <li>• Miami Dade College/Broward College events</li> <li>• Codesign a career workshop targeted to working transfer students</li> <li>• More presence at Admitted Student Day/Orientations</li> <li>• Off Business Hours Services Evening/Weekends</li> </ul>	<p><b>Challenges:</b></p> <ul style="list-style-type: none"> <li>• New institutional processes (policies, language, resources)</li> <li>• New location on/off campus</li> <li>• New modality transitioning in-person to online (or vice versa)</li> <li>• New program (rejected/did not meet requirement for limited access programs)</li> <li>• Personal challenges (relationships, illness or death in family, medical issues)</li> <li>• Financial (working extra hours, taking less courses especially if paying out of pocket, car expenses, increased rent, unexpected expenses related to dropping courses)</li> <li>• Class expectations not met</li> </ul>
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The individuals receiving coaching and scholarships are a diverse group of transfer students in their last year of college who receive funds ranging from \$400 to nearly \$2000 (median of \$1000) to support their completing a bachelor’s degree at FIU (based on data supplied to the evaluator by FIU in May and June 2023) (see Figure 5).

Figure 5. Visual Representation of Transfer Coaching for Transfer Students and Transfer Scholarship Recipients



Twenty-three (23) transfer students received scholarships in addition to transfer coaching. This diverse group of students is in their last year of undergraduate study, with nearly all being full-time enrolled. Forty-three percent are Pell first-year (See Table 3). The transfer scholarships ranged from \$400 to nearly \$2000, with a median of \$1000.

Table 3. Characteristics of FIU Transfer Scholarship Recipients

Student Characteristics	Percentage	Number
Identify as Female	61%	13
Identify as Male	39%	9
Identify with Racially Minoritized Group	91%	21
AA Transfer	96%	22
Full-Time Enrolled	96%	22
Pell 1st Year	43%	10
Avg Cumulative GPA	3.21 / 4.0	
Range Cumulative GPA	2.15 - 3.98	
Avg Transferred Credits	66	
Avg Cumulative Credits	115	
Avg Percent Credit Counted Toward Grad.	87%	

Note: Author analysis of data files shared by M. Castaneda (June 2023). Characteristics were unavailable for two transfer scholarship recipients.

The academic programs of transfer scholarship recipients are listed in Table 6 below. The average cumulative GPA is 3.21 out of 4.0, with Arts, Sciences & Education and Business Administration being the top academic programs of study of the transfer scholarship recipients.

Table 6. Academic Programs of FIU Transfer Scholarship Recipients

Academic Program	Number
Arts, Sciences & Education	7
Business Administration	6
Green School of International & Public Affairs	4
Communications, Architecture & the Arts	3
Hospitality Management	1
Engineering	1
Non-Degree	1

Note: Author analysis of data files shared by M. Castaneda (June 2023). Characteristics were unavailable for two transfer scholarship recipients.

In addition to the FIU transfer students who received transfer coaching and scholarships, 81 transfer students did not receive scholarships but engaged in transfer coaching in the spring term of 2023. Similar to the transfer scholarship recipients, nearly all of these students are AA transfer and full-time enrolled (See Table 7). An even higher percentage of this group is Pell first-year (62%) compared to 43% of the scholarship recipients. The average cumulative GPA for this group is slightly lower than the transfer scholarship recipient group, at 3.09 compared to 3.21 out of 4.0. Arts, Sciences & Education and Business Management were the top academic programs for this group, similar to the transfer scholarship recipient group (see Table 8).

Table 7. Characteristics of FIU Transfer Students Receiving Transfer Coaching

Student Characteristics*	Percentage	Number
AA Transfer	96%	78
Full-Time Enrolled	99%	80
Pell 1st Year	62%	50
Avg Cumulative GPA	3.09 / 4.0	
Avg Total Transferred Credits	67	
Avg Total Cumulative Credits	106	

Note: Author analysis of data files shared by M. Castaneda (June 2023). Demographic characteristics (gender and race/ethnicity) are not reported for this group due to missing or unknown data.

Table 8. Academic Programs of FIU Transfer Students Receiving Transfer Coaching

Academic Program	Number
Arts, Sciences & Education	32
Business Administration	22
Green School of International & Public Affairs	7
Communications, Architecture & the Arts	5
Public Health & Social Work	5
Nursing and Health Sciences	4
Hospitality Management	1
Engineering	1
Non-Degree	1

Importantly, FIU transfer coaching does not operate in isolation. An important indicator of the integration of transfer coaching with other units that center their work on student success is shown in Table 9. Partners and collaborators who recognized as essential to transfer coaching and transfer student success include the universities Transfer and Transition Services unit, College Life Coaching, and others. External entities important to transfer coaching include the other universities in the Florida Consortium (UCF and USF), as well as Florida State College (FCS) partners: Miami Dad College, Broward College, and Palm Beach State College.

Table 9. Internal and External Partners and Collaborators for FIU Transfer Coaching

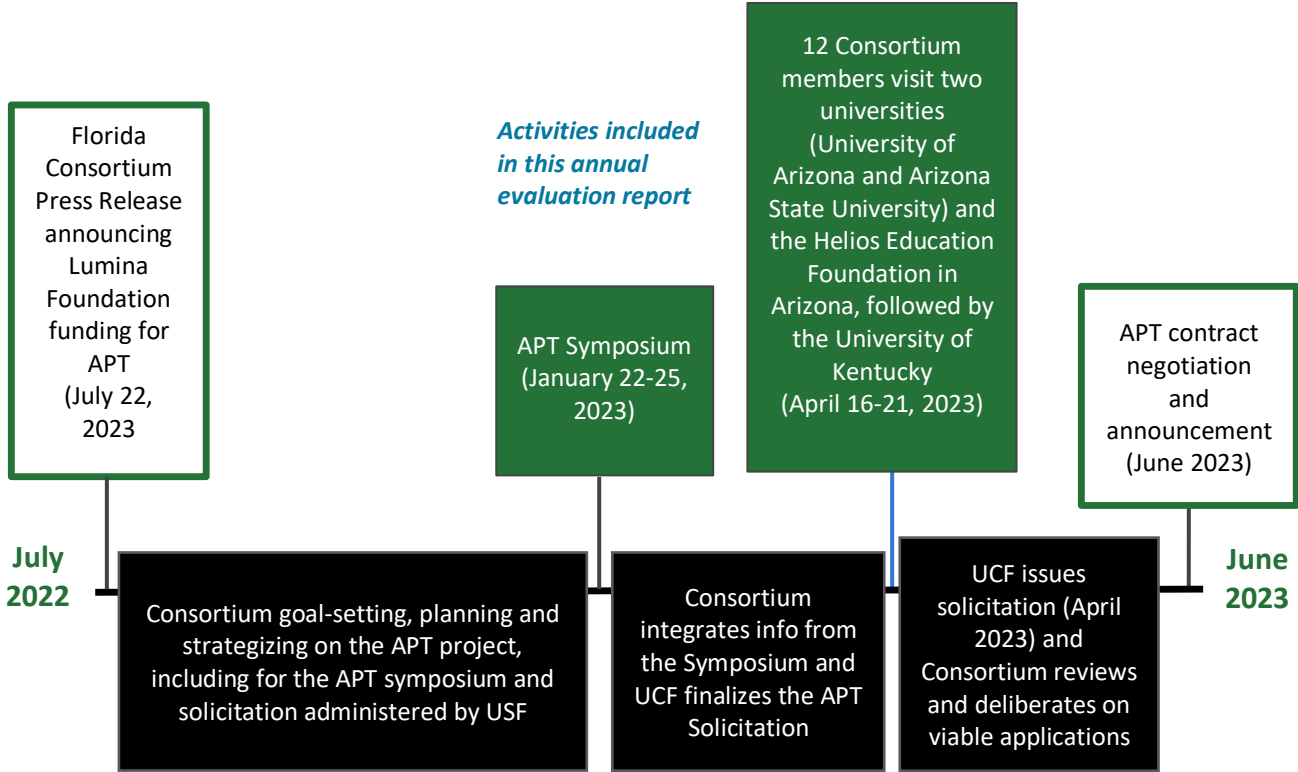
<p><b>Internal to FIU:</b></p> <ul style="list-style-type: none"> <li>• Transfer and Transition Services</li> <li>• College Life Coaching</li> <li>• Progression Team</li> <li>• Financial Wellness Program</li> <li>• FIU Scholarships</li> <li>• Orientation</li> </ul>	<p><b>External to FIU:</b></p> <ul style="list-style-type: none"> <li>• Florida Consortium of Metropolitan Research University partners (UCF and USF)</li> <li>• Florida State College (FSC) partners (Miami Dade College, Broward College, and Palm Beach State College)</li> </ul>
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Looking ahead, FIU will continue to offer transfer student coaching, including awarding scholarships to advanced transfer students who demonstrate financial need. Furthermore, FIU has begun to amass an impressive set of data on transfer students who have received coaching and scholarships, and these data will serve the institution well as it makes decisions to support and potentially grow the impact of transfer coaching across more Consortium institutional partners. FIU is encouraged to use the transfer student dataset to assess how students are experiencing coaching and achieving their intended collegiate outcomes. Moving forward, it will be important for FIU to share lessons learned with these partners, including with UCF and USF and FCS institutions. Sharing evidence of impact and lessons learned with more institutions across the state of Florida could enhance transfer student success.

**4. The Articulation Platform Technology (APT)**

The Consortium seeks to build the Articulation Platform Technology (APT) as part of the Florida Consortium Transfer Success Network (The Florida Consortium for Metropolitan Research University press release on July 21, 2022: <https://floridaconsortium.com/florida-consortium-lumina-grant/>). Funded by a Lumina Foundation grant of \$400,000, this tool will assist the Consortium to elevate the successful degree completion of first-generation, racially minoritized, and underserved students in the most populous metropolitan regions of the state (South Florida, Central Florida, and Tampa Bay). The APT will assist the three university and sixteen FCS partners to target support for 5,000 transfer students (2,000 Hispanic students, nearly 700 Black students and >3,000 additional Pell-eligible students) by 2027. The timeline for the APT from July 2022 to June 2023 appears in Figure 6, with two major activities highlighted in green that are the focus of this external evaluation.

Figure 6. Visual Representation of the Articulation Platform Technology Timeline and Major Activities, including the APT Symposium and University Visits.



**The APT Symposium**

A key component of this project was the APT Symposium held on January 22-25, 2023, in Tampa, Florida to set goals, specify the key aspects of the APT solicitation, and establish workable action steps. Goals established for the Symposium were to:

- Identify processes needed to adopt the technology including wire framing and designing the interface for a successful launch.
- Identify data needed to power the APT and design a data sharing agreement to ensure proper updating.
- Design process for cross university course approvals.
- Develop data-merging agreement to segment for common course numbering and expansion to other colleges and universities.
- Coordinate workplan to complete the work in a timely fashion.
- Develop a marketing and communication plan for students, parents, and our state college partners.

The Symposium’s agenda was highly interactive, with participants engaged in large-group sessions and small break activities to document participant suggestions for the APT. Approximately 40 people participated in the Symposium over the three days, with about two-thirds of these individuals responding to an online survey conducted at the end of the meeting to evaluate the Symposium. The survey included scaled items concerning overall quality and the effectiveness of presenters. In addition, specific items asked respondents to assess their level of agreement with the helpfulness and value of 10 specific meeting elements (organization, pace, materials, etc.), and open-ended statements were also gathered on lessons learned for future meetings.

Survey responses were received from Symposium participants of all three partner institutions, with 9 participants from FIU, seven from UCF, and 7 from USF. One respondent did not provide their organizational affiliation. Most survey respondents indicated they had no previous experience with the Consortium, with 18 (75%) reporting no prior experience. The Symposium’s success in involving so many people new to the Consortium suggests an opportunity to increase awareness and engagement in the APT initiative specifically, but also other activities important to the Consortium’s agenda in the future.

Respondents rating of the quality of the APT symposium was very high, with 61% of respondents rating the overall quality as very high and 39% rating it high (see Figure 7). The average respondent rating for overall quality was 4.6 out of 5.0. Respondent ratings of presenter effectiveness were also rated as high, but a slightly smaller percentage of respondents indicated a very high rating. In this case, presenter effectiveness was rated at a very high level by 48% of the respondents and at a high level by the other 52% (Figure 8). The average respondent rating for presenter effectiveness was 4.5 out of 5.0. It is also noteworthy that no respondents gave the overall quality of the symposium or presenter effectiveness a lower rating than the high level.

Figure 7. Respondent Ratings of the Overall Quality of the APT Symposium

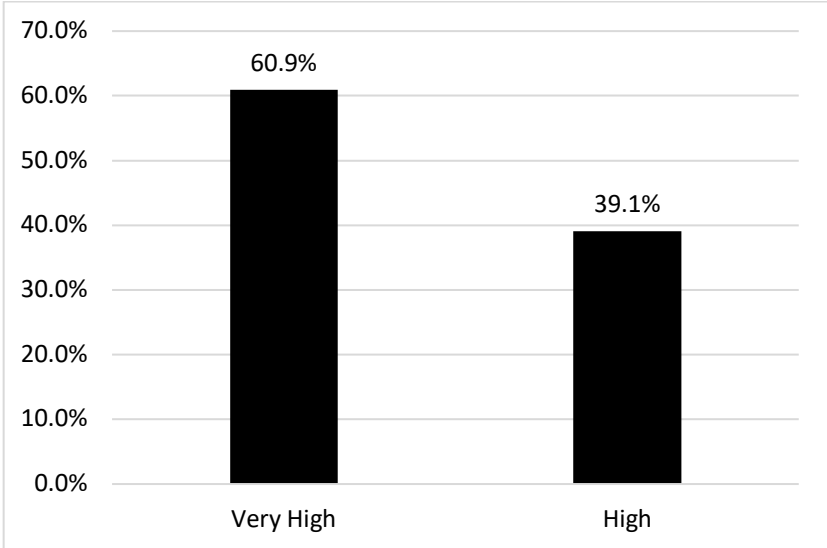
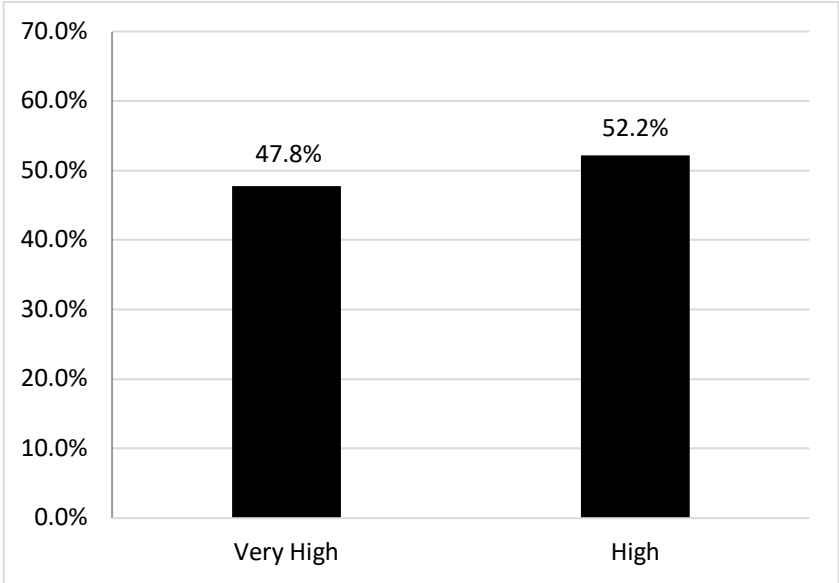


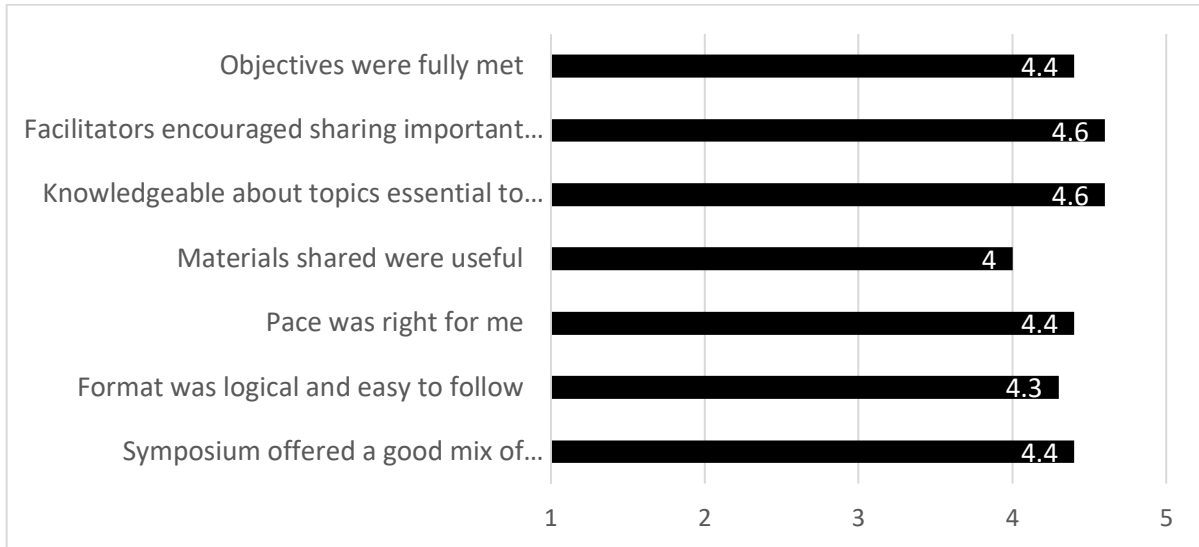
Figure 8. Respondent Ratings of APT Symposium Presenter Effectiveness



Respondents were also invited to rate seven elements of the APT Symposium on a 5-point scale extending from 1 for Strongly Disagree to 5 for Strongly Agree. The average respondent ratings are shown in Figure 9 below. In brief, none of the seven elements were rated lower than 4.0 on a 5.0 scale, with two elements rated at the highest level of 4.6: 1) facilitators encouraged sharing important information and diverse perspectives and 2) presenters were knowledgeable about topics essential to developing the APT. The lowest rated element concerned the usefulness of materials, at 4.0. No respondents strongly disagreed with any of the statements about the APT Symposium elements. These average ratings indicate respondents were generally well satisfied with their experience attending the APT Symposium, with some room for improvement in terms of materials accompanying the meeting.

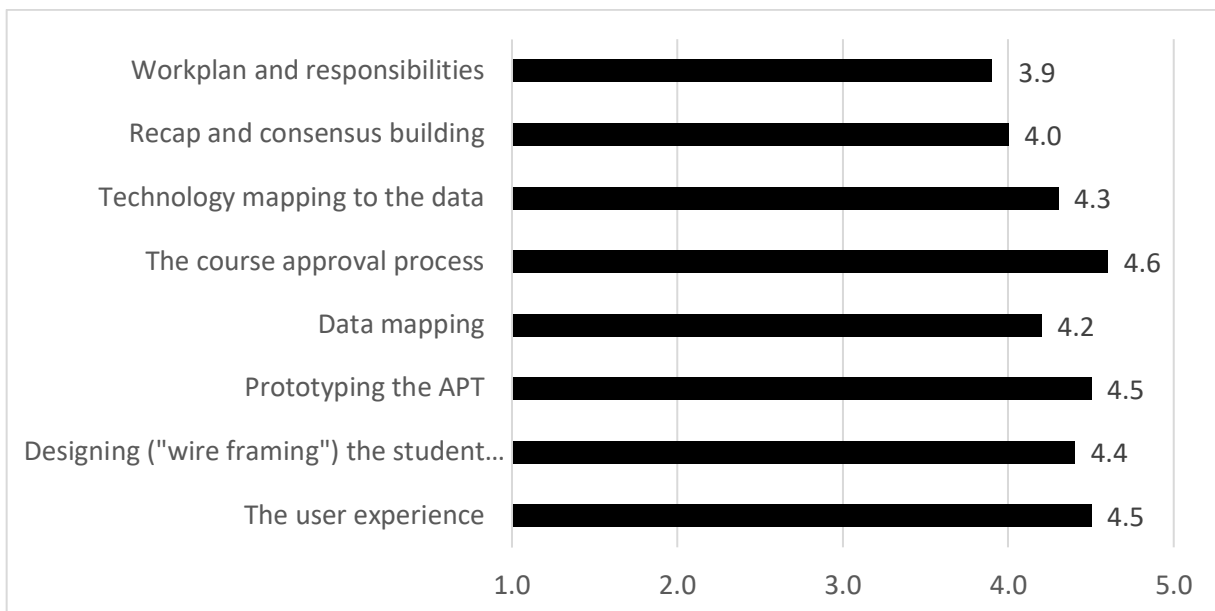
Figure 9. Average Respondent Ratings of Seven Elements of the APT Symposium





One additional scaled question invited Symposium participant respondents to rate the level of helpfulness of eight features of the APT. A 5-point scale was used, extending from 1 for Uncertain/Not Applicable to 5 for Extremely Helpful. In response to this question, the average rating of respondents ranged from 3.9 for workplan and responsibilities to 4.6 for the course approval process (Figure 10). Other features receiving average ratings at a level nearly as high are prototyping the APT (4.5), the user experience (4.5), and designing “wireframing” the student experience (4.4). The value of these features is important for the Consortium to understand in the development of the APT, which was further evidenced in the RFP for the APT released by USF with leadership engagement from across the Consortium. At the time of this writing, a decision on the selection of a contractor to build the APT is expected but not yet released publicly; however, notification is expected soon.

Figure 10. Average Respondent Ratings of Eight Features of the APT



The survey also provided the opportunity for individuals to identify something they learned from another institution or partner that they planned to take back to their institution. The comments indicated a great deal of sharing and inter-institutional learning took place at the Symposium, reflecting an important goal of the meeting. Seventeen participants responded to this question, with numerous comments reflecting learning about **course equivalencies**. In some cases, respondents said they learned about how other institutions were handling course equivalencies and in other cases, respondents said they learned more about how their own institutions handled course equivalencies. Of all the subjects covered at the Symposium, matters related to course equivalency were very high priority for many respondents, with many comments reflecting the value of sharing information about how these processes work across the three universities and beginning a conversation about how sharing ideas might lead to improvements. Examples of these statements include:

- *The Course Equivalency Process (CEP) when a course does not have an existing rule.*
- *I was able to see the course equivalency system at UCF.*
- *That we all acknowledge the benefit of sharing equivalencies among our institutions.*
- *Upper division course equivalency may need to be updated.*
- *I learned the similarities and differences between the Transfer equivalency processes.*

“

Three of the comments mentioned the role of faculty, including recognizing that faculty may or may not need to be involved in determining course equivalencies. Examples of these statements include:

- *The ways faculty are incorporated at UCF is interesting and I'm hoping we explore how we can apply that [at our institution].*
- *The course equivalency evaluation is not always accomplished by faculty.*
- *The idea of having dedicated staff rather than faculty manage the course equivalency process for lower-level courses.*

These responses from approximately half of the Symposium participants represent a strong collective interest in aligning and improving the course equivalency processes within and possibly across institutions. The intersection of course equivalency may plan in the development and implementation of the APT is yet to be determined, but an important area to follow as the APT project continues to unfold.

Last, respondents were asked to provide one or two recommendations to improving meetings led by the Consortium in the future. Thirteen respondents gave a response, with four of these individuals indicating they had no specific recommendations. However, nine respondents provided suggestions for future convenings, including:

- Provide more clarity on objectives and prior actions/decisions related to the main topics of the Symposium
- Incorporate more breakout sessions for functional roles

- Distribute organization charts for each institution (for context)
- Provide visual org charts for each institution
- Include more faculty in future meetings
- Hold more frequent meetings for follow-up
- Hold meetings closer to campus or nearby city
- Have the materials in fully electronic format

## University Visits

Emerging from regular discussions of the Florida Consortium’s leadership group was the idea to visit other universities engaged in improving transfer to identify lessons for adoption by the three metropolitan research universities. This idea took root and led to the decision for a delegation of Florida Consortium leaders to visit Arizona State University, University of Arizona and the University of Kentucky on April 16-21, 2023. The Florida Consortium director, Michael Preston, and Scott Mauro, Associate Director of Strategy and Communications, organized the travel and meeting itineraries, and In June 2023, Dr. Preston held an online debriefing meeting to capture reflections and lessons learned about the visits.

In planning the trip, concerted attention was paid to ensuring that the meetings would garner information needed to support the development of the APT. Included in this effort was an intentional focus on the following areas of interest to the Consortium:

- Identify processes needed to adopt the technology (similar to APT), including wire framing and designing the interface aspects needed for a successful launch.
- Identify the data needed to power this technology and designing a data sharing agreement to ensure proper updating of the technology.
- Design a process for cross university course approvals.
- Develop a data merging agreement to segment for common course numbering and other colleges and universities.
- Coordinate a workplan to complete the work in a timely fashion.
- Develop a marketing and communication plan for students, parents, and our state college partners.

During the June 2023 debrief, individuals traveling to the universities came together to share observations and lessons learned. This robust hour-long conversation addressed a wide range of areas of interest to the Consortium’s development of the APT, as well as other means of improving transfer student success. Individual reflections of members of the group included:

- Center students in the Consortium’s intentional work to improve transfer and articulation.
- Expand agreements within and beyond the state of Florida.
- Use curricular analytics to answer specific questions about how transfer is working and what improvements to make to benefit students, including using strategies that take the data directly to units where problem-solving sessions can be customized to address specific questions and concerns.

- Enlist campus leadership, faculty, and staff to optimize the implementation of transfer policy and process improvements.
- Delve more deeply into what the three universities have learned in developing and implementing technology similar to the Consortium’s APT project.
- Understand how university support and funding (or lack thereof) affects how transfer processes work for students.
- Give more consideration to how differences in the scale of transfer in the three Florida universities and the three visited universities may have an effect on transfer student success and processes that need to improve; What can be learned by considering how scale affects policies, processes and student outcomes.

Looking ahead, the Consortium is encouraged to apply lessons from the university visits to the APT process led by USF, including refining the features of the technology, and executing plans for how the APT will be created, implemented, and evaluated over time. Information gathered during the visits can help guide the APT process from solicitation to implementation, taking care to address interim milestones enroute to targeted outcomes. Given the success of the APT Symposium, the Consortium is encouraged to continue sponsoring and hosting meetings that bring other Florida campus leaders, faculty, staff, and stakeholders together to advance common goals to improve student success. The Consortium’s Florida Summit on Accelerating Transfer Success, to be held this year on November 6, is another important example of a convening that is having an impact on the transfer process and student success statewide. Through this effort and others, the Consortium is encouraged to keep finding ways to scale-up transfer and articulation efforts within and beyond the state of Florida.

## Take-Aways

This first annual evaluation report summarizes the Florida Consortium’s goals, activities, and accomplishments for the 2022-23 fiscal year, featuring the Coaching Academy led by UCF, transfer coaching and student scholarships awarded by FIU, and the comprehensive solicitation and decision-making process for the new Articulation Platform Technology (APT), led by USF. In addition, a survey is conducted of university leaders who are knowledgeable of the work of the Consortium and who were thought to be able to provide information valuable to assessing past accomplishments and provide insights into future planning. The following observations begin with key findings from the Network Leadership Survey and proceed to observations and lessons learned about the other three Consortium activities featured in this annual evaluation report.

### The Network Leadership Survey

- Respondents give high marks to the overall accomplishments of the Florida Consortium, providing an overall average rating for accomplishments at 8.6 out of 10.0
- Respondents perceived that the Consortium is making good progress on accomplishing goals and process strategies prioritized in the 2019-2023 Strategic Plan, and on implementing recommendations from the 2021 *Equal Measures Evaluation* report.

- Some variability was observed in such as writing-up (reporting) results, ensuring adequate resources are secured on university campuses to make changes to improve success for the large number of transfer students attending each school, and signaling to campus leaders what the Consortium is accomplishing and its importance to Florida college student success overall.
- The survey results should be future exploited for additional insights into how best to integrate, align and grow positive change in transfer student success.

### **The UCF Higher Education Coaching Academy's Consortium's Coaching Collaborative**

- The *Consortium's Coaching Collaborative* has experienced a high level of success in its first year and is continuing to grow and engage more employees of the three partner universities as well as FCS partner colleges. The potential to continue to grow engagement and impact is very promising under the committed and enthusiastic leadership of Dr. Pam Cavanaugh and Dr. Jennifer Sumner at UCF.
- Results of surveys conducted immediately after the conclusion coaching training demonstrate a high level of satisfaction and perceived growth in understanding of coaching as well as the how the practice of coaching can and should operate in higher education. Participants in the coaching training perceive they are well prepared to engage in coaching and that their practice will have a positive impact on students. Follow-up surveys conducted with coaching training participants confirm that these perceptions track well with the coaches' actual experience working with students.
- Plans for future coach training are ambitious, including hosting three courses/sections for Fall 2023, developing follow-up cohort reunions where past participants can showcase how they are using their newly acquired coaching skills, and engaging with other Florida Consortium universities and partners to learn, share data on impact, and grow this promising practice statewide and beyond the state of Florida.

### **FIU's Transfer Coaching and Student Scholarships**

- An initiative directly related to UCF's *Consortium's Coaching Collaborative* is transfer coaching and student scholarships at FIU. Aligning FIU's transfer efforts with the *Consortium's Coaching Collaborative*, FIU established a transfer coaching process that is engaging over 100 transfer students per term (based on spring 2023 data) and thus far, has awarded scholarships to 23 transfer students. The purpose of this scholarship is to provide the financial support that advanced transfer students need to complete their programs of study in a timely and academically successful way.
- FIU students who participate in transfer coaching and receive student scholarships are a diverse group of learners, with solid academic performance. The average cumulative GPA of the scholarship recipients is 3.21 out of 4.0 and 3.09 out of 4.0 for students receiving transfer coaching only. The academic programs pursued by all these students are most prevalent in the areas of Arts, Sciences and Education and Business Administration. Also, Pell recipients make up a sizeable proportion of both groups of students, particularly those receiving transfer coaching but no scholarship.
- Internal and external partners play a critical role in the implementation of transfer coaching, including engagement with UCF, as well as USF.

### **The Articulation Platform Technology (APT)**

- The work on APT is multi-faceted, including the funding of USF to provide leadership for the contracting and execution of the design and develop the technology. To facilitate this effort, the Florida Consortium hosted the APT Symposium in January 2023, including all three university partners as well as the Florida College System's leader of articulation and transfer. Collectively, this meeting provided the opportunity to bring teams from each campus together to share critical information about how transfer works on their campuses and to engage in collaborative dialogue about how transfer might work more effectively and efficiently across the three universities.
- Results of a survey of participants in the APT Symposium show positive findings on the value of the meeting, particularly information shared about how course equivalency processes work within and across campuses. The roles faculty and staff currently play and how future engagement of these groups might change to promote student success was also discussed.
- University visits were conducted by a delegation of the Florida Consortium, providing the opportunity for campus leaders to learn how transfer policies, processes and technologies work at Arizona State University, University of Arizona, and University of Kentucky. Lessons learned about technology that is being implemented on these campuses, including how the technology was developed and operationalized, was important to the group, with particularly insightful observations of the way the scale of transfer student enrollment compared to campuses resources may impact the work that gets done and how students benefit from it.

### **Last Thoughts**

The Florida Consortium of Metropolitan Research Universities has demonstrated a strong commitment to achieving its goals over the past year. The partner universities are well engaged numerous process strategies and initiatives illustrated by the UCF Higher Education Coaching Academy Consortium's Coaching Collaborative, the FIU transfer coaching and student scholarships, and the Articulation Platform Technology (APT). Other initiatives such as the annual Summit on Accelerating Transfer Success; recognition of advancements in transfer policies and practices on each campus, including UCF's collaborative work with Valencia College's business programs; efforts to improve connections to careers; strategies to improve transfer experiences for adult learners; and others will be the focus of future annual evaluations. For now, the Consortium is encouraged to continue building momentum by advancing what's going well and strategically addressing opportunities to improve and scale positive change to improve student success in the state of Florida.

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