**Melinda Karp Interview Transcript**

**Holistic Student Supports**

**Focus on Student Success Teams**

**AS** [00:00:00] For today's podcast, it's a pleasure to have Dr. Melinda Karp. Melinda is a nationally recognized expert on improving students transitions to college and supporting them once they're there. She founded Phase Two Advisory after nearly 20 years conducting research and working with colleges on education reform as assistant director at the Community College Research Center Teachers College Columbia University. The proud granddaughter of refugees, Melinda works with national and institutional leaders, campus based faculty and staff, and philanthropists to ensure that all individuals have the opportunity to realize the intergenerational mobility higher education provides. She frequently writes, speaks and comments on education reform at professional meetings, in the media, and in academic forums. Melinda holds a B.S. in human development and family studies from Cornell University and both an M.A. and a Ph.D. in sociology and education from Columbia University. She chairs the Effective Advising Practice Guide Panel for the Institute of Education Sciences What Works Clearinghouse, and she is a member of the inaugural editorial team for the Journal of Postsecondary Students Success. Welcome to the Student Success podcast, Melinda.

**Melinda Karp** [00:01:18] Thank you. I'm so glad to be here.

**AS** [00:01:20] So I'd like to start all podcast by asking guests if they wouldn't mind sharing something beyond their work. A hobby, a special talent, perhaps, or a story they would mind sharing. Do you have anything you'd like to share?

**Melinda Karp** [00:01:36] I did ask my kids. I think I've come to embrace the fact that for a lot of us, parenting is our one of our primary identities and we hide it at work and I have no filter, so I decided not to. My kids informed me that I have nothing interesting to share. I don't actually believe them. I think the two things, one anyone who knows me knows that I am a New Yorker by birth. I grew up in Rochester, as you said, went to Cornell. Go Big Red! You and I both were there, I think at the same time, and then lived in New York City for a very long time when I was a Teacher's College and I now live in Denver, Colorado, which has been a shockingly big culture change in some ways and really informative. The other one is that I am a runner. I've run seven marathons and over 20 halves. I am not fast. I'm just stubborn. So I think those are the two things they finally decided were interesting about me.

**AS** [00:02:25] So let's talk about culture change for a moment. It was a culture shock. So can you explain that a little bit?

**Melinda Karp** [00:02:32] Yeah, it's really interesting. As someone who spent her whole life on the East Coast, you don't feel like you're going somewhere new. It's still the same country. Denver is a city. It's not like we went full rural, although I can see mountains from my house, not big buildings. And I'm a sociologist, like, I talk about culture all the time and that culture is this soup that we live in, right, that you don't notice it. And I think if we think about this from a transformation institutional perspective, it's often one of the hardest pieces is that every college, higher ed has a culture, and every college has a culture, and we often don't even realize it. And it was really interesting to live that shift. There is something different about being in the Intermountain West than being on the East Coast, and I'm having a very hard time articulating what is different. But it feels different. The diversity is different. That's not to say that Colorado is not a diverse state absolutely is, but it's a different kind of diversity. And I don't know how to explain it, but my husband moved out about 10 months before I did with the kids, and he kept saying, it's just really different. It's like, What does that mean? I now know why he couldn't articulate it, because there's something about culture that when you're in, it is very hard to define, and yet you feel it. And so I have felt very dislocated. We also moved about 18 months before the pandemic, which I would not recommend because it's really hard to grow roots during a isolating period. But I do think that this idea that we live in a soup that we can't articulate and it frames how we live our lives and move through the world, we kind of know that in higher ed, but to live it this way was has been very interesting. So that was not a great answer because I'm still puzzling it through myself.

**AS** [00:04:20] Well, that's an honest answer, and I'm sure you've heard this before when college professionals move from one campus to another. And like that. It's a soup. And sometimes they struggle. They're like, Oh, I, it's just different. And it's hard to articulate it. But after a while, they begin to see the nuances and what makes the soup so different from the other soup. But yet there's still some similarities. There's still some things that are still the same.

**Melinda Karp** [00:04:51] Yeah, I mean, I think one of the things that, to put in higher ed, is we talk a lot about this when we think about this from an equity perspective, right? That our institutions culturally were grounded for 18 year old white men, and a lot of our norms grow up from that tradition. And so when we ask our students to move into those institutions, we're asking them to move to a different type of soup. And that sense of dislocation that you can't quite put your finger on it. It's it's real. Right? And when you and I can speak now as having moved, like when you feel like you don't belong, it doesn't make you want to stay, like, I mean, I'm good now in Colorado, but there was a while I was like, this is I'm not sure I'm cut out for the inner Mountain West. I can't get a good bagle here and it over time, or pizza. We go back to New York and all we want is the carbs. But I think there's an analog there for faculty and staff like you said, when they move from institution to institution, but also for our students that they go from high school to college or the workplace to college. And on its surface, it's not super different. But there's something different about it. And that sense of dislocation is real. And how do we help them navigate that? And I've been writing about that for 20 years. But to live it, changes how you, you know, changes how you interpret that.

**AS** [00:06:13] Yeah, I like that you you put students into this because it's not only college professionals that move to different soups, but students come from a K-12 soup. Into a higher ed soup. But sometimes especially for reentry students, they went out and did other things. So that's another soup altogether. And you know, we'll see about bringing back the marathon piece because I do want to learn more. But I'm always fascinated by people who can run that far because I felt that being healthy is really important. I try to be fit all my life but I could never run that far.

**Melinda Karp** [00:06:52] You have to really love yourself. You spend a lot of time with yourself.

**AS** [00:06:55] Yeah, I I have not figured out how to run that far. I do so many other things, good stamina. But anyway, that's for, I guess, another podcast. So one of the ways that we want to make this soup more delicious, more accommodating for students has been this notion of, let's let's break down silos in higher ed. Let's change the way we do things, and one of many ways is this concept of student success teams, and you have done a lot of work to learn what is that exactly, because it doesn't mean the same thing at every campus. And you created a guide, a student success teams guide, and please take us through the process of creating that guide. And what are the findings.

**Melinda Karp** [00:07:56] Yeah. And I'm so glad we get to talk about it where I'm I'm incredibly proud of this work, and I want to acknowledge my Phase Two colleague, Suzanne Lyons, who coauthored the guide with me and has been just a fantastic partner. So the guide itself is about holistic student support teams, which is sort of an evolving and new structure to provide students with holistic support on community college campuses. And before I talk about the guide, I'll just really back up quickly and give you sort of the the research base for this, which is, you know, for many, many years going back. Long before I left CCRC and founded Phase Two, I was doing all of this work on what students need outside of the classroom to be successful learners in the classroom and the field has really evolved. And to the point where we understand that you have to support students as their whole selves if they're going to navigate institutions and be successful learners. And so what happens outside of the classroom is important for what happens inside the classroom. That's not merely academic advising and planning. It includes helping students navigate basic needs. It includes helping them learn how to be college students as we culturally expect them to. And that's not how our colleges are set up, right? So our colleges were set up for a very long time to have these very, very siloed, not just student services versus academic support, right? But like financial aid was in one office and advising was in a different building. And if you had a food pantry, it was down in the basement. And so students were being asked to navigate all of these services if they wanted to meet all of their needs as full humans and learners. And so the puzzle has been we know this from research, we know this from the CUNY ASAP work in New York. We know this that task force from IES that you mentioned, we synthesized all of the rigorous research on advising and student support. And it's very clear that if you can create this holistic structure for students where they have a person, they have sustained support. That's not just about the first year, but all the way through. They're much more likely to be successful. The challenge has been how do you do that on our campuses, which are immensely resource constrained? We don't have enough advisors and counselors. We don't know how to reach students where they are because we're all doing effectively like seven jobs on many campuses and the needs are vast and the resources are not. And so that's really been the puzzle that I've been working it for a while is how do you do what we know works in a way that is scaled and we can get to as many students as possible? And again, we have done this for pockets of students for years. We have done it in Puente, Trio, Umoja, our foster youth programs, CUNY ASAP. The problem is it's two or four or six hundred students on campuses of thousands of students. And so again, the puzzle was how do you take those research based principles of holistic support and scale them and not lose the magic of focusing on equity populations and being culturally responsive? But scaling? So that was sort of what we were trying to figure out. A lot of colleges, their solution to this puzzle has been to launch what are called student success teams. And at a very high level that was if you can't hire more advisors and counselors, let's have a team of people do holistic support as a way to be almost an efficiency play when you scale. So we set out to understand from the early adopters of this approach, like how do you do that? And as you said, when you go to a team approach, you're inherently breaking boundaries, you're inherently thinking in different ways cross-functionally, and we know that the work is really hard. And so what we wanted to do was understand how leading edge institutions are implementing these student success teams. We went into the guide really committed to using the principles of rigorous qualitative research, but doing it in a way that was incredibly actionable for practitioners. So the guide itself is based on eighty-five interviews at nine institutions, six of them in California, three from other states that are analogous. Strong collective bargaining cultures, et cetera. So 85, folks. We coded everything three times, we did what I would have done at CCRC, but then rather than write a journal article, we were trying to pull out the nuggets of lessons for practitioners. And so everything that's in there is grounded in research principles. I feel confident that it's a thing. It's beyond anecdote, but it's not highfalutin, like qualitative theory, the way I might have done 10 years ago. We also work directly with the designer and the design team from the outset so that we could make a guide that was accessible to people who don't work in higher ed. They really pushed us to think about our language and to be really actionable. The idea is that if you are on a college campus and you're like playing with a success team idea, you can pull this guide off the shelf and start to think about what do I need to do to make it happen, right? What have other colleges done? And importantly, we really wanted to elevate how hard the work was. We heard a lot from folks that were done with bright, shiny objects. We want to understand essentially where things go south. And so the guide is actually structured around the kinds of things you need to think about from the beginning, because if you don't, it will make the work harder. So it's almost like, here's what the early adopters wish they'd done differently. And here are the tactics they used to get unstuck when things got sometimes a little ugly. And that way, you, as a practitioner, can learn from these 85 folks if I plan for this. Here are some strategies I can use that hopefully will smooth things. I'm not going to pretend it's going to suddenly be easy because that's not what I believe, but it's really practical and tactical. So that was the guide itself. And I'm really excited to hear from folks if we achieve those goals because we tried really hard to be evidence based. But in a way that is useful for people actually doing the work.

**AS** [00:14:22] I appreciate that you went the route of having the practitioner in mind. I've been saying this for years. I get it that in higher ed, especially when you're at a university, you've got to publish or perish, and you've got to go submit to journals and all that. And then fellow researchers can read that. That's great. But I work with practitioners for decades. They don't read those articles. They'll look at the abstract and maybe the findings, but they're not going to spend a ton of time or no time at all on the methodology and all of that. And so I've even told all my researcher friends, if you're going to, if you're going to publish something in a journal, then can you create that as some slides or visuals for their practitioner. So I appreciate that you went this route. So what are some of the findings?

**Melinda Karp** [00:15:18] Yeah. So the first finding was that, as you know, we have a language problem in higher education. So we thought that we would be looking at these student success teams. And it was a thing. And I should say we pull together an advisory board of practitioners, and I again, I am so grateful to them. We had folks from campuses and community colleges in California and across the country. We had some folks from the Chancellor's Office. We had some nonprofit folks helping guide us around the methodology and making sure that we were again foregrounding what practitioners needed to know from our data. So we pulled together a definition of student success teams that essentially says it is a team of people cross-functionally working together to cohort manage a group of students from entry to completion. Meaning you're not doing full case management, but you're keeping an eye on that cohort to provide holistic student support. And so right there we were already differentiating it from some campuses have success teams that are institution wide, right? And they're really looking at data and looking at as a campus or as a college, where do we need to double down? And so we were already differentiating it from that kind of student success team. But these are success teams that are meant to provide holistic student support to cohorts of students. And we and our advisory board thought that would be a sufficient definition, and that's how we selected our nine colleges. And what we realized with even within that definition, there are essentially three kinds of holistic student support teams. So, you know, we really make life complicated for ourselves in higher ed. And what's interesting about that is, I think of it from a change management perspective, and I think what we think is happening is the three sort of flavors of teams actually are sort of an evolution or a continuum. So colleges seem to be starting with what we're calling sort of this back and coordinating team where a group of cross-functional folks are working almost behind the scenes to start looking at data to coordinate services for their cohort. And I want to be clear that this isn't about the whole institution. It's still about often it's a meta major, but not always. But you know, you've got multiple teams on a campus. We are going to look at our data and we're going to figure out where the trouble comes for our arts and humanities students, or we're going to figure out what additional supports we need to get our engineering students over the finish line. So their cohort managing it. But what's interesting about this team is the students often don't know it exists. Like the folks on the team are keeping an eye on the cohort, but the students may not know what's happening on their behalf because it's the back end. And I think what we've come to realize is that's step one, because you do need a data infrastructure to do this work, right? And so these teams are sort of the first step towards building that infrastructure where you could do more intensive student facing case management. The second type of team is what we call network support. And I'd say that this is what I think is most common in California right now, in particular, where you've got a group of people who work as a team and they're like, all may be named in the students LMS as their team, and they're an easily identifiable network of people for a student. So if I'm a student, I know that this is my counselor or advisor. I know this is my faculty liaison. Maybe I know this is my financial aid person and they're all named for me, but at least I know who to go to, and those folks work together to coordinate support for the students on their team. And they try and streamline. They integrate, and they often continue to do those back end coordinating data exploration things as well. So that's why I say we're sort of seeing that they build on one another and they don't they're not a stage theory. They overlap sometimes to the final kind of team we identified. And I would argue that this is the most mature kind of team and the closest I've seen to doing a like CUNY ASAP case management without having to do CUNY ASAP case management because we know that you can't really afford that in most places is what we're calling a networked single point of contact. And so in that instance, you do name for the students, one advisor or counselor who's like their go to person. But that adviser or counselor is not alone. It's not full case management. They have a named group of folks behind them, so they have an assigned financial aid coordinator as an assigned faculty partner who they can do warm handoffs with. If they can't answer a student's question, they can go to that person. So on the back end, it's still it's like this network, this team supporting the cohort. But for a student, it's like, Al, you're my person. And Al, if you can answer my question, you have a whole team to help me. So this really is evolutionary in that you kind of can't do that network single point of contact if you haven't figured out your data and you haven't figured out who the network is. It's really hard to get to that single point of contact, but they are distinct when you look at them. They are different kinds of teams and we did not expect that. I mean, we really thought a team is a team, is a team. And that was not at all what we were finding.

**AS** [00:20:46] What I found over the years because I've asked a lot of questions as I've seen student success teams, so many campuses trying it, they show me PowerPoint slides are very pretty with a team for each meta major. But when I ask them, What do you do? What do you actually do? They'll say, well, we do cohort or case management. I said, but I ask what's your definition of that? And they don't have one. When I dig and dig and dig what the theme that emerged for me, at least for campuses that were doing this in their first or second year is that they're forming these teams. But they were primarily a referral service. So, OK, this we see a particular milestone here. These students are not taking 30 units in their first year, so we're going to refer them to Puente or Umoji or. It's primarily a referral type of situation. What have you found is a consistent definition of case management or cohort management that moves beyond just I'm going to send you an email or text, and I'm going to have you go to this other department.

**Melinda Karp** [00:22:06] Yeah, so I think this is, some this is again sort of an evolutionary thing. I mean, we heard a lot of that to Al that one of the things we realized and I hope this comes through in the guide is that it would behoove institutions newer to this work to have a conversation about what case management or cohort case management is before you launch the team. I think a lot of folks, because this work is so urgent, and for that, I am grateful, right? There was a time where nobody paid attention to holistic student support, so I'm grateful that folks have urgency and just want to move. But because the work is so urgent, a lot of institutions launch their teams without really digging into what's the team going to do. And this is something that, you know, you and I have talked about this and I feel like a bit like a broken record, but I'll say it any time I can. This is true with lots of reforms. We tend to focus on the structural change. How will we rearrange the deck chairs, not what we're going to do differently once we have a new structure. And I think it impedes our ability to actually change the student experience, which is what we care about, right? So I think you're right. I think a lot of colleges launch success teams because it was urgent without spending time figuring out like, what are we going to do? And so we have actually talked about in the guide that iit behooves a college to spend a little bit more time in the planning phase, starting to articulate What will you do? What does case management mean? Define what equity means because these are only equity strategies if you center your definition of what that looks like and how you measure it throughout the process. You can't just say we're going to do success teams for equity. You got to actually do that, right? So all of these difficult definitional conversations really need to come before you launch. And I think what you're reacting to Al is because colleges were being urgent, you're seeing a lot of institutions that launched the structure without the conversation about what do we do with the structure? And again, that's not a success team thing only. I think we do that a lot in higher ed. I will say that if you double down on what does cohort case management look like? First of all, I would argue the referral service that a student knows how to find the referral service is still better than what was before. So let's not discount that right if we think of this as an evolution. If we think of transformation of our institutions as one long continuous improvement process, which is how I like to think of it, even that referral service is better than what was before and may not be our perfect end state, but I'll take it over letting atomized students just wander around, hoping they find the right person, right? And I really do think that there is something that we need to acknowledge that this work is hard. It is long term. We had a college talk in this study. It's my new favorite thing about how they launched their first pancake that you know, when you make pancakes like the first one, like the griddle is not never quite right. Like, it's never quite the right temperature. It's always a little burned or a little misshapen, and then you got to tweak it to get the good pancakes. And they talked about how their first foray into success teams, it was like it was our first pancake. Like, it was not really where we want it to go. But it was better than nothing. And so I want us. I want to just acknowledge that the colleges that you're referring to that haven't dug into cohort case management, it's probably still better than what was. That said, I think ultimately where you want to get to is a place where if you have a cohort, whether it's a meta major or we had a couple of colleges in our study that were doing their success teams around affinity groups, so either for all of their black students or through their multicultural center. So it doesn't have to be through a metanmajor. But whoever your cohorts are, you're looking at the data partly on the back end so that you can coordinate things, streamline, fix policies, do referrals, but also get to a place where you can do that proactive outreach to say these are the students in our caseload who something's not quite right, something's off. Let's figure out how we talk about you as a student, not our global cohort, and intervene with them. And at the same time, you're building relationships with those students so they will come to you. One of the things that's super powerful about this network, single point of contact is by having only a single point of contact who is responsible for those initial outreaches and get to know you conversations. The students come back to that person. Right. Because now they know their adviser or their counselor. And you know, the college that had the most mature version of this in our study called them success advocates. And we interviewed those success advocate because they said our jobs are so much richer than they were before because the students come to us. And that, to me, is this cohort piece. It doesn't mean every student is in the cohort was coming to them all the time. But the ones who needed it were, right. And I think that's where you ultimately want to get to is this dance between analyzing the cohort data to do some higher level interventions for everyone or large groups of students in the cohort, individual data analysis to do proactive outreach and then the time in space because you have a team approach to get to know your students that they will come to you.

**AS** [00:27:57] Yes, thank you. When I often work with colleges, I talked to him about the three C's. I say clarity, coherence and consensus. Relentless, relentless clarity because, you're right, if the referral system is better than nothing, but when they lack the clarity, for example, when they have a robust FYE program that's also doing a referral service and now students are being, and then they're also part of TRIO, and so now they're receiving double contacts. So that relentless clarity is so important to actually define what does it mean to cohort and case manage and evolve? This is messy work. It is that first pancake can look pretty interesting. The other thing that I've noticed, let me know if you have as well, is that it's very interesting. I noticed that rural colleges, they may be small, but the people have such limited capacity because they're required to do more. Because there are small campus, right? Then you have the other extreme. I work with campuses that I have 30, 40, 50,000 students, and they experience something similar you would think they have, they do have more funding, obviously more resources to some extent, but they're overstretched. And it seems like and it depends on leadership we'll get to leadership here in a moment, almost the sweet spot appears to be the mid-sized that can pull this off. Not to say that rural college cannot or large ones, but especially this single contact for 30, 40, 50,000 student population colleges is is extremely challenging, to say the least. Have you found any themes on a small size, midsize, large size as it relates to student success team development and implementation?

**Melinda Karp** [00:30:03] I was sitting with that a little bit, and I think you're onto something. I don't think our colleges would totally support that. I'm just I'm sitting with it, our rural colleges, for sure. I mean, everyone. It's really hard. The flip side of that, though, is that you have fewer people to go back to the culture change conversation, right? You have fewer people to convince. And I do think that some of these really large institutions and this is true both in the nine colleges in the guide and some other colleges we work with at Phase Two. There are just so many more people. It's like moving the Titanic in a big institution. It's just the communication is harder. There will be many more opportunities for people to get the wrong information or interpret it incorrectly. You've got to convince that many more hearts and minds. And so that is really hard at these large institutions to say it's time to move the Titanic here. You know, like, I can get 20 people on board, but there are still 30 who have no idea what's happening. You know, where is it a small institution, at least as communication channels are there. And I actually have found that in smaller institutions, from a workload perspective, it's hard. I do think this notion of everybody knows you and you have a single point of contact is a little easier in the smaller institutions because they kind of all know each other anyway, because there just aren't as many people, the midsize institutions, I think it really depends and that's what I'm really sitting with. I'm trying to figure out if there is a sweet spot. And I would say that I don't. None of the schools with whom we work would tell you this work was easy or simple.

**AS** [00:31:37] No, it never is. I'm just wondering from your perspective, because you work with small sized, midsize and large. I'm just that's it's not scientific but it's just something a theme that I have found because of capacity issues. They're just different capacity issues with a very small and very large. The mid-size, yeah. But ultimately, so much of this is about leadership. Can you tell us a little bit about the importance of leadership in student success teamwork?

**Melinda Karp** [00:32:08] I could talk about it for forever. And I think, you know, one of the things that this guide and this study were about the launch of student success teams, but I went into it, I mean, my long term interest is about transformation more broadly. I mean, my love is always going to be holistic student support. That's what my research agenda was at CCRC. It's about students as humans. And so I love that piece of the work. But for me, this is always about institutional transformation. And so the success teams are an example of that. And so I think a lot of what we learned is relevant for all kinds of transformations and leadership was just, it's so critical and complicated, and I'm really reflecting on the article that was we're recording this the day after that article in Inside Higher Ed came out about the unbelievable leadership churn in the California community college system, which of course, I think most of us know intuitively. But it was sort of dug into and quantified. And I think because six of our nine institutions were in California, we did see a fair amount of what happens with the churn. When you try and do this work, really, what it comes down to is this really interesting tension. I think between leading from the middle and needing senior level support, so we talk a lot in higher ed about middle level leadership, about distributed leadership and much of this transformational work. Student success teams, guided pathways has been how to use the word delegated, but has really been asked to be done by middle level leaders. That's awesome because it builds skill sets. Mid-level leaders are closer to the day to day often than senior leaders. It's a pipeline which clearly we need. But there are different ways to do this, delegating to middle level leaders that can enhance or inhibit the work, and that's what really came out in our conversations. And we hear this a lot and it goes back years ago when I was at CCRC, we did a study looking at transformation where we basically realized that to do big transformation, and this was a study of advising redesign. Using technology, you need what we call sort of an aligned leadership. You needed to have middle and senior level leaders on the same page running in the same direction. Talk in the same talk, but using their positionality in complementary ways. It wasn't enough in that study to have fabulous senior level leaders who didn't have middle level support, nor was it enough to have fabulous mid-level leaders in absence of the senior support. And really, this this study on success teams confirms that the flavor of middle level leadership. Matter so very much, and I think what was most. Poignant for me was and this is partly because we were analyzing this with practitioners in mind. I didn't want to confirm that. I want to know like what does that really mean? Like what? What do senior leaders do to empower a middle level leader? We hear also, you got to empower them. You got to support them. What does that mean? What does that look like? And so we really dig into the guide into the kinds of things senior leaders need to do to truly let the mid-level level leaders grow and shine. And it was really poignant. You know, we had one mid-level leader say to us at one point, he's like, the bottom line is like at some point, leaders got to lead. Like, I can only do so much from where I sit at some point, I need my senior leadership to step up and make some choices. And I thought it was really poignant because I do think a lot, you know, mid-level leaders are so powerful and yet they're not. They're constrained and there are times where senior leaders can gather on the side of being quote unquote distributed in all it does is lead to frustration. And we had a couple of examples of that too. So we learned a ton and we do have in the guide a couple of pages of this is what people actually did to support their mid-level leaders. So for senior leaders, it's something you can take away. And for middle level leaders, we I want to be clear, we have the same kind of page for middle level leaders, too. What does it really look like to lead from the middle?

**AS** [00:36:30] Yeah, I find it really interesting how there's so much alignment with the research in the area of project management, and it's classic that project managers are tasked with two things go make change. But you have no authority.

**Melinda Karp** [00:36:50] Exactly.

**AS** [00:36:51] And so that's what's happened with the guided pathways work in general is that there are so many of these presidents, vice presidents say, well, you know, I need to step out, I can't really be involved because, you know, it gives the idea here, a perception, that it's top down. And let's have faculty, Guided pathways coordinators. And these poor people, they have to actually enact change, but have no authority to do it, so they have to use the art of persuasion, do things that may not require upper leadership to say I approve. But when the upper leadership is missing in action, it really makes it difficult. Right? And then on top of that. And if you heard of my three month rule?

**Melinda Karp** [00:37:47] Oh yeah, I think of your three month rule all the time Al and I think I might have mentioned in a meeting this morning.

**AS** [00:37:53] And you know what, I've kind of reduced it to two, three. I use it just because maybe it's more optimistic at times, right? But for the listeners, there's only two or three months in a year for colleges to get priority work done. Right, summer. Forget about it, September, too busy start of the semester, October is good, November December, it's the holidays and it's finals. We're lucky to squeeze in one or two meetings. January, we're gone. February, it's like September. It's the start of the new semester too busy. March says OK, April is spring break, and May, are you crazy?

**Melinda Karp** [00:38:29] Right? Exactly.

**AS** [00:38:31] So we have, and then on top of everything else, we have a dysfunctional, highly dysfunctional committee structure. Where people leave the meetings going, Oh my gosh, that was the biggest waste of time. They have no sense of outcomes. What the work is, they'll go from one meeting talking about something and then they go to the next meeting, and the first half of that meeting is exactly what they were talking about at the other meeting. And this lack of clarity, right back to the three C's, and so what happens is, as you know, you get people that say things in meetings, one or two faculty or say something and then everybody leaves the meeting and goes, will faculty now don't want to do this as if those two faculty represent all of faculty? Same thing with administrators. Well, the dean said this in this meeting, well administration say, one dean is supposed to represent all. So all I'm saying is that everything that you mentioned and the challenges of leadership. But higher ed, it has so much, so many hurdles, and these poor people, these leaders from the middle are tasked with making change, culture change. But again, we're no authority. So what are some of the tips that you have in the guide for leaders, for middle managers and vice versa?

**Melinda Karp** [00:39:57] Yeah. So I mean, we we should also say we're going to hopefully dig into this a little bit more. One of the things we're really grateful for is our funder, College Futures. We were like, listen, we have eighty five interviews, and our advisory board was clear that practitioners want no more than twenty five pages to read. So we can't give you all the details. And they were really grateful and gracious and are giving us additional funding to build out additional products. So over the next couple of months will be rolling out sort of deeper dives into some of the topics that came up in the guide, including leadership. And we'll also be doing some videos with mid-level leaders around how they navigated pieces of the work. So this is just, you know, sort of the first step. And I want to, first of all, thank the foundation, but also just let folks know there's more coming. One of the things that we heard and you sort of alluded to, this is and it was another one of those times where our interviewees just said it better than we ever could have, which is top down does not mean bottom only. And I think that is so critical, especially to your point, you know, things like student success teams because they are cross-functional. And I'm not talking about just crossing academic and student services. We're talking about data, technology, the registrar to get these back teams up and running that infrastructure requires talking to communications and your IR people and your IT people, and a middle level leader doesn't have the authority to tell the registrar you need to start coding a students meta major, right, and yet somehow they're supposed to do that. So top down does not mean bottom only. There are times when senior leaders need to step in and use the power that they have the authority, they have to get things done. The other thing that was really important, I think, for first senior level leaders and you alluded to this too was being clear about the vision and the constraints, so there is this sense of when you start in the design and early implementation phase, we want to let the middle level leaders design the thing. We want this to come from the ground up. But often senior level leaders a have a picture in their brain of what it should be. And B know what's not possible because of resource constraints that middle level leaders can't possibly know. And so we actually had one college in our sample, it was really heartbreaking in that they had been given full authority to design a student success team, and they designed what they called the Cadillac model. Only to go back to senior level leadership and be told like, well, actually, we wanted like the Fiat. You can't do what you want. In the middle of a leader's really interpreted that they took it a little personally, but also interpreted as it made them question their faith in the senior level leaders a little bit about does our college really believe in this work? Do they believe in this? Why am I putting my effort in my heart, my soul? And it really set their work back, even though they then had the the other version, which again was not a bad version, but it wasn't what they had been empowered to design and it felt really awful. So I would say one of the other key things for senior leaders is to set that vision to sort of get those definitions, that clarity of what's supposed to be accomplished, what the constraints are like if there are things that aren't on the table like honestly. This is the New Yorker in me, just call it, you know, set it out there. Better to upset people at the beginning than at the end. From a middle level, there are other things too, obviously, but those are two and then from a middle level leader, I think, you know, some of this is a learning process, but we need mid-level leaders to. And this is partly because I love mid-level leaders and believe in you, but to really set the the stage for you are the experts in this work, you know, especially if you're on counseling faculty and this is a holistic student support redesign. You know things. And it's OK to say this won't work or this will work for our job function, right? So to be in the room and use your voice at the table to grasp that power is really critical. And the flip side of that, I think and I don't think we talk about this enough. We talk a lot about that relationship between senior and mid-level leaders. But there are frontline staff, too, who are going to be directly implicated in any of these reforms, and we don't talk about them enough. And I think mid-level leaders have a really critical role to play in working with frontline staff to help them. Get engaged and get their voice heard in design and implementation and deal with the big feelings that big changes rightly engender. So to start to anticipate like this is going to like not work for whomever or this is going to be hard. We need to plan for it. That is a critical role for folks in the middle because you see up, but you also see, Oh, I use down. But if it's a hierarchical structure, you see down. And that's a space that vantage point is critical.

**AS** [00:45:10] Yeah. Over the years, I try to engage colleges with something thought provoking. I may start. The project with them with a few quotes, and over the years, I've been fortunate I've been able to work with so many. So one of the things I'll have up, I'll say. But I tell them, they already know they're going to talk about the three month rule and all of that stuff, but as you know, as colleges begin the work they do lose, they tend to lose momentum. It's just the nature of the work. But the way I often explain, I say, I say, you know, colleges lose critical initiative momentum when leaders neglect to behave like teachers and faculty neglect to behave like leaders. And I let on sit with that for a while. What does that actually mean? And you know what I'm trying to get at is that leaders forget that, you know, people want a V.P. president role. You're still a teacher. You still, right, you have to put on your teaching hat. You have to give everybody that relentless clarity, not just vision, but use some tools. I'm going back to project management because I'm big on that, you know, get the team to put together a logic model, for goodness sakes. Let's all be on the same page of your outcomes, your activities, your outputs, and then create an action plan. And then faculty, don't forget that your leaders. That you can coach up. And then the other the other quote that I mentioned because, and I usually use this with with presidents and VP and to some extent, deans, because they say Oh Al this has to be totally organic. These teams work. I can't be there at all. I had just have to be away. This has to be organic. What I've come up over the years, I say, well, look, allowing organic processes within teams is fine, but without some measure of structure and guidance, teams inevitably become organically lost.

**Melinda Karp** [00:47:21] Or what they do Al, and this is something I have seen and we talk about a lot, not just in not really in the guide as much as just some of the work that we do at Phase Two. You end up in a place if it's so organic, if the whole point is to make sure that all students get a base level of support, which is not the case right now on most campuses. If you let your teams kind of do whatever they want and go rogue, you're going to wake up in a year or two and you're going have one student success team that's throwing parties for them at a meta major and one student success team that's doing holistic student support. You're laughing, but I have been at that college. OK.

**AS** [00:47:53] I'm laughing because I know. I've seen it.

**Melinda Karp** [00:47:56] That is not the intent. The intent is to make sure that all students at your college get what they need when they need it, and not all of them need balloons. Right? So what we tend to council is as you build out your student success teams, whatever flavor of team that is, you need to have a base like template or structure. Like, here are the things that all of your student success teams need to do. And this is the base level of outreach. Like every success team is going to send a welcome email, they're going to send a welcome back e-mail, whatever it is. And this is again, why we really tend to council going slow to go fast, spend a fair amount of time in the implementation design before you try and launch so that your first pancakes at least edible. But you need sort of that base structure and then you need some organic involvement within that right? Because if you're doing this in the majors, what your health students need is going to be different than what your arts and sciences transfer students need. There is a whole set of things for your health students who don't get into competitive programs that needs to be built organically by that team, right? But that doesn't mean that there shouldn't be an expectation that, for example, every success team we've seen a lot of colleges use the LMS actually to do a lot of their cohort case management. So you almost build like a course shell for each meta-major. And so there's a base expectation that every success team will use the LMS and include such information and send such and such emails right? And then you can tailor it. But if you don't have the base level structure, organic just re-creates a new but similar mess to what we were trying to solve.

**AS** [00:49:42] Exactly. Yeah. The best thing to do is, you know, I tell them look, if you're going to do the cohort management or case management, what are your four or five goals that you want to achieve with students? Do you want to, and by the way, a meta-major can have upwards of four or five thousand students and you have a team of four or five. And so if one of your goals is, for example, we want to ensure that all students in our meta-major have an updated, comprehensive ED plan. We have to have the technology to first be able to flag know who they are and this is where we get the equity. Then if we're dealing with four or five thousand students, let's disaggregate that and which are the DI populations that are really right. So now we are much more targeted. But yeah, that's funny, Melinda. Well, and I was laughing because I've seen that because we allowed them to be too organic in the beginning without a lot of structure and planning, you have that.

**Melinda Karp** [00:50:43] And this is exactly why we wanted to flag in the guide the things to get ahead of, right? So, you know, I laugh about it, but the reality is we're talking about the early adopters. And whenever you do something new, you're going to do things that in retrospect didn't make a ton of sense, but we didn't know that. So now that we do, the intent is to say, OK, heads up. This sounded like a good idea, but actually, here's an alternative way to approach it, right? We've learned from the from the pioneers. And so I want to be clear that, you know, it sounds really funny and it is much harder to clean that up that situation than to start at the beginning with a little bit more structure and throughou the guide we do those kinds of surfacing of areas that in retrospect, we could have done it differently, and to be fair to the institutions in our in our guide like they problem solve their way through it. It just it made it harder than it had to be. And we don't want others to repeat that. We want ever to make new mistakes. Let's put it that way. Let's not make the same ones. Others did make your own. But we really we really do think that spending time to your point about getting clear, what do you want your teams to do? What do you need in order for them to do that right? And how will you accomplish it that needs to be done before you ever launch. Now I'll say that one of the other things is that, that is iterative. You may think you need X. Once you launch, you realize you need x prime. That's OK, but you need to at least start from a place where you know you're going to do the following things. The other one that we talk a lot about in that regard, data and technology feel obvious, but the other one is people. And we don't need to go into that because I know we're we're probably brushing up on time, but I did want to put that out there that this is people change, right? You're asking people not just during the planning phase, but once you launch, you're asking people to do their jobs differently. And that brings up all sorts of stuff. Some of it logistic, just what did those jobs look like? How do you navigate collective bargaining agreements, etcetera? But some of it is is full on emotional and identity work. And some of it is professional learning. And so I think one of the big insights for us was once you start to clarify, what does cohort case management mean for us? What are our expectations? You also need to put a plan in place to support people to meet those expectations. Right? Like if you say that now that we know that part of your job is going to be going into the canvas shell and identifying which students don't have a program plan and reaching out to them in an equity forward way? I don't know. That's not what you were hired to do, necessarily. And so we better support you as a professional with learning opportunities to navigate that technology. Rethink how you work with students who don't have a plan and why not? You know, it used to be that that was like the thing that career services did, but maybe you need a little bit of light touch. Career development, you know, professional learning. So building professional learning plans into implementation is a really critical change management piece that I think we haven't fully evolved. We spend a lot of time on professional learning for case making. We spent less time thinking about how to support our faculty staff in doing the new jobs. In a strategic, thoughtful and sustained way. And I do think that one of the reasons we often get a lot of resistance to big change is because it's fear. I don't know how to do this. You're asking me to do something I don't know how to do.

**AS** [00:54:36] Oh, it's definitely almost always rooted in fear. And that's why I get back to why leadership is so important in this, because I've seen this time and time again. And it's not just doing success teams, as you know, we need to change our practices. We need to be more equitable. And then you go to a certain committee because they'll do a road show and that needs to be, you know, go through committee meetings. And then I'm kind of tired of this word, to be honest with you, because of the way it's being used. I have concerns. If I have, I have some concerns. Some of them are genuine, but it's just a delay, sabotage tactic and when it's done within the context of a committee. Then again, the two or three month rule, then without leadership stepping in, they don't have to be front and center, but they've got to be chess players doing things behind the scenes because it's only just a few, they have fear and then they drive the agenda for the rest of the campus. And you see this time and time and time again.

**Melinda Karp** [00:55:41] Yeah. And so if you can mitigate some of those concerns by saying, Well, we actually have a plan to help you over their concerns, I think that goes a long way. And I don't think we've really we saw a couple examples of it in our study of colleges that were really digging into sustained professional learning like. Every week. An hour. As part of their team meeting, which sounds crazy given how busy people are, and of course, they threw it to the side during like peak registration periods, let's be honest. But the idea that our norm is we are all learners all the time and we're going to do this together and we're going to support each other and there is an opportunity to do your job better. That was really that was really powerful. The other thing that you alluded to was this idea that at some point senior leadership needs to come back in and say, we're just going to try it. I know you have concerns and maybe it won't work. And then we'll we'll come back and I say this with you. Obviously, you have to respect governance and you have to respect bargaining. But to sort of say, as a leader, like we've done our due diligence, we know we need to make the change. This is the direction we're committed to come with me on this journey. Let's try it. And being brave enough as a senior leader to say we've tried to mitigate as much as we can. I hear your concern. Come with me and made the call again when that happened. First of all, mid-level leaders were so appreciative. But secondly, that's how you move things because otherwise you you can concern yourself to never changing. And that doesn't serve our students.

**AS** [00:57:17] Exactly, you know, the end ultimately, the end outcome is student success and equity, and I talk about that in between this something that happens to happen in between. And that said, attitudes and behaviors need to change, but you're not going to get to that. If you don't do the work, you've got to do the work. You got to stop planning to plan and planning to plan and. There's a time for that. It's so important to have that, but it just drags on for years. And then you just see pockets of success here or there, and you don't see the kinds of changes we need to the culture to practices to really move the needle. This was so informative. Melinda I want to thank you so much for doing this study. Obviously, I'm going to put it in the show notes a link to it. What else do you have in store down the pipeline here? You have any more products, if you will, that you would like to share?

**Melinda Karp** [00:58:16] Yes. So we're in the middle of, as I mentioned, College Futures is incredibly generous and so we'll be rolling out, so we're filming this in April between now and basically back to school. Every other month will be coming out with deeper dives. Our hope is to get out sort of a getting started set of resources at the end of April, sort of digging into those types of teams that probably made people's eyes glaze over when I shared them at the beginning. Some questions to ask yourself and some sort of day in the life like, what does it really look like if I pick this team or that team? Because one of the things we really want is folks to be thoughtful about if they say we're going to do student success teams. To your point, what does that mean? How would you know which team? So those should be coming out in the next month or so along with hopefully some videos of practitioners, and then we'll release a few more sort of towards the end of June, we'll be looking at professional learning. We're looking at equity because we'd spend a fair amount of time digging into how colleges intentionally use the teams as an equity strategy or in some cases, not so. We'll put out a couple more resources in June, a couple more for back to school. All of that is on its own special page on Phase Two's website. And then in addition, of course, you know, Phase Two Advisory keeps working with colleges and foundations on holistic student support on advising redesign. I'm super excited. I'll be at the California Guided Pathways Institute at the end of April, I told Rob I may just burst into tears to be back in community with with all of our practitioners and getting back to doing the work in a new way. So we have a bunch of stuff coming out, but the thing that I'm most proud of right now and I'm always happy to get feedback from folks, is the idea that we're putting out these practitioner products that again, they're not anecdote their data, but they are designed for the folks, as you say, all doing the work.

**AS** [01:00:08] I may see you there in late April. I'm going to go crash it for a moment. I'm still so busy. Still, I have commitments with colleges throughout the whole, since I haven't traveled, as you experienced, I'm serving, I'm really fortunate to help a lot more colleges because it's all virtual, but I'm going to drop by and crash for a little bit. The last thing I'd like to close because you're a marathoner and I like for you to closes out with metaphorically speaking, given your experience as a marathoner and the challenges, but rewards that go with that, how would you use that experience to explain what you've learned with the student success team work?

**Melinda Karp** [01:00:56] So I had a feeling you might ask that, so I was thinking about it. And I actually realized I ran most of my marathons in grad school. I run a couple since then, but most of them were in grad school. And I think it's because, you know, when you're in grad school, it's like a slog. You never graduate. You never it's not even you didn't get to it a semester eventually. Like, there's no there are no milestones in grad school and a marathon is very rigid. Like to train for a marathon. It's 18, 26 weeks. You know what you have to do every day you get to check it off, which for those of us who are goal oriented, is wonderful. Maybe you only wrote one paragraph of your dissertation that day, but at least you went for your long run and it's very like tactical. And so I do think there's a lesson there for all of this, not just student success teams, but this transformational work, which is, yes, you need to keep your eye on the big picture, which maybe is that marathon. But there are intermediate things to do and celebrate on the way, and that's really important. And it comes back to this idea of you don't need to have the perfect student success team from the get go. Maybe all you can do right now is get that back end team up and running. I'm OK with that because it's better than where you were, and maybe in a year you'll have more capacity and you can move to the next phase, right? You. Don't have to write the dissertation overnight. You can be working on that slowly while you figure out how to run a marathon. It's weird to make the marathon the thing that's shorter, but it actually is in my world or was. But I think that idea of spelling out where you want to go in the long run, but figuring out what those intermediate places are that are better than before is really important for all of this work because we can go down a paralyzing rabbit hole of we are never going to fix our institutions. So why try just data navel gaze, problem, solve, identify the challenges? At some point you just got to put one foot in front the other and it will be better is the thing because I think everyone who does this work cares about students. So as you say, I'll do the work. Check that that little runoff and eventually you'll wake up and realize you can run 13 or twenty six miles, but no more marathons for me. I'm done. It takes too long.

**AS** [01:03:15] That was great. Thank you so much for participating in the Student Success podcast and Go Big Red,

**Melinda Karp** [01:03:23] Go Big Red.