Smart Planner, Take-a-ways

Ref: The Burgundy Group, The Case for Smart Planner, How Smart Planner Can Add Value to the University, Sept 2015

Smart Planner will:

- Consider a student's current existing transcript;
- Apply the student's chosen degree requirements; and
- Automatically generate a recommended, multi-semester course sequence through graduation

Specific information relative to Cal Maritime:

- With the exception of ET Department, only students who started in Fall 16 and beyond have smart plan available (Freshmen – Junior).
- If a student is a PostBac, they will not have a plan
- Critical courses need to be defined for majors
- Preferences have been adjusted to account for semester unit loads greater than 20 units (overload) so that 4 year plans can be made, however, students will still need an overload form properly filled out if they wish to schedule an overload.

Functionality

- Automatically generates an accurate, personalized, multi-semester course sequence based on each student's major and progress;
- Provides a user-friendly interface for students and advisors, including drag-and drop schedule adjustments;
- Summarizes student progress in one or two easy-to-understand pages;
- Shows students the impact of their decisions, such as deferring math, taking summer classes, or changing majors;
- Handles full-time, part-time, and transfer students equally well;
- Tracks checkpoint courses that can help predict a student's success in a major; and
- Easily interfaces with Schedule Planner
- Helps predict seat capacity based on actual future demand.

Smart Planner Impact

- Advisor Productivity
- Graduation Rates
- Retention Rates
- Student Academic Progress
- Student to Advisor Ratio
- Seat Demand Planning

Attribute	Definition	Impact
Advisory Productivity	The average number of students an advisor can reasonably be expected to assist	Without SP, advisors spend half or more of their time assisting students in planning courses for their upcoming semester
		With SP, advisors can spend little or no time assisting students in planning courses for their upcoming semester
		SP can assist students in optimizing their course sequences extremely quickly and efficiently
		Advisors can use the time saved to help more students select appropriate majors; to help more academically struggling students make better choices about courses and course loads and understand the academic assistance resources available to them

Attribute	Definition	Impact
Graduation Rates	The percentage of a school's first time, first-year undergraduate students who complete their program within 150% of the published time for the program. For example, for a four-year degree program, entering students who complete within six years are counted as graduates.	SP defines a clear path to graduation
		Students are empowered and motivated to make meaningful progress toward graduation
		Increases student retention
		Graduation rates improve when students know when their last term is scheduled to happen

Attribute	Definition	Impact
Retention Rates	Retention rate is the percentage of first-time, first-year undergraduate students who continue at that school the next year. For example, a student who studies full-time in the fall semester and keeps on studying in the program in the next fall semester is counted in this rate.	SP frees advisors from the drudgery of creating recommended study plans for students each semester
		Advisors use the additional time to review academic progress and discuss decisions about courses, course loads, majors, and resources available for academic assistance.
		Students make better, more informed decisions about courses, course loads and majors and avail themselves of academic assistance
		More students experience academic success
		More freshmen return as sophomores

Attribute	Definition	Impact
Satisfactory Academic Progress	Satisfactory academic progress is used to define successful completion of course work to maintain eligibility for student financial aid and to avoid other administrative actions, such as administrative probation or disqualification	SP frees advisors from the drudgery of creating recommended study plans for students each semester
		Advisors use the additional time to review academic progress and discuss decisions about courses, course loads, majors, and resources available for academic assistance.
		Students make better, more informed decisions about courses, course loads and majors and avail themselves of academic assistance
		More students experience academic success
		More students remain eligible for student financial aid

Attribute	Definition	Impact
Student to Advisor Ratio	Median case load of advisees per academic program advisor	SP frees advisors from the drudgery of creating recommended study plans for students each semester
		Students who are performing well in their chosen majors may be adequately served in the planning efforts by SP alone
		Advisors can focus their efforts on students struggling academically, transfer students, and students nearing graduation
		Students are better served since their advisors have more time to spend on the advising that "really matters".

Attribute	Definition	Impact
Seat Demand Planning	Planning intended to minimize the difference in the number of seats planned by students for a course over the number of seats that are being offered in all enrollment sections of a course	SP captures actual future demand
		Department chairs plan enrollment to meet the actual future demand
		More students can enroll in needed classes without being placed on waitlists
		Reduces the amount of time spent on scheduling, enrollment management, and hiring of new faculty