

Evaluation of RevUp's Coaching Initiative

Provided by InsideTrack, Inc.

I. Executive Summary

What was the initiative? As part of the \$25 million-dollar RevUp Montana initiative, five Montana colleges provided coaching services to their students in an effort to improve student retention rates.

What were the results? 2,429 total students received coaching services over a three-year time period from InsideTrack, an Oregon-based provider of professional one-on-one coaching services. Coached students were retained at a rate that averaged 9.1% higher than non-coached students during the same time period, equating to an additional 335 students retained and generating an estimated additional \$6.25 million in revenue across those five institutions.

What are the implications? Despite widely varying levels of impact and differing return-on-investment across participating institutions, the use of professional coaching as a means of increasing student retention appears to be both effective, increasing student fall-to-fall retention by an average of 8.3%, and cost effective, returning an average \$2.30 net for each dollar spent providing the service.

II. Background on the Initiative

InsideTrack, an Oregon-based company, provides remote coaching services to students. Through sophisticated but informal interactions, coaches identify individual barriers to each student's success and help students proactively address those barriers. InsideTrack customizes services to each institution with coaches often seamlessly connecting students to personnel on each campus that can help provide additional assistance. InsideTrack is also able to analyze information gathered from students to help institutions identify trends and common areas where students are struggling.

III. Initial Goals

The five campuses that participated in RevUp's coaching initiative identified the following estimates for how many students would be coached during the project: City College Montana State University Billings (MSUB) – 225; Flathead Valley Community College (FVCC) – 185; Great Falls College Montana State University (GFC MSU) – 225; Missoula College 213, and Montana State University Northern (MSUN) – 120 (968 Total).

The RevUp management team, seeking to pilot this service with as many students as possible, drafted a contract with InsideTrack that aimed to serve as many as 2,625 Montana students. The price of the services was \$1.89 million over 3 years. InsideTrack's official goal was to increase student fall-to-fall retention by 3% over each institution's historic retention levels.

IV. Adjustments/Challenges/Road Blocks

While establishing the contract, the Office of the Commissioner of Higher Education (OCHE) requested that students be required to opt-in to coaching services. This was against InsideTrack's normal operating procedures because the students most in need of support also tend to be the least likely to seek it out proactively. The opt-in process had two impacts as InsideTrack coaches had to spend additional time gaining student opt-in: (1) students that engaged in coaching, engaged later in the term reducing the impact of the service, and (2) the students at-risk of dropping out tend to also not proactively seek support, meaning that InsideTrack was mainly serving students that were likely to be retained anyway. After recognizing this unintended consequence, colleges were encouraged to adopt an opt-out policy and offer the service to all first-time, full-time students. All colleges except



for FVCC heeded that recommendation. Four colleges began implementing coaching in Spring '14. Missoula College did not initiate coaching until Spring '15.

V. Outputs

2,429 students were coached between November 2013 and December 2016 which included 20,993 contacts made with students. The cost per coached student was roughly \$781.

VI. Outcomes/Impacts

The group of coached students exhibited a fall-to-fall retention rate 9.1% higher (60% versus 50.9%) than non-coached students during this same time period and 4.6% higher than historical retention levels (60% versus 55.4%). For financial comparisons, an average of each institutions non-coached and historic retention rates was used as a means of providing a more conservative estimate of impacts in the RevUp analysis.

Table 1: Impact of Coaching on Retention and Retention Rate by Institution

	Students Coached (N)	Non-Coached Students (N)	Historic Retention Rate	Non-coached Yr. 1 Retention	Non-coached Yr. 2 Retention	Coached Yr. 1 Retention	Coached Yr. 2 Retention	Avg. Non-coached + Historic	Avg. Coached	Average Difference	Estimated Additional Students Retained
City College	465	537	52.50%	50.30%	49.50%	55.20%	58.00%	50.77%	56.60%	5.83%	28
FVCC	241	na	52.60%	46.10%		63.30%		49.35%	63.30%	13.95%	79
GFC MSU	710	732	54.50%	49.70%	38.00%	59.20%	55.70%	47.40%	57.45%	10.05%	74
Missoula/BC	484	na	57.30%		45.60%		61.40%	51.45%	61.40%	9.95%	135
MSUN	529	485	63.20%	64.30%	59.30%	69.80%	62.40%	62.27%	66.10%	3.83%	19
Average	486	585	56.02%	52.60%	48.10%	61.88%	59.38%	52.25%	60.97%	8.72%	67

* Average difference adjusted to 8.30% when size of cohorts taken into account

Table 2: Return-On-Investment of Coaching Calculation by Institution

	# FT/FT Students	Retention Rate Average*	Students Retained Semester 2	Tuition, fee and FTE per semester	\$ Generated FT/FT Semester 2	Students Retained Semester 3&4	\$ Generated FT/FT	Students Retained Semester 5&6	\$ Generated FT/FT	Total Revenue - 3 Cohorts	Total Revenue Difference	Total Cost (\$720 per FT/FT student)	Net Revenue Differential
Coaching Model													
City College	256	56.60%	145	\$3,305	\$478,881	145	\$957,763	79	\$523,098	\$5,879,225	\$705,148	\$552,960	\$152,188
FVCC	232	63.30%	147	\$3,170	\$465,534	147	\$931,067	86	\$545,205	\$5,825,416	\$1,484,295	\$501,120	\$983,175
GFC MSU	191	67.50%	129	\$2,965	\$382,263	129	\$764,525	78	\$463,807	\$4,831,784	\$1,652,460	\$412,560	\$1,239,900
Missoula/BC	342	71.35%	244	\$4,519	\$1,102,713	244	\$2,205,426	158	\$1,424,352	\$14,197,472	\$4,586,388	\$738,720	\$3,847,668
MSUN	237	66.10%	157	\$3,861	\$604,853	157	\$1,209,705	102	\$783,849	\$7,795,220	\$538,560	\$511,920	\$26,640
Comparison Model													
City College	256	50.77%	130	\$3,305	\$429,527	130	\$859,053	66	\$436,113	\$5,174,078			
FVCC	232	49.35%	114	\$3,170	\$362,940	114	\$725,879	57	\$358,221	\$4,341,121			
GFC MSU	191	47.40%	91	\$2,965	\$268,433	91	\$536,867	43	\$254,475	\$3,179,324			
Missoula/BC	342	51.45%	176	\$4,519	\$795,159	176	\$1,590,317	91	\$818,218	\$9,611,083			
MSUN	237	62.27%	148	\$3,861	\$569,775	148	\$1,139,551	92	\$709,560	\$7,256,661			
Total											\$8,966,851	\$2,717,280	\$6,249,571
Average											\$1,793,370	\$543,456	\$1,249,914

*Historic rate averaged with '14, '15 non-coached cohort retention rate

ROI = \$2.30

Details on the calculations of tables is provided in Appendix 1

VII. Implications

Given the breadth of return-on-investment amongst institutions, it is important that all campuses conduct careful analysis; however, the use of professional coaches seems to have both positive outcomes on student retention and be a wise financial investment. Across the five campuses that piloted the service, our calculations indicate



that for every \$1.00 spent on coaching, the Montana University System (MUS) is likely to net \$2.30 in tuition, fees and Full Time Employee (FTE)-based revenue.

Should the average experiential retention rate increase (+8.3%) be applied to all First Time/Full Time (FT/FT) students at Montana's two flagship universities over a three-year period of time, the University of Montana would stand to retain an additional 230 students and increase net revenue by **\$4,219,029**, while Montana State University would retain an additional 597 students and increase revenue by **\$12,323,994**.

RTI Inc., RevUp Montana's third-party evaluator, will conduct an independent return-on-investment analysis of coaching using propensity score matching.

VIII. Current Plans for Sustainability

At this point, no MUS institutions intend to continue or begin a relationship with InsideTrack, Inc.

Several RevUp institutions (Great Falls College MSU, Missoula College, and City College MSUB) used grant funds to train some internal staff on aspects of the framework used by InsideTrack coaches. Great Falls College intends to hire and train its own coach. It will be interesting to see if either the InsideTrack-led trainings or independent coach position have an impact on campus retention rates.



Table 1: Retention Rate Calculations

	Students Coached (N)	Non-Coached Students (N)	Historic Retention Rate	Non-coached Yr. 1 Retention	Non-coached Yr. 2 Retention	Coached Yr. 1 Retention	Coached Yr. 2 Retention	Avg. Non-coached + Historic	Avg. Coached	Average Difference	Estimated Additional Students Retained
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Average	486	585	56.02%	52.60%	48.10%	61.88%	59.38%	52.25%	60.97%	8.72%	67

** Average difference adjusted to 8.30% when size of cohorts taken into account*

The mean of the retention rates for two cohorts of non-coached students and each institutions historic retention rates were calculated to use as the comparative retention rate for each institution. This somewhat inexact rate was chosen to mitigate the impacts of several trends which likely impacted retention rates during the project period. These trends included: (1) a decline in overall institutional retention rates during the project period (dropping roughly 5.1% on average for these institutions) limiting a meaningful simple comparison to the historical retention rates; (2) the implementation of two interventions (coaching and the hiring of workforce navigators) that likely buffered the decline in #1 by retaining students that would have otherwise contributed to a more significant retention rate decline, and (3) the limitations of comparing coached to non-coached students alone, given the likelihood of coached and non-coached populations having different aggregate characteristics regardless of the intervention.

	# FT/FT Students	Retention Rate Average*	Students Retained Semester 2	Tuition, fee and FTE per semester	\$ Generated FT/FT Semester 2	Students Retained Semesters 3&4	\$ Generated FT/FT	Students Retained Semester 5&6	\$ Generated FT/FT	Total Revenue - 3 Cohorts	Total Revenue Difference	Total Cost (\$720 per FT/FT student)	Net Revenue Differential
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MSUN	237	66.10%	157	\$3,861	\$604,853	157	\$1,209,705	102	\$783,849	\$7,795,220	\$538,560	\$511,920	\$26,640
U of MT	1179	66.900%	789	\$4,559	\$3,595,916	789	\$7,191,832	505	\$4,608,382	\$46,188,388	\$6,765,669	\$2,546,640	\$4,219,029
MSU - Boz	2858	75.300%	2152	\$4,873	\$10,487,057	2152	\$20,974,113	1560	\$15,201,618	\$139,988,363	\$18,497,274	\$6,173,280	\$12,323,994
Comparison Model													
City College	256	50.77%	130	\$3,305	\$429,527	130	\$859,053	66	\$436,113	\$5,174,078			
FVCC	232	49.35%	114	\$3,170	\$362,940	114	\$725,879	57	\$358,221	\$4,341,121			
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MSUN	237	62.27%	148	\$3,861	\$569,775	148	\$1,139,551	92	\$709,560	\$7,256,661			
U of MT	1179	58.60%	691	\$4,559	\$3,149,786	691	\$6,299,571	405	\$3,691,549	\$39,422,718			
MSU - Boz	2858	67.00%	1915	\$4,873	\$9,331,113	1915	\$18,662,226	1283	\$12,503,691	\$121,491,088			

**Historic rate averaged with '14, '15 non-coached cohort retention rate*

The fall-to-fall retention rate differences were used as proxy in calculating same-year fall-to-spring retention. For the comparison group, it was assumed fall-to-fall retention rates held through both semesters in Yr. 2 and Yr. 3, while the retention rate difference between coached and non-coached students was decreased by 1/3 in Yr. 3, assuming that the impacts of coaching decrease over time once students stop receiving services. Average college costs based upon 12-credit tuition and fee schedules and an FTE allocation of \$1,440/semester. \$720 per student was used as the per student cost based upon the original per student costs included in the RevUp Montana contract with InsideTrack (\$1.89 million/2,625 students = \$720/student).

