



**FLORIDA  
CONSORTIUM**  
OF METROPOLITAN  
RESEARCH UNIVERSITIES

# **2024 EXTERNAL EVALUATION REPORT**

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## Executive Summary

This evaluation report summarizes the goals, activities, and accomplishments of the Florida Consortium of Metropolitan Research Universities for the 2023-24 fiscal year, featuring numerous efforts to improve transfer student success. During this year, the Consortium leadership changed from Dr. Michael Preston to Mr. Scott Mauro who is serving in an “acting” Consortium director. Onboarded by Dr. Preston a couple of years ago, Mr. Mauro has provided continuity in leadership of the Consortium, including conducting regular Zoom meetings with the University of Central Florida, where Mr. Mauro is employed; the University of South Florida, in Tampa; and Florida International University (FIU). He is also the primary contact for the Consortium with numerous audiences, including the Florida president’s group, state agencies, and numerous professional groups dedicated to improving transfer student success.

This report provides a description of key activities implemented during 2023-24, including the annual transfer summit, the Coaching Academy led by the University of Central Florida (UCF), transfer coaching and scholarships awarded by Florida International University (FIU), and the Articulation Platform Technology (APT) and transfer research led by University of South Florida (USF). Important findings on this year’s scope and accomplishments are:

- ⇒ Held annually, the **Florida Summit for Accelerating Transfer Success** continues to grow in number of participants, involving nearly 200 participants in the November 6, 2024, all-day event held at the University of South Florida. The robust agenda involved speakers from FIU, UCF, and USF, as well as Florida State College (FSC) institutions. Additional participants attending the Summit came from other Florida public and private universities, as well as FSC institutions not counted among the formal list of 16 FSCs. It is also noteworthy that early registration has begun for the 2024 transfer summit, and these registrations already exceed 2023 summit attendance.
- ⇒ Funded by the Consortium, the **Coaching Academy** led by UCF and the Helios Transfer Success Grant continues to grow in training higher education professionals affiliated with the university and FSC partners. Up to January 2024, the Academy had trained 334 professionals from the three partner universities, as well as FCS partner colleges. Consortium data documenting participants to the present time reveals this number to be 556 to date. Consistent with the end-of-training survey results presented in the 2023 evaluation report, feedback on the coaching training was very positive. Both content and format were praised by participants for their relevance and applicability to institutional efforts to increase student success, particularly transfer student success. Also presented in this report are insights from leaders at Daytona State College (DSC) on how theory and practice they learned in the Coaching Academy is being deployed to reform, restructure and invigorate academic coaching and advising to enhance student success.
- ⇒ Building on UCF’s Coaching Academy training, FIU is working to enhance transfer student efforts with a dedicated **Transfer Coach and Scholarships**. Cumulatively, the

transfer coach documents 1302 FIU transfer students who have been involved in outreach and a modest level of engagement, 150 FIU transfer students who have had more extensive engagement, and 111 FIU transfer students who have participated in coaching. These numbers include some duplicate counts because some students participate in coaching over the course of multiple years. In addition, a total of 29 FIU transfer students have received a scholarship to help them navigate the last year of their studies and complete their degree. Six of these students receive a scholarship during the 2023-24 academic year. Students engaging with the transfer coach on some level, from referral to more active engagement to coaching and finally to scholarship, take a wide range of majors, completing bachelor's degrees in programs of study across the university.

- ⇒ The **Articulation Platform Technology (APT)** and transfer research projects conducted at USF involve outside vendors, with a new contractual arrangement emerging at this time to secure “tech” for the APT. Limited information is available due to on-going review processes conducted by USF to be able to appropriately award the contract. In addition, USF has recently contracted with Hanover Research to study transfer student success, with results of available from this project in summer 2025, just prior to the conclusion of the Consortium's Helios grant. This budget change to the Helios grant was approved prior to reallocation of funding at USF for this Hanover Research project.

In conclusion, the Consortium continues to engage the three partner universities and 16 FSC institutions in various initiatives designed to improve transfer student success. Among these is the UCF Higher Education Coaching Academy *Consortium's Coaching Collaborative*, the FIU transfer coaching and scholarships, and the Articulation Platform Technology (APT) and transfer research led by USF. Other initiatives integral to the Consortium include the annual *Summit on Accelerating Transfer Success*, as well as other efforts to improve transfer policies and practices on each partner university campus and extending more widely to higher education Florida. As the Consortium approaches its final year, ending the current grant in summer 2025, it will be important to document even more fully and explicitly how the Consortium is influencing transfer student success within and across the partner universities and FSC schools. Being able to evaluate the Consortium's influence on transfer student success is important to fulfilling the current funding opportunity, but also to capitalizing on lessons that may help to scale up and sustain transfer student success in Florida in the future.

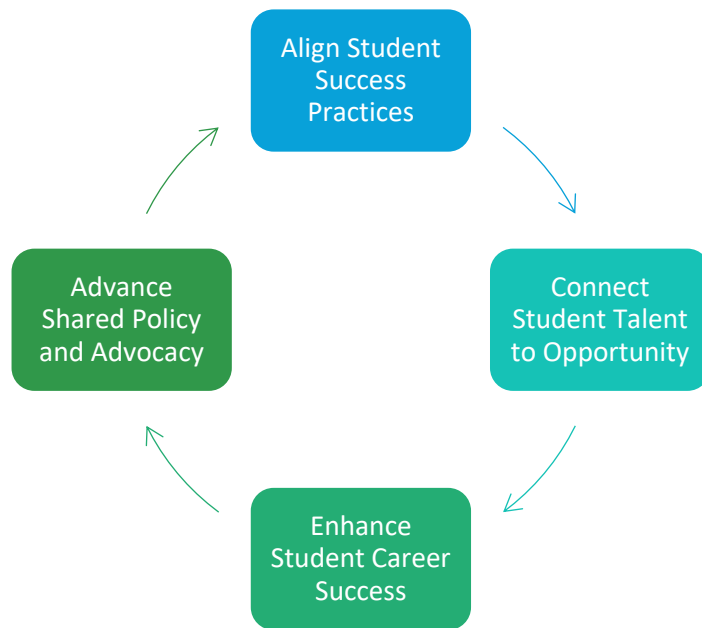
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# Introduction

This first annual evaluation report focuses on the Florida Consortium of Metropolitan Research Universities, also referred to as the Consortium in 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 identified as partner colleges in the Consortium.<sup>1</sup>

The Florida Consortium of Metropolitan Research Universities leverages the shared goals, interests, and commitments of FIU, UCF, and USF to improve student success. The Consortium utilizes a systems approach to advance its shared agenda to increase student success. Through the formal partnership forged by the three universities, the Consortium aligns practices to support student learning and development; connect student talent to opportunities through coaching, mentoring, and advising resources; enhance student career success through joint programming; and engage in shared policy and advocacy to extend the Consortium’s impact in the three metropolitan areas of Miami, Orlando, and Tampa.



It is important to note, Consortium leadership changed from Dr. Michael Preston to Mr. Scott Mauro during the 2023-24 academic year, resulting in Mr. Mauro taking the helm as “acting” Consortium director for most of the year. Having worked closely with Dr. Preston for two years prior to his departure, Mr. Mauro is providing consistent leadership to the Consortium, including conducting regular Zoom meetings with leaders of the University of Central Florida, where Mr. Mauro is employed; the University of South Florida, in Tampa; and Florida International University (FIU). There has also been some additional turnover of university leaders, though the majority of university leaders engaging in the Consortium are the same from 2022-23 (and even prior years) to 2023-24.

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<sup>1</sup> This report is prepared for the Florida Consortium of Metropolitan Research Universities and the Helios Education Foundation, a generous, multi-year funder.

This report summarizes the Florida Consortium’s goals, activities, and accomplishments for the 2023-24 fiscal year.<sup>2</sup> It features the Coaching Academy at UCF, the transfer student coaching and student scholarships at FIU, and the Articulation Platform Technology (APT) and plans for new research on transfer students at USF. These activities are evaluated in this fiscal year because they reflect the dedicated systems-level commitments of the three universities. However, it is important to recognize the Consortium has other noteworthy accomplishments in 2023-24, including the Florida Summit on Accelerating Transfer Success<sup>3</sup> held November 6, 2023, at USF in Tampa, and the National Student Success Conference held February 25-27, 2024, in Orlando, Florida. The Consortium also sponsored and/or executed additional initiatives to improve transfer outcomes for students matriculating from Florida College System (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. In addition, Helios funds also supported the first-ever Transfer Student Success Partnership Summit on March 8, 2024

## 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 contribute to college student success in Florida?*

Sub-questions examined for this 2023-24 annual evaluation report are:

- What strategies are employed across the Consortium to support and guide the Florida Transfer Success Network in 2023-24?
- What data are gathered, analyzed, and reported on Consortium strategies and solutions?
- What shared policy and advocacy are carried out by the Consortium?

Primary sources of data for this mixed methods evaluation come from the Consortium’s three research university partners (FIU, UCF, and USF), including documents, materials, and data shared with the evaluator. Participant observation of bi-weekly Zoom meetings involving the Consortium leadership, and attendance at Consortium meetings such as the Florida Summit on Accelerating Transfer Success. Data are also gathered via Zoom and face-to-face interviews when Consortium members reach important milestones.

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<sup>2</sup> Debra Bragg, Ph.D. is the external evaluator of the Florida Consortium of Metropolitan Research Universities and has also worked as the external evaluator of the Florida College System (FCS) Student Success Center, another Florida higher education initiative funded by the Helios Education Foundation.

<sup>3</sup> The 2024 Florida Summit on Accelerating Transfer Success will be held on Monday, Monday, October 28, 2024, on the University of Central Florida (UCF) campus.

Also, quantitative data are solicited from UCF and FIU on an annual basis to track the number of participants in the Coaching Academy Training at UCF and transfer coaching and scholarships at FIU. Descriptive statistics are presented for participants by institution and academic calendar year and cumulative total for the entire grant period.

## Results

Findings are discussed for the three Consortium member institutions in the following order:

- ⇒ The Consortium’s Transfer Summit
- ⇒ The Higher Education Coaching Academy Consortium Coaching Collaborative
- ⇒ Transfer Coaching and Student Scholarships
- ⇒ Articulation Platform Technology (APT)

### The Consortium’s Transfer Summit

An important annual event hosted by the Consortium is the Transfer Summit, last held on November 6, 2023, on the University of South Florida campus in Tampa. The Consortium website shows Summits on transfer student success have been held for six years under the title, *The Florida Summit on Accelerating Transfer Success*. Consistent with previous years, the November 2023 meeting involved professional personnel from all three partner universities (FIU, UCF, and USF), as well as Florida State College (FSC) partner institutions.

Table 1 shows the program agenda for the Summit, with numerous instances of the Metro Consortium universities and their FSC playing a central role in the meeting, including demonstrating how the three Metro research universities are engaging in transfer student success initiatives. Especially important to this work is the collaborative relationships formed and sustained by the three research universities and the FSC partner institutions, as noted below.

Table 1. Summit Program, Speakers, and Speaker Affiliation

| Program Event   | Speaker                                       | Affiliation            |
|---|---|------------------------|
| Introduction  | Michael Preston                               | Metro Consortium       |
| Welcome   | Fai Howard                                    | USF                    |
| Keynote   | Tonjua Williams                               | St. Petersburg College |
| Breakouts: 10:20 – 11:05am                                  |   |                        |
| Creating a Transfer student Culture of Care                 | Monika Castenada, Jennifer Bravo, Kenia Perez | FIU                    |
| Leveraging the Power of Technology to Unlock Transfer Shock | Dominic Vicino & Lizzie Allison               | EdVisorly              |

| Program Event  | Speaker  | Affiliation                                 |
|--|--|---|
| DCEED: Interactive Transfer Readiness Model  | Ashton Terry, Michael Holt, & Diana Pienaar  | CCEED                                       |
| <b>Breakouts: 11:10 – 11:55am</b>  |  |   |
| Creating a Transfer Receptive Culture  | Jill Brown, Camielle Crampsie, Tia Gomez Zeller, & Kevin Jeminez   | USF   |
| Removing Barriers to Non-traditional Transfer Students   | Lisa Johnson & Kristen Vanselow  | Florida Gulf Coast U (FGCU)                 |
| System Approaches to Pre- and Post-Transfer Students   | Harrison Oonge, Teresa Dorman, Farah Abass (UCF) Tommy Minton (Seminole)   | UCF<br>Seminole State College               |
| Keynote: Transfer Pathways in Florida  | Kimberly Lent Morales (Helios)   | Helios Ed. Foundation                       |
| <b>Breakout Sessions: 1:15pm – 2:00pm</b>  |  |   |
| Are Holds Really the Barrier to Retention?   | Brenna Whitton & Alyssa Dunlap   | USF   |
| Transferring into Research! Partnering to Connect State College and Recent Transfer Students to UGR at UCF | Natalia Toro & Darya Farsinejad (UCF)<br>Melonie Sexton (Valencia)   | UCF<br>Valencia College                     |
| Now to Next  | Maisha Wilder  | Valencia College                            |
| <b>Breakout Session: 2:15pm to 3:00pm</b>  |  |   |
| Student Panel: Transfer Student Stories  | Ellen Claude (FAU)<br>Shahd Dahbali (St. Petersburg)<br>Kyli Grote (St. Petersburg)<br>Vuk Pantovic (UCF)<br>Kettia Romage (FIU) | FAU<br>St. Petersburg College<br>UCF<br>FIU |
| Plenary Session: Final Remarks   | Michael Preston  | Metro Consortium                            |

Looking deeper, the program addressed a wide range of policies, programs, and concerns facing transfer students attending FCS partner colleges as well as transitioning to the Metro Consortium universities, and to other colleges and universities. Breakout sessions included traditional presentations as well as interactive workshop-style meetings. Topics ranged from creating a transfer culture of care to overcoming barriers to transfer student retention.

The Summit speakers were as diverse as the sessions in terms of their roles and titles at FCS partner colleges and universities. The Metro Consortium universities were very well represented, with 35 of the total 209 registrants (182 participants) from USF (the host campus), 28 from UCF, 14 from FIU. Other state universities included professionals from Florida Atlantic University (FAU), Florida Gulf Coast University (FGCU), Florida State University (FSU), and University of Florida. Among the FCS institutions, St. Petersburg College, Seminole State College, and Valencia College had participants as well as speakers, with three sessions



combining speakers from FSC partner institutions and the Metro research universities or other state universities. Added to the 2023 planning process, the Florida Summit Planning Committee created a Proposal Review Committee to rank and select presenters for the Summit. This committee was comprised of only FCS partners from the Consortium’s feeding institutions to add more of the FCS voice into the Summit.

Overall, the breadth of participation by professionals from the state universities and state colleges was impressive. Also positive was activities planned for participants to engage with one another, with future meetings possibly adding more time for active exchanges of ideas among participants on topics critical to transfer student success.

Looking deeper into job titles, the 209 registrants/participants came mostly from public Florida colleges and universities, though some private institutions were represented among the participants and a few participants came from out of Florida. The titles of president, vice president, provost, vice provost, or vice chancellor appeared in the titles of 11 registrants/participants, and the titles of dean or director, including assistant and associate levels, were found in the titles of 68 registrants/participants. The words advisor or coach appeared in the titles of another 48 registrants/participants, and the words success, support, advocate, advocacy, or engagement appeared in the titles of 27 registrants/participants. Other registrants were admissions officers and recruiters, faculty, librarians, and students at the undergraduate and graduate levels. Collectively, these registrants/participants represented wide range of positions relating to transfer student success, reinforcing the role the Summit plays in creating needed space to advocate for transfer student success in Florida.

Finally, it is important to note early registration has begun for the 2024 transfer summit, and early registrations have already exceeded attendance for the 2023 summit. The Consortium’s goal is to increase attendance by 20% year to year.

## **The Higher Ed Coaching Academy Consortium Coaching Collaborative**

The UCF Higher Education Academy is focused on students’ overall success – academic and holistic – and provides training specific to higher education coaching for higher education practitioners.<sup>4</sup> 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).

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<sup>4</sup> Funding in the amount of \$150,000 supports the *Consortium’s Coaching Collaborative* program and is part of a larger \$1.25 Million grant awarded to the Florida Consortium of Metropolitan Research Universities by the Helios Education Foundation.

A main goal of the Consortium’s Coaching Collaborative involves the Higher Education Coaching Academy training 500 participants employed by FIU, UCF, USF, and 16 Florida College System (FCS) colleges. The Consortium’s Coaching Academy program leaders include:

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

Beginning in Spring 2022, the Coaching Academy has been offered for an 8-week, 40-hour period each term to support academic professionals in using evidence-based results to enhance the academic success of students. The session is capped at 25 participants to maximize student engagement and learning, with some exceptions for individuals from the same work group or campus. Using active instructional strategies, the Academy’s training encourages shared learning and application of knowledge and skills in the collegiate workplace. Dr. Jenny Sumner who is Executive Director of the UCF Higher Ed Coaching Academy and an experienced UCF Success Coach is one of seven Academy instructors for the program.

Table 2 presents cumulative data from Spring 2022 through Fall 2023 on the UCF Higher Education Coaching Academy, which involved 334 participants from UCF, USF, and FIU, and the University of North Florida. Almost 200 Florida State College professionals have participated as well. These data also identify FSC partners by specific aspects of the transfer student success programs offered by the three university partners in the Metro Consortium, specifically, Connect4Success at FIU, Direct Connect at UCF, and FUSE at USF.<sup>5</sup>

Table 2. Number Completers of the UCF Higher Education Coaching Academy

| <b>Organization</b>                         | <b>Number Participants</b>   |
|---|------------------------------|
| <b>Florida Public Universities</b>          | <b>Spring 2022–Fall 2023</b> |
| University of Central Florida (Partner)     | 59                           |
| University of South Florida (Partner)       | 43                           |
| Florida International University (Partner)  | 35                           |
| University of North Florida (Other)         | 4                            |
| Total University Participants               | 141                          |
| <b>Florida State Colleges</b>               |                              |
| Miami Dade College (Non-Consortium)         | 78                           |
| College of Central Florida (Direct Connect) | 27                           |
| Broward College (Connect4Success)           | 23                           |

<sup>5</sup> Miami Dade College offered Coaching Academy training to Non-Consortium attendees and Connect4Success, which is a guided transfer pathway that helps students attend any Florida public or community college and get automatic admission to FIU at the end of their AA journey. Direct Connect at UCF guarantees admission for transfer students with an AA or articulated AS degree from a partner state college. FUSE is a transfer program between USF and eight Florida State Colleges that provides academic pathways for students to complete their associate degrees with guaranteed admission to specific majors.

|  |            |
|--|------------|
| South Florida State College (FUSE)             | 17         |
| Palm Beach State College (Connect4Success)     | 16         |
| Miami Dade College (Connect4Success)           | 13         |
| Eastern Florida State College (Direct Connect) | 3          |
| Polk State College (FUSE)                      | 3          |
| State College of Florida (FUSE)                | 2          |
| St. Petersburg College (FUSE)                  | 2          |
| Seminole State College (Direct Connect)        | 2          |
| Lake Sumner State College (Direct Connect)     | 2          |
| LEAP (FUSE)                                    | 2          |
| Daytona State College (Direct Connect)         | 1          |
| Valencia College (Direct Connect)              | 1          |
| Santa Fe College (Direct Connect)              | 1          |
| Total College Participants                     | 193        |
| <b>Grand Total</b>                             | <b>334</b> |

*Source: Dr. Jennifer Sumner, PowerPoint presentation slide titled, UCF Higher Education Coaching Academy, Completers from Spring 2022 to Fall 2023*

As noted above, these data reflect Coaching Academy participants through Fall 2023. Plans for training courses in 2024 and 2025 are shown in Table 3, with some training sessions held in Spring and Summer 2024 that are not reported here but will be included in the final report in summer 2025. However, the data shown in Tables 2 and the plans listed in Table 3 confirm all three research universities (FIU, UCF, and USF) and Florida State College partners will continue to have extensive involvement in the Coaching Academy through the end of the Helios grant.

Table 3. UCF Higher Ed Coaching Academy Plans and Dates for 2024 and 2025

| Year | Term   | Participants   | Participants        |
|------|--------|----------------|---------------------|
| 2024 | Spring | FIU + Partners | UCF (internal only) |
|      | Summer | USF + Partners | FIU + Partners      |
|      | Fall   | USF + Partners | UCF + Partners      |
| 2025 | Spring | FIU + Partners | USF + Partners      |
|      | Summer | UCF + Partners | FIU + Partners      |
|      | Fall   | USF + Partners | UCF + Partners      |

*Source: Dr. Jennifer Sumner, PowerPoint presentation slide titled, UCF Higher Education Coaching Academy, Looking Ahead*

Over the course of the Coaching Academy’s initial implementation in Spring 2022, an end-of-training survey has been administered. Of 256 Coaching Academy completers, 177 survey responses have been received, and these results have been overwhelmingly positive. When rating the level of agreement with nine statements focusing on various aspects of student success coaching, from 98 to nearly 100% of respondents indicated they agree or strongly agree. For example, to the statement of “I understand what Student Success Coaching is”,

99.41% of the 177 respondents selected agree or strongly agree. To the statement of “I understand the benefits that Student Success Coaches provide to students”, 99.40% of all respondents agreed or strongly agreed.

A second set of statements focused on the specific aspects of the training, including instruction, materials, etc. Again, of 256 Coaching Academy completers, 177 surveys were finished, with very strong positive responses. Aggregate responses on a Likert scale of agreement, with agree and strongly agree being the highest level of agreement, the 177 respondents survey results ranged from 94.54% for “This program held my attention”, to 99.54% for “The materials provided were helpful”. Collectively, these survey responses indicate a strong, positive experience of nearly all Coaching Academy respondents, extending to the primary content of the training as well as the process by which the training was offered.

### ***Daytona State College Experience with Academic Coaching***

To delve more deeply into the experiences of a Florida State College partner in the Coaching Academy, an interview was conducted with Dr. Michelle Goldys, Associate Vice President (AVP) of Daytona State College (DSC). At the recommendation of Dr. Jennifer Sumner, Dr. Goldys agreed to participate in a 30-minute interview to discuss her experience and the experiences of her colleagues with the Coaching Academy and other relationships with UCF and the Florida Consortium of Metropolitan Research University.

The interview with Dr. Goldys surfaced valuable information about numerous aspects of the UCF Higher Education Coaching Academy, including curriculum, format, and perceived impact. This interview also provided insights into how an FSC partner is integrating academic coaching into multiple student support/success functions. Some of the most salient points from this interview are summarized below:

**DSC’s Strong Partnership with UCF:** DSC has a strong partnership with UCF, highlighted by Direct Connect, which facilitates seamless transfer for DSC AA students to UCF. Effective communication and coordination were highlighted as pivotal to students’ entire transition process works in attending the two institutions. DSC and USF professional staff meet regularly to provide updates. These on-going exchanges help sustain a working relationship that ensures the two organizations operate in concert, which is foundational to transfer student success.

Speaking to the importance of DSC’s partnership with UCF to transform advising and coaching, Michelle Goldys observed:

*We've worked very closely with UCF. They are amazing partners. We meet annually, especially because of the Direct Connect relationship... We meet in several different capacities with different groups of people all throughout the year. They communicate extremely well about updates and changes, improvements, things like that. They've had their success coach model in place for quite some time and so, if a student says I'm interested in UCF, we immediately have them fill out the Direct Connect profile, and then*

*their success coaches immediately start communication as well. We work in tandem with them. They offer touch points and training for us throughout the year so that we can make sure that relationship stays strong. We're getting students connected to them immediately so they can start guiding them to a seamless transfer.*

**The Evolution of Academic Coaching at DSC:** DSC's academic coaching function has evolved over the last six years. Beginning when Dr. Goldys was introduced to academic coaching through a UCF Success Coach boot camp in 2018, there has been a steady development of professional expertise and organizational change to implement academic coaching at DSC, including recognition by the AVP at an initial boot camp that DSC would need a dedicated function of academic coaching separate from traditional academic advising. From that point, the AVP implemented academic coaching by training and transitioning advisors to academic coaching and creating a dedicated framework for DSC that is unique to the college's needs but also modeled off of the UCF's prior work and experience.

**Development and Implementation:** Dr. Goldys' doctoral research focusing on academic coaching was instrumental in developing academic coaching at DSC. An important impetus for these effort included a proposal for DSC's Quality Enhancement Plan (QEP) focusing on academic coaching. This QEP was accepted by the campus leadership and has ultimately, received recognition for its contributions to DSC's successful accreditation visit with the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC). A critical outcome of the QEP was the establishment of an academic coaching team at DSC that is integrated into the advising suite.

**Theory to Practice Training and Frameworks:** The AVP highlighted the importance of training advisors in coaching techniques and theoretical frameworks that they may not be familiar with, especially if these professionals have not been trained in higher education theory. The UCF Higher Education Coaching Academy was lauded for providing significant theoretical and conceptual support to implement academic advising on the DSC campus. By focusing on student development theories like mattering and marginality, professionals utilizing academic coaching develop and deploy the knowledge and deeper understanding of students to help them succeed, including empathetic listening and proactive student support.

**Practical Applications to Student Success at DSC:** Academic coaches at DSC engage with students from the start, helping them navigate the college's resources and addressing needs that may impinge on student success. The coaches reach out to students who apply but do not follow through with enrollment, aiming to understand their motivations and challenges, and providing necessary support. Along with the coaches, academic advisors assist the students with scheduling and other core academic functions. Together, coaches and advisors provide support for student success that was not necessarily happening in traditional approaches to student services.

Moreover, the theory and practical applications underlying academic coaching extend beyond advising, according to Rabecka Collins, Director of Falcon Hope Center. As leader of this center,

which strives to meet the life needs of diverse learners attending DSC, including students who are homeless and food insecure, as well as foster youth. Ms. Collins sees applications of academic coaching for mentors who play a key role in providing services and supports for these students. Having completed the Coaching Academy, Ms. Collins shared her excitement about offering academic coaching training to her staff. She observed,

*I would love for my team to be trained [in academic coaching] as well because, as director of the Hope Center, we have a food pantry and clothing. We provide school supplies, just different resources for students... We're dealing with students who are homeless foster youth, or maybe they're student parents. They're just coming from all areas. And so, I feel like having that type of training for our team would make us more effective as we're working with the students.*

In discussing the application of academic coaching for transfer students at DSC who intend to transfer to UCF, Ms. Collins spoke with optimism about the future. She suggested,

*It's going to be a different environment for them... We're preparing them to be independent thinkers, instilling those questions and thought patterns. [We're] moving them from a fixed mindset to a growth mindset, and we're kind of doing that early on. Maybe the outcome would be the same, but I just personally think maybe we could have better prepared them in the long run if we had some of these techniques.*

**Continuing Collaborative Efforts:** Dr. Goldys described ongoing efforts to refine the coaching process, recognizing that DSC is in process of transforming student success. For example, as coaches receive feedback from students, they use data to identify common challenges and formulate solutions. They collaborate across departments to improve student services, and they engage in collaborative improvements in concert with UCF. Through proactive measures to support students, such as explaining processes clearly and connecting students to campus resources like childcare grants and tutoring services, DSC seeks to center students and fully integrate student success into the college culture, with academic coaching being integral to this college-wide transformative process.

## **Transfer Coaching and Scholarships**

Transfer Coaching at FIU focuses students who have transferred to the university who are thought able to benefit from personalized guidance from a dedicated transfer coach. In addition, scholarships are available to transfer students who demonstrate financial needs that could impede completion of the last year of college. To be eligible for transfer coaching and the scholarship, transfer students with an Associate of Arts (AA) from the Florida College System (FCS) must be currently enrolled at FIU and have a 2.0 or higher cumulative grade point average (GPA). Ideally scholarship candidates would be within 85-87 accumulated credits, however FIU has awarded scholarships to students outside these parameters.

FIU transfer students targeted for transfer coaching and scholarships fit one or more of the following categories:

- Transfer student with AA (unfunded)
- Transfer student from an FSC
- Transfer student who did not complete an AA
- Transfer student from a FL state university
- Transfer student from a FL private university
- Transfer student from an out of state college
- Transfer students from an out of state university

Trained by the *Consortium’s Coaching Collaborative*, FIU’s Transfer Success Coach (TSC) works directly with transfer students to help them set and achieve their academic and career success goals. Students are coached in how to identify and remove barriers to their success by leveraging their strengths and providing resources to help reduce attrition and maximize on-time graduation. Topics and tools utilized by the TSC coach are listed in Table 4.

Table 4. FIU Transfer Success Coaching Topics and Tools

| Transfer Coaching Topics  | Transfer Coaching Tools  |
|---|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Adjusting to FIU campus life</li> <li><input type="checkbox"/> Identifying goals</li> <li><input type="checkbox"/> Time management</li> <li><input type="checkbox"/> Study strategies</li> <li><input type="checkbox"/> Motivation</li> <li><input type="checkbox"/> Managing obstacles</li> <li><input type="checkbox"/> Evaluating progress towards academic/career goals</li> <li><input type="checkbox"/> Post-graduation planning</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Appreciative inquiry</li> <li><input type="checkbox"/> Reflective inquiry</li> <li><input type="checkbox"/> SMART goals</li> <li><input type="checkbox"/> Priority matrix</li> <li><input type="checkbox"/> Wheel of Life</li> </ul> |

The TSC helps transfer students to see a wide range of opportunities that may emerge during their studies at FIU and navigate challenges that may get in the way of timely graduation. Opportunities and challenges associated identified by the TSC are listed in Table 5.

Table 5. Transfer Success Coaching on Opportunities and Challenges

| Transfer Success Opportunities   | Transfer Success Challenges   |
|--|---|
| <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> </ul> | <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> </ul> |

| Transfer Success Opportunities  | Transfer Success Challenges  |
|---|--|
| <ul style="list-style-type: none"> <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> | <ul style="list-style-type: none"> <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> |

During the 2023-24 year, the Transfer Coach hosted a number of events and activities, including a lunchtime session on “Keys to Success” held Wednesday, January 11 from 12-1pm, and a “Meet and Greet” also held January 11 on campus at the Graham Center.

In addition, the Transfer Coach offered a “Keys to Success: FIU College Life Coaching” session designed to help students plan for success through time management, studying strategies, self-care, and building relationships. Finally, illustrating the extent to which transfer student success is a top priority, reaching the Transfer Coach is easy for students at: [coaching@fiu.edu](mailto:coaching@fiu.edu)

### ***Transfer Outreach, Engagement, and Coaching***

The **FIU College Life Coaching**, also referred to as **Transfer Coaching**, is offered at three levels. The first level focuses on outreach and referral to ensure transfer students have some knowledge of and access to transfer coaching, if they choose to engage. Second, the transfer coach offers modest engagement to provide transfer students with information and begin to address unmet needs or concerns, but this level of coaching does not go into the depth of the third level, which is referred to as college life coaching. At this level, transfer students are more engaged with the transfer coach, sometimes meeting over a number of weeks or months (or in a few cases over multiple terms and years). Even at this third level, the intensity of coaching varies from person to person, depending on what the students need. Sometimes the coaching involves a relatively “light touch” and other times it is more extensive.

Looking at these three categories of outreach, engagement, and coaching, from the time transfer coaching was offered at FIU in summer 2022, the FIU Transfer Coach has amassed a large portfolio of student participants. Table 6 shows the total number of students involved in outreach, engagement and/or coaching, with some students participating in more than one category over time. We do not attempt to separate out these participants because of the evaluator’s lack of access to individual student records, as is appropriate to abide by FIU’s student confidentiality requirements. It is also logical that students would move from one level to another and because the support services, including coaching, is necessarily different, it seems maintain a cumulative count of these student instances.



Also, important to note in Table 6 is that the total number of transfer students receiving coaching in 2023 and/or 2024 was 111, based on the data provided by the transfer coach to the evaluator.

Table 6. Number FIU Students Involved Outreach, Engagement, and Coaching

| Levels of Engagement/Coaching                    | Cumulative Number Students |
|--|----------------------------|
| Outreach, including self-referral, unit referral | 1302                       |
| Engaged with in transfer coach                   | 150                        |
| Transfer Coaching (Life coaching)                | 111                        |

In 2023, 81 transfer students received coaching from FIU’s transfer coach separate from receiving scholarships as these students are described below. This number rose to 91 total students coached in 2024, with some students continuing from 2023 and 2024 and counted in both years. Table 7 provides a breakdown of the numbers of students coached by term and whether the students were unfunded or funded, referring to the transfer scholarship.

Table 7. The Number of Students Coached by Term and Funding Status

| Term                     | Number of Unfunded Students Coached | Number of Funded Students Coached |
|--------------------------|-------------------------------------|-----------------------------------|
| 2023 Summer              | 17                                  | 1                                 |
| 2023 Fall                | 30                                  | 1                                 |
| 2024 Spring              | 30                                  | 0                                 |
| 2024 Summer*             | 1*                                  | 0*                                |
| 2023-2024 Academic Year* | 57*                                 | 2*                                |

*\*Based on 5/10/2024 data provided by FIU, with a note that these counts are incomplete and include some students who returned multiple semesters for coaching services.*

**Transfer Scholarships**

Students receiving funding from FIU increased by six in 2024. These students may also be coached but they need not be part of coaching to receive a scholarship. As noted in Table 8, the students receiving funding are a diverse group who are enrolled in their last year of college. They receive funding from FIU ranging from \$400 to nearly \$2000 (median of \$1000) to support their completion of a bachelor’s degree.

Table 8. Characteristics of FIU Transfer Scholarship Recipients

| Student Characteristics | 2023                      |         | 2024                         |         |
|-------------------------|---------------------------|---------|------------------------------|---------|
|                         | 23 Scholarship Recipients |         | 6 New Scholarship Recipients |         |
|                         | Number                    | Percent | Number                       | Percent |

|                         |             |     |             |      |
|-------------------------|-------------|-----|-------------|------|
| Women                   | 13          | 61% | 5           | 83%  |
| Men                     | 9           | 39% | 1           | 17%  |
| Racially Minoritized    | 21          | 91% | 6           | 100% |
| AA Transfer             | 22          | 96% | 5           | 83%  |
| Full-Time Enrolled      | 22          | 96% | 3           | 50%  |
| Pell 1st Year           | 10          | 43% | 1           | 17%  |
| Avg Cumulative GPA      | 3.21 / 4.0  |     | 3.38/4.0    |      |
| Range Cumulative GPA    | 2.15 - 3.98 |     | 2.78 – 3.83 |      |
| Avg Transferred Credits | 66          |     | 67          |      |
| Avg Cumulative Credits  | 115         |     | 89          |      |

*Note:* This table reports data reported to the evaluator by FIU. Some data were unavailable for two transfer scholarship recipients in 2023 and one transfer scholarship recipient in 2024.

Table 9 provides a description of the academic programs of the FIU scholarship recipients in 2023 and 2024. The much smaller group in 2024 includes students enrolled in programs in Arts, Sciences, and Education, International and Public Affairs, Nursing & Health Sciences, and Hospitality Management.

Table 9. Academic Programs of FIU Transfer Scholarship Recipients

| Academic Program                               | 2023<br>Scholarship<br>Recipients<br>(Total 23) | 2024<br>New Scholarship<br>Recipients<br>(Total 6) |
|--|---|--|
| Arts, Sciences & Education                     | 7   | 3  |
| Business Administration                        | 6   | 0  |
| Green School of International & Public Affairs | 4   | 1  |
| Communications, Architecture & the Arts        | 3   | 0  |
| College of Nursing & Health Sciences           | 0   | 1  |
| Hospitality Management                         | 1   | 1  |
| Engineering                                    | 1   | 0  |
| Non-Degree                                     | 1   | 0  |

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

Importantly, FIU’s transfer coaching is integrated with other units that center their work on student success is shown in Table 9. Partners and collaborators 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 10. Internal and External Partners and Collaborators for FIU Transfer Coaching

| Internal to FIU  | External to FIU   |
|--|---|
| <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> | <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> |

Looking ahead to 2024-25, FIU is engaged in research activities, including focus groups with transfer students, to gain a fuller and deeper understanding of how transfer is working (or not) at FIU. This study will dig deeper into the transfer student coaching process, including scholarships awarded to advanced students to help support their completion of the bachelor’s degree at FIU. Results of this report in the final report for the Metro Consortium in summer 2025.

## Articulation Platform Technology and Transfer Research

During the 2023-24 academic year, the Metro Consortium and USF continued to benchmark and research technology for the APT, including forming representative work groups and a selection committee comprised of USF professionals in admissions, registrar, IT, IR, and transfer. With that input, USF opened an ITN for solicitation, but later decided to close it to better align this effort with USF’s overall university technology needs.

Subsequent activities at USF identified a “tech” that the University believes better meets the original transfer articulation needs while also supporting time-to degree completion for students, with curricular analytics. These analytics identify patterns of student progression that slow or stop (i.e., bottleneck) on their path to securing a degree. The curricular analytics also identify other inefficiencies and complexities that negatively impact student progression and timely completion. With this advantage clearly identified, USF decided to re-set to secure this tech through a process that is underway at the present time. Once secured, USF intends to expand this project to all undergraduate students by cohort, allowing for interventions and targeting support in advance of typical markers leading to stop out or delayed completion. Dashboards associated with this tech can be used to determine which classes students need to get back on track or what courses need to be offered for timely graduation. As a final step, USF has recommended a vendor tech with the capacity to address transfer articulation with curricular analytics in this way. A decision to move forward with this contract is forthcoming. More details on the status of the ATP are included in the Consortium’s report submitted by Mr. Scott Mauro on July 25, 2024.

In addition, USF worked collaboratively with the Metro Consortium leadership to launch a research project on transfer, utilizing Hanover Research. Helios funds are being used to conduct qualitative and quantitative research on transfer students from USF's top two feeder FSC colleges. The purpose of this research is to aid in filling existing gaps in predictability models, inform the selection of the ATP, provide a better understanding of barriers and challenges in the student journey from the FCS colleges to USF. Student voice will be emphasized in this research to inform USF's transfer student success work. The timeline for this new aspect of USF's scope of work with the Helios grant shows the study will be completed by summer 2025. As with all aspects of research and evaluation associated with the Consortium, lessons learned from this study will be shared with other university and FSC partners.

## Take-Aways

This report provides a description of key activities implemented during 2023-24, including the annual transfer summit, the Coaching Academy led by the University of Central Florida (UCF), transfer coaching and scholarships awarded by Florida International University (FIU), and the Articulation Platform Technology (APT) and transfer research led by University of South Florida (USF). Important findings on this year's scope and accomplishments are:

- ⇒ Held annually, the **Florida Summit for Accelerating Transfer Success** continues, involving over 180 participants in the November 6, 2024, all-day event held at the University of South Florida (USF). The robust agenda involved speakers from FIU, UCF, and USF, as well as Florida State College (FSC) institutions. Additional speakers and participants attending the Summit came from other Florida public and private universities, as well as FSC institutions not counted among the formal list of 16 FSCs. It is also noteworthy that early registration has begun for the 2024 transfer summit, and these registrations already exceed 2023 summit attendance.
- ⇒ Funded by the Consortium, the **Coaching Academy** led by UCF and the Helios Transfer Success Grant continues to grow in training higher education professionals affiliated with the university and FSC partners. Up to January 2024, the Academy had trained 334 professionals from the three partner universities, as well as FSC partner colleges. Consortium data documenting participants to the present time reveals this number to be 556 to date. Consistent with the end-of-training survey results presented in the 2023 evaluation report, feedback on the coaching training was very positive. Both content and format were praised by participants for their relevance and applicability to institutional efforts to increase student success, particularly transfer student success. Also presented in this report are insights from leaders at Daytona State College (DSC) on how theory and practice they learned in the Coaching Academy is being deployed to reform, restructure and invigorate academic coaching and advising to enhance student success.
- ⇒ Building on UCF's Coaching Academy training, FIU is working to enhance transfer student efforts with a dedicated **Transfer Coach and scholarships**. Cumulatively, the

transfer coach documents 1302 FIU transfer students who have been involved in outreach and a modest level of engagement, 150 FIU transfer students who have had more extensive engagement, and 111 FIU transfer students who have participated in coaching. These numbers include some duplicate counts because some students participate in coaching over the course of multiple years. In addition, a total of 29 FIU transfer students have received a scholarship to help them navigate the last year of their studies and complete their degree. Six of these students receive a scholarship during the 2023-24 academic year. Students engaging with the transfer coach on some level, from referral to more active engagement to coaching and finally to scholarship, take a wide range of majors, completing bachelor's degrees in programs of study across the university.

- ⇒ The **Articulation Platform Technology (APT)** and transfer research projects conducted at USF involve outside vendors, with a new contractual arrangement emerging at this time to secure “tech” for the APT. Limited information is available due to on-going review processes conducted by USF to be able to appropriately award the contract. In addition, USF has recently contracted with Hanover Research to study transfer student success, with results of available from this project in summer 2025, just prior to the conclusion of the Consortium's Helios grant.

In conclusion, the Consortium continues to engage the three partner universities and 16 FSC institutions in various initiatives designed to improve transfer student success. Among these is the UCF Higher Education Coaching Academy *Consortium's Coaching Collaborative*, the FIU transfer coaching and scholarships, and the Articulation Platform Technology (APT) and transfer research led by USF. Other initiatives integral to the Consortium include the annual *Summit on Accelerating Transfer Success*, as well as other efforts to improve transfer policies and practices on each partner university campus and extending more widely to higher education Florida. As the Consortium approaches its final year, ending the current grant in summer 2025, it will be important to document even more fully and explicitly how the Consortium is influencing transfer student success within and across the partner universities and FSC schools. Being able to evaluate the Consortium's influence on transfer student success is important to fulfilling the current funding opportunity, but also to capitalizing on lessons that may help to scale up and sustain transfer student success in Florida in the future.