July 14, 2017

Dear Student Success Center Executive Directors and Partners:

We are looking forward to seeing you in Ft. Lauderdale on July 18th for CCRC’s second workshop on the Scale of Adoption (SOA) assessment process. This workshop will focus on how to conduct the follow-up interviews with colleges after they complete the SOA assessment and how to synthesize and use this information for planning, coaching, and improvement purposes.

Before the workshop, we’d like you to review the following documents, in the order they are listed below. All documents are available in the attached folder. Here’s a rundown of the advance reading and why we included each piece.

1. **Scale of Adoption (SOA) template (Blank)**
   This is a recently revised version of the SOA template developed by CCRC in which the fourth practice area, *Ensuring That Students Are Learning*, has been updated based on our research and input from colleges. The template can be customized to include your SSC’s or agency’s logo, contact details and any other information you may want to communicate to your colleges.

2. **Sample SOA report (Completed)**
   We have created an example of a fairly typical completed SOA report that shows sample responses from a college. A completed SOA report provides valuable information about what a college is doing that is further supplemented by the conversations that take place during follow-up calls. As you’re reviewing this template, note what information is unclear, incomplete or missing, and what questions you would ask if you were doing a follow-up call with this college. (Please note that the format as well as some of the items in fourth practice area in these templates differs from the “new and improved” blank SOA template we have provided.)

3. **Follow-up call notes & protocol template (Blank)**
   This is the interview protocol that CCRC researchers use to conduct follow-up calls with colleges about their SOA reports. The first section will take you through a script and the steps involved in conducting a follow-up call. The second section includes the note-taking template used by CCRC researchers.

4. **Sample Follow-up Call Notes (Completed)**
   Here is a sample of a completed notes template. Follow-up call notes should be detailed and include as much information from the call as possible. (You will therefore ideally want to have a note taker or record the interviews.) The notes and additional comments show the level of detail that follow-up calls go into, as well as examples of the sorts of issues on which it is appropriate to ask probing questions. Again, note that the fourth
practice area in these samples differs slightly from the blank new SOA template we provided.

5. **Pathways Practice Indicators**
   Based on the SOA template and the broad practice areas, CCRC has developed a list of indicators that break down every essential practice into more specific practices. This detailed list will give you a sense of what it would look like for a college to have fully implemented a particular essential practice. This tool is particularly useful during the follow-up calls in formulating probing questions for the college teams and ensuring that they understand the scope of the essential practices. These indicators can be particularly useful when a college states that they are “at scale” or “done” with a practice when in fact it seems that they are not.

6. **Common challenge areas/sample follow-up questions**
   Like the pathways practice indicators (#5 above), this document will help you prepare to conduct the follow-up interviews. Here, we listed some common “challenge areas” for colleges implementing pathways, and have provided some sample follow-up questions. These questions are designed to help you dig into what the college is doing, and to push them to think about how to take their existing practices to scale.

7. **“Megatemplate” (Blank)**
   After completing the follow-up calls, the megatemplate is used to summarize where all the participating colleges stand in their efforts to implement each essential practice at scale. It also helps in tracking the progress of colleges through different rounds of SOA assessments. Colleges also use the mega template to reach out to other institutions that are further along in a given practice to seek guidance on a particular practice they want to develop or are struggling with.

8. **Sample Summary Memo**
   This sample memo provides a summary analysis of the information collected through the SOA templates and follow-up calls, and highlights areas where colleges are making progress and where they still have work to do. This analysis is important for taking stock of the progress to date among all participating colleges and for determining future programming, technical assistance, and coaching needs. Thanks, Michigan SSC for sharing your memo!

9. **Implementing Guided Pathways: Early Insights from the AACC Pathways Colleges (Jenkins, Lahr, & Fink, 2017)**
   Published by CCRC in April, this report is a detailed analysis of the efforts by the 30 AACC Pathways colleges to plan and implement pathways reforms during the first year of the project. The report includes detailed descriptions of the practices adopted by colleges in implementing pathways as well as strategies they have used to implement pathways and overcome barriers. We believe it will be a useful resource in preparation for conducting follow-up calls with colleges. It has also been a useful resource to

During the workshop, we will review these materials and conduct practice follow-up calls. During the interview activity, you’ll be paired up with one other state and a national partner. You and the other state will practice being the interviewer, and the national partner will pretend to be a college in your state. Familiarity with the pre-reads materials (especially #2 – 6) will help you make the most of this experience.

In addition to going through the pre-reads, we would also like you to think about these questions on your way to the meeting:

- What is your state’s timeline for administering the SOA and conducting the interviews?
- How many colleges will be involved in the process?
- Who will conduct the calls, take notes, and write up the findings? What are your capacity needs?
- How will the interviewers be trained and what kind of support will you require?

We look forward to seeing you in Ft. Lauderdale!

Hana and Davis