

**No Holding Back: Using Data to Review Administrative and/or Student Success Hold Policies
Among Public Postsecondary Institutions in the Western Region**

Request for Proposals

The Western Interstate Commission for Higher Education and the American Association of Collegiate Registrars and Admissions Officers are pleased to provide this Request for Proposals for the 2022 No Holding Back Community of Practice to use data to inform the review and revision of institutional administrative and/or student success hold policies that impact undergraduate, degree-seeking students. We look forward to receiving your application, which can be [accessed online](#), by noon MT on Wednesday, June 22, 2022.

Please send any questions to Jenn Raby, jraby@wiche.edu. Questions may be submitted until June 8, 2022; responses to any question will be shared with all applicants by June 10, 2022.

Background Information

[Lumina Foundation](#) and [Ascendium Education Group](#) have jointly awarded \$452,500 in grants to WICHE and AACRAO to help institutions better understand the impact that the practice and policies of administrative and/or student success holds can have on student success. The project will collaboratively build upon [existing work](#) by AACRAO. Twelve postsecondary institutions in the WICHE region will be selected from a pool of applications to participate in a 15-month community of practice. Read the press release [here](#).

General Information

Purpose: The goal of this project is to give institutions tools to (re)evaluate their administrative and/or student success hold policies to improve student success and to better use their data in policy formation. The selected institutions will participate in a community of practice over the course of 15 months and receive support from WICHE and AACRAO as they go through the exercise of collecting, cleaning, and analyzing administrative hold data and revising policies based on those findings. The selected institutions will participate in an in-person training in Boulder, Colorado at the start of the project beginning at noon on August 3, 2022 and ending at noon on August 4, 2022, and will meet virtually every quarter for two hours for the next year.

Ultimately, two written works will come out of this project. WICHE will distill findings and lessons learned from this project in a seminal brief on the influence of policy on practice that includes qualitative findings from interviews and focus groups with students and administrative and business leaders from the participating institutions. AACRAO will develop a technical handbook that will allow other institutions to replicate the work. The technical handbook will focus on data identification, data cleaning, and analysis efforts. In addition, it will aim to have data collection guidance for common student information systems.

Who may apply: Institutions that are members of the Western Academic Leadership Forum and Western Alliance of Community College Academic Leaders may apply. If your institution is not yet a

member of the [Forum](#) or [Alliance](#) (as indicated on these linked webpages) but is interested in membership, please contact Jenn Raby jraby@wiche.edu no later than June 10, 2022.

Number of awards: 12 institutions, with participants selected from both two- and four-year institutions that are members of the Alliance and Forum will be selected. Institutions must demonstrate the capacity and interest in providing the necessary data, analyzing institutional data and (re)evaluating current administrative and/or student success hold policies. Priority will be given to institutions with 40% or greater Pell-eligible enrollment though all Forum and Alliance members are encouraged to apply.

Compensation: Institutions will receive a \$7,500 stipend for participating; paid travel to attend the in-person training in Boulder, Colorado for up to 3 staff in early August 2022; technical support throughout the project; a community of practice with virtual quarterly meetings with other participating institutions and project staff; an opportunity to present findings at the Annual Meeting and in a virtual final convening open to the field.

Institution Teams: Participating institutions will be required to assemble a cross-unit team of 4-6 staff to support the project. Suggested team members include: the registrar, a member of the institutional research team, an IT analyst, a leader in the finance/student accounts team, a leader in student affairs, and an administrative champion.

Key Participation Activities Timeline

May 25, 2022	RFP announced at 12pm MT
June 22, 2022	RFP closes at 12pm MT
July 1, 2022	Selected institutions will be notified
Aug. 3-4, 2022	Institutions participate in an in-person training in Boulder, CO to meet each other and project staff; hear from institutions who participated in the original AACRAO research study; learn best practices on collecting and analyzing administrative hold data; and share proposed goals and potential challenges with each other
Aug. '22- Feb. 2023	Institutions will collect and analyze data with support from AACRAO Institutions will participate in Quarterly Call # 1: focus is on sharing updates related to data collection and analysis (November 2022) Institutions will participate in Quarterly Call # 2: the focus is on reviewing the data findings from the institutions and brainstorming and sharing ideas for how institutions might take this information back to campus and change institutional policies (February 2023)
Mar - June 2023	Institutions will draft proposed changes to administrative hold policies Institution leadership and students will participate in focus groups and/or interviews with WICHE (March 2023) Institutions will participate in Quarterly Call #3: the focus is hearing how this work has influenced change at the participating institutions and discuss ways other institutions can learn from this work (June 2023)
October 2023	Institutions participate in final convening (virtual)

Application

Below is the list of questions you will be asked to complete. We recommend you download this document and draft your answers below. You may submit your responses [via this form](#) by June 22, 2022, at noon MT.

Please provide us with basic contact information for your application. The person submitting this application must have the authority and take responsibility for moving the project forward, if accepted.

- What is your contact information?
 - Name
 - Title
 - Phone number
 - Email address
- What is the name of your institution?
- What is the IPEDS ID of your institution? We will use this information to gather institutional data such as geographic location, full time equivalency, Carnegie classification, percent Pell eligible enrollment to ensure our community of practice represents the diversity of institutions in the West.
- What student information system does your institution use?
 - Banner
 - PeopleSoft
 - Colleague
 - Other: _____

Please indicate your understanding of the participation requirements by answering the following questions:

- I confirm that my institution has the staffing capacity to assemble a cross-sector team to participate in the study. [yes/no]
- I confirm that, to the best of our ability following the technical guidance provided by AACRAO, my institution will collect and analyze the data elements found in this tentative [data dictionary](#). These data elements will allow my institution to determine factors such as [yes/no]
 - Pre/post project participation hold use at each institution; determine dollar amount threshold pre/post exercise at each institution
 - Data delineating the use of holds by student characteristics
 - If applicable, the average unpaid debt amount associated with each hold
- I confirm that my institution leadership will suggest changes to our current administrative hold policies and practices after reviewing the data analysis. [yes/no]
- I confirm that three members of our institution team will attend the in-person training in Boulder, CO on August 3-4, 2022 if selected. [yes/no]
- I confirm that my institution will provide as detailed as possible quantitative summaries of our analysis of the use of holds, including by student characteristics and financial amounts. [yes/no]

- I confirm that my institution will provide a narrative summary of the challenges, successes and recommendations for policy and practice related to the project including why institutional policies and practices were or were not changed. [yes/no]
- I confirm that institution leaders are able participate in an interview or focus group with other postsecondary leaders to discuss administrative and/or student success hold policies on campus. [yes/no]
- I confirm that we can identify current and former students who have experienced administrative and/or student success holds and make the initial contact with the students informing them of the request to participate in a focus group or short interview. [yes/no]

Comment:

Please share with us your interest in participating in this community of practice (200 words or less for each question):

- What are you hoping to accomplish by participating in the No Holding Back Community of Practice?
- How will participating in this community of practice better support your students from low-income backgrounds, students who are first in their family to attend college, or students of color?
- What is the process for revising campus policies (such as administrative hold policies) on your campus? Who are the decision makers? How do decisions get made and implemented?
- Please give an example from the last five years of how your institution has used data to inform policymaking decisions. Provide an example that is most relevant to administrative and/or student success hold policies.
- What challenges might you face in collecting, cleaning, and analyzing the data elements found in this proposed, tentative [data dictionary](#)?
- What challenges might you face in changing administrative and/or student success hold policies?
- How might you mitigate the challenges you listed in the previous two questions?

Please provide us with some information on your institution's administrative and/or student success hold policies (200 words or less for each question):

- What current administrative and/or student success hold policies and practices does your institution have? Please describe as well as provide links.
- What kind of administrative holds does your institution currently use (multiple choice):
 - Transcript holds associated with an unpaid debt
 - Transcript holds associated with other factors
 - Registration holds associated with an unpaid debt
 - Registration holds associated with other factors
 - Both registration and transcript holds associated with and unpaid debt
 - Both registration and transcript holds associated with other factors
 - Other _____
- Are you able to identify the specific dollar amount of a financial hold? [yes/no]

- Are you able to see all holds applied even if they are resolved? That is, when the hold is resolved does the record of that hold still exist or is it removed in its entirety? [yes/no]
- What year was your institution's policy on administrative and/or student success holds first implemented?
- When was it last revised?
- Please provide details of the primary changes since initial implementation. If none, please reply N/A.
- What is the minimum unpaid balance for which a hold will be placed?

Please share with us your institution team:

Each institution's self-selected team will develop from what AACRAO learned during the 2021 research project. We suggest that these teams include 4-6 individuals from the following roles:

- Registrar
- a member of the institutional research team
- a leader of the finance/student accounts team
- an IT analyst
- a leader in student affairs
- an administrative champion

Who will be the Project Team Leader?

- Name
- Title
- Email
- Phone

Team Member 1

- Name
- Title
- Email
- Phone

Team Member 2

- Name
- Title
- Email
- Phone

Team Member 3

- Name
- Title
- Email
- Phone

Team Member 4

- Name
- Title
- Email
- Phone

Team Member 5

- Name
- Title
- Email
- Phone

Thank you for your interest in this study. We are accepting applications through June 22, 2022 and will notify applicants if they have been selected to participate no later than July 1, 2022.