Appendix E
Outcomes and Equity Template Instructions
Template Set One
Demographics by Sub-Group

INSTRUCTIONS FOR PTR TEMPLATE SETS

Three groups of Outcomes and Equity Template Sets (Excel Worksheets) have been created by OCCRL to report program of study enrollments and outcomes by sub-groups. The electronic templates are online at http://occrl.illinois.edu/projects/pathways/phases/2.

Each set of templates contains individual worksheets for the following sub-groups. Worksheets are uniquely named to indicate the sub-group analyzed in each sheet.

   Race and ethnicity (categories recognized by the Department of Education in 2007)

   Special populations

   Gender

   Socioeconomic status

   Age

TEMPLATE SET ONE: Demographics by Sub-Group

Template Set One shows the demographic characteristics of students in local high schools, the community college, and the program of study broken out by sub-group. The purpose of these templates is to help PTR teams understand who is enrolling and accessing the identified program of study that the team has decided to improve.

Template Set One includes five templates. The templates are structured to allow teams to observe sub-groups of students who are enrolled in high schools, the community college(s), and the identified program of study that the PTR team has identified for its project. The five categories of demographic characteristics included in the templates are Race/Ethnicity, Special Populations, Gender, Socioeconomic Status, and Age. Teams may add additional categories based on their interests, and some of these categories can include English Language Learners, part-time or full-time enrolled, part-time or full-time employed, first-generation, etc.

Also, PTR teams may modify the demographic characteristics categories based on the needs of their project. For example, some PTR teams might define Socioeconomic Status (SES) based on secondary students' eligibility for free lunch or a postsecondary student's eligibility for Pell. Others may define SES based on parental income and educational levels. Availability of data is often a primary determinant of the outcomes that PTR teams are able to use for this analysis.

Step 1

The PTR team should determine the cohort(s) to analyze in Template Set One. A team might identify all students who first enrolled as majors in a postsecondary program of study in fall 2010 as a cohort, or the team might narrow this cohort to look at only those students who had also enrolled in a related program of study at the secondary level. This analysis is likely to involve small numbers of enrollees, but it may be valuable to understand outcomes of students who matriculate from the secondary to the postsecondary level in a particular program of study. On the other hand, it may be useful to conduct analysis with larger numbers of students, so the PTR team may decide to combine all students who first enrolled as majors in a postsecondary program of study in fall 2009, fall 2010, and fall 2011. The bottom line is that there is no one right way to conduct this phase. What the PTR team should do depends on what it is trying to learn and how it wants to improve the selected program, while recognizing circumstances that are unique to their team.

More specifically, on each worksheet in Template Set One (with the exception of the "Age" characteristic) there are four types of cohorts: 1) the Postsecondary program of study Student Cohort; 2) the Secondary program of study Student Cohort; 3) the college group; and 4) the high school group. The Postsecondary and Secondary program of study Student Cohorts should be defined by the teams as described in the previous paragraph. The college group is defined as all students in the community college. The high school group uses enrollment numbers from the area high school, these enrollments can be acquired from numerous sources including from the EFE regional director, from the high schools and from the state boards of education.

Finally, the PTR team can create a comparison group to which sub-group analysis can be applied and compared to analyze the student composition of the identified cohorts. One example of a comparison group is residents of the community college district. Conclusions about these comparisons need to be made very carefully, particularly when the cohort groups are small and sub-group numbers fluctuate substantially from one year to the next. This is one reason that it is useful to look at more than one cohort so that enrollment patterns by sub-groups can be identified.

Step 2

Use each template and fill-in the "Count of Students" cells (the blue highlighted cells) based on high school enrollment data, college enrollment data, program of study enrollment data, and/or any other data the team decides to collect. The percentages (in the red highlighted cells) are automatically calculated based on student counts. Therefore, it is important not to edit the red highlighted cells or the equations will be deleted.

Step 3

The graphs are automatically populated based on the data inserted into the templates. Once tables are complete, PTR team leaders can share the templates with team members and ask for their analysis. The tables and graphs can also be copied and pasted into a word document to send to team members. The decision about format may depend on team member familiarity and comfort-level using Excel software. Team members who have experience with Excel may find it advantageous to use this format because it provides the opportunity to modify data to simulate the impact on specified enrollment and outcomes of interest to the group.

Outcomes and Equity Template Instructions
Template Set Two
Outcomes by Sub-Group

INSTRUCTIONS FOR PTR TEMPLATE SETS

Three groups of Outcomes and Equity Template Sets (Excel Worksheets) have been created by OCCRL to report program of study enrollments and outcomes by sub-groups. The electronic templates are online at http://occrl.illinois.edu/projects/pathways/phases/2.

Each set of templates contains individual worksheets for the following sub-groups. Worksheets are uniquely named to indicate the sub-group analyzed in each sheet.

> Race and ethnicity (categories recognized by the Department of Education in 2007)

> Special populations

> Gender

> Socioeconomic status

> Age

TEMPLATE SET TWO: Outcomes by Sub-Group

Template Set Two shows outcomes for students in a secondary and/or postsecondary program of study. The student groups (sometimes called cohorts) may be at the secondary level, the postsecondary level, or start in secondary and continue to the postsecondary level. The purpose of these outcomes templates is to illustrate how PTR teams can identify which student sub-groups should be included in the project.

Template Set Two includes several outcomes-oriented templates, beginning with the following four:

> Fall-to-spring retention

> Course completion

> Certificate completion

> Degree completion

Teams should use these templates as examples to create new outcomes templates that align with the program and problem that their team has identified. These templates are structured to allow teams to study outcomes for sub-groups of students who are enrolled in the identified program of study. The templates show data disaggregated by Race/Ethnicity, Special Populations, Gender, Socioeconomic Status, and Age. Teams may adjust the templates to analyze other characteristics, such as first-generation status, English language learners, or special education status, by copying the templates to new worksheets and editing them to fit the PTR team's project.

Step 1

The PTR team should determine the cohort(s) to analyze. For example, a team might identify all students who first enrolled as majors in a postsecondary program of study in fall 2009 as a cohort. If enrollment figures for one semester are too low for analysis, a PTR team may decide to combine all the students who first enrolled in a postsecondary program of study in fall 2009, fall 2010, and fall 2011. Exactly what the PTR team should do depends on what it is trying to learn and how it wants to improve the selected program of study. Interpreting results based on small numbers can be problematic in this kind of analysis. In particular, teams should be cautious about generalizing results from a single small cohort. If combining groups is possible to create a larger group, including looking at two, three or more cohorts then teams may feel more confident about concluding that patterns exist in the data than if they look at one cohort that has a small number of students. If combining multiple periods of time, teams should also consider whether unusual spikes or drops were seen in any single period. The team may want to look at the patterns in three cohorts that have been aggregated and in the three cohorts without disaggregating. Both of these studies may be informative to PTR teams.

Step 2

PTR teams need to select relevant outcomes measures from the PTR *Outcomes Menu* (see Engagement & Commitment Module), or select another outcome that relevant to the project. The four outcomes that have templates that automatically create tables and graphs are:

Fall-to-spring retention

Course completion

Certificate completion

Degree completion

The *Single Outcome Templates* are made to record a single outcome measure, such as fall-to- spring retention, disaggregated by demographic characteristics. The purpose of these templates is to see the sub-group's performance (by demographic characteristic) for selected outcome(s). This analysis should be considered a baseline analysis as it provides a snapshot that is relatively limited, but it is a way to begin to determine whether patterns exist in student performance on outcomes pertaining to the program of study for specific sub-groups.

With the *Course Completion Template,* the team should choose one course that it believes is critically important to the identified program of study. Performance in this course is vital to students' performance and matriculation. Examples could be a developmental (math, reading or writing) course that is key to entry into the program, a gatekeeper course (e.g., the first required core CTE course or general education core requirement), a capstone course, or other similar course identified by the team. Most important, the chosen course should be one that is known to be critical to student progression through the program of study and to achieving a successful completion in the future.

With the *Certificate Completion Template*, the team will measure the rate of completion of students enrolled in a selected program of study that offers certificate options. The team will identify a cohort of students (see Step 1) and track them for a specified amount of time, which may be tied to the Perkins Core Indicators and Performance Measures.

The *Degree Completion Template* is similar to the *Certificate Completion Template*. This template will measure the rate of Associate Degree attainment in the selected program of study at the end of a given time period, for the cohort of students identified by the team (see Step 1). The time period considered can be tied to the Perkins Core Indicators and Performance Measures.

With the *Fall-to-Spring Retention Template*, the team will measure the retention rate of students enrolled in selected program of study. The template is designed to follow a cohort of students over the specified period of time (see Step 1). The template can be changed to track retention over a year (Fall to Fall) or for other periods of time that are logical to the PTR team and to the problem it is attempting to solve with the PTR process.

Step 3

The outcomes templates have been populated with numbers to provide an example to help the PTR team understand how to interpret data. Then, use the templates by filling in the appropriate cells (the blue highlighted cells and the purple highlighted cells in the templates for special populations) based on the data your team has collected from an identified student group/cohort (as explained above). The percentages and totals (in the red highlighted cells) are automatically calculated and a graphic is also automatically prepared to display the results. It is important not to edit the red highlighted cells or the equations that create the results and automatically prepare the graphics will be deleted.

Step 4

As noted, the graphs are automatically populated based on the data inserted into the templates. Once tables are complete, PTR team leaders can share their templates with team members and ask them for their analysis. (PTR teams may also want to enter data at a team meeting, so that the group understands where the numbers come from and how the spreadsheets can be used.) The decision about format may depend on team member familiarity and comfort-level using Excel software. Team members who have experience with Excel may find it advantageous to use this format because it provides the opportunity to modify data and see how outcomes of interest to the PTR team are affected. It is important for the cohorts to be creative! The results will be used for improvement purposes only.

Appendix G
Outcomes and Equity Template Instructions
Template Set Three
Longitudinal Enrollment by Sub-Group

INSTRUCTIONS FOR PTR TEMPLATE SETS

Three groups of Outcomes and Equity Template Sets (Excel Worksheets) have been created by OCCRL to report program of study enrollments and outcomes by sub-groups. The electronic templates are online at http://occrl.illinois.edu/projects/pathways/phases/2.

Each set of templates contains individual worksheets for the following sub-groups. Worksheets are uniquely named to indicate the sub-group analyzed in each sheet.

Race and ethnicity (categories recognized by the Department of Education in 2007)

Special populations

Gender

Socioeconomic status

Age

TEMPLATE THREE: Longitudinal Enrollment by Sub-Group

These templates are for **longitudinal analysis of enrollment at the secondary and postsecondary levels,** disaggregated by race and ethnicity sub-groups. They are more relevant for PTR Teams working with enrollment figures high enough to draw robust inferences. (If smaller numbers of students are enrolled, Template Set One is a more appropriate tool.) These templates allow for data to be tracked for a target group of students over time, for example, from secondary to postsecondary and from one year to the next. The templates also allow for comparisons to other groups that are determined by the PTR team to be relevant to the project.

Step 1

The first data table on each of the templates only looks at cohorts of students enrolled at a given point of time. The team has the flexibility to choose the point of time for the first table. The worksheet in Template Three tracks four types of cohorts: 1) the Postsecondary program of study Student Cohort; 2) the Secondary program of study Student Cohort; 3) the college group; and 4) the high school group. The Postsecondary and Secondary program of study Student Cohorts should be defined by the teams as described above in the directions for Template Set One, Step 1. The college group is defined as all students in the community college. The high school group uses enrollment numbers from the area high school, and these enrollments can be acquired from numerous sources including from the EFE regional director, from the high schools and from the state boards of education.

The remaining data tables are longitudinal and record head counts of students for each year, disaggregated by race & ethnicity, special populations, gender, socioeconomic status, and age sub-groups. The time period would optimally correspond to academic years. Teams enter data for each of the sub-groups. The table of Total Students Per Year is automatically generated.

Step 2

In each table (except Total Students Per Year) fill-in the "Count of Students" cells (the blue highlighted cells) based on high school enrollment data, college enrollment data, and program of study enrollment data. The percentages (in the red highlighted cells) and all information in the table for Total Students Per Year are automatically calculated based on sub-group student counts entered by teams. Therefore, it is important not to edit the red highlighted cells or the equations will be deleted. In the longitudinal analysis, teams can also select the length of time period considered, based on data availability.

Step 3

The graphs are automatically populated based on the data inserted into the templates. Once tables are complete, PTR team leaders can share the templates with team members and ask for their analysis. The tables and graphs can also be copied and pasted into a word document to send to team members. The decision about format may depend on team member familiarity and comfort-level using Excel software. Team members who have experience with Excel may find it advantageous to use this format because it provides the opportunity to modify data to simulate the impact on specified enrollment and outcomes of interest to the group.