**Success Program Goals Dashboard**

The [**Success Program Goals Dashboard**](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/f5f92230-67ac-4766-aff1-7a80c3bdf746/ReportSection?bookmarkGuid=Bookmarkbd33849e5a0e2d1beb04)is one of the core reports used by the Programs teams across all regions. Its main purpose is to highlight the progress made towards the Goals outlined by the Success Program Leadership.

The dashboard contains 4 main Navigation components:

1. [Quick Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#quick-slicer-menu)
2. [Expanded Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#expanded-slicer-menu)
3. [Cards - including Fall/Spring toggle](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#cards)
4. [Graph/Gauge Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#graph-gauge-views)

The Data Elements featured are:

1. [Fall/Spring Student Engagements](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#fall-spring-student-engagements)
2. [Fall/Spring Contact Attempts](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#fall-spring-contact-attempts)
3. [Fall/Spring # of Different Modes of Communication](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#fall-spring-of-different-modes-of-communication)
4. [Fall/Spring Enrollment](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#fall-spring-enrollment)
5. [Fall/Spring Bills Paid](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#fall-spring-balance-paid)
6. [FAFSA Processed](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#fafsa-processed)
7. [Fall/Spring % Credits Earned](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#fall-spring-credits-earned)
8. [Winter/Spring Reflective Conversations](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#winter-spring-reflective-conversations)
9. [E-Milestones Completed this Year](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success-Program-Goals-Dashboard.aspx#e-milestones-completed-this-year)

Check out a brief (7 min) video tutorial for this dashboard [here](https://web.microsoftstream.com/video/af1ebeab-3563-4735-9b05-6dc40dee279c).

Success Program Goals Dashboard

**Navigation**

**Quick Slicer Menu**

* **Definition**: The Quick slicer menu is a report element that allows you to view up to 9 different filtering options for navigation within the dashboard's main page
* **Purpose:**Allows us to filter (slice) the data by a variety of options, such as a student's name, enrollment status, etc. Unlike the Expanded slicer menu, the Quick slicer menu makes the most relevant/most frequently used slicers easier to access within the report​​​​​​​
* **Example:​​​​​​​**​​​​​​​

Example of Quick slicer menu options- actual slicer choices may vary by dashboard

**Expanded Slicer Menu**

* **Definition**: The Expanded slicer menu is a report element that allows you to view a complete list of all the different reporting options
* **Purpose:**Allows us to filter (slice) the data by a variety of options such as a student's name, enrollment status, etc. Unlike the Main slicer menu, the Expanded slicer menu offers more options for filtering the data and allows the user to further customize their report beyond the 9 slicers previewed in the Quick slicer menu​​​​​​​
* **Example:**

**​​​​​​​**

Example of Expanded menu options- actual slicer choices may vary by dashboard. To access the Expanded slicer menu, click the "More" button located in the bottom-right corner of the Quick slicer menu. The Expanded menu includes additional filtering options beyond the Quick menu's offerings

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**Cards**

* **Definition**: Cards are a report element that highlight summarized data
* **Purpose:**Allows us to quickly visualize key information (i.e. total # of students in a certain category) ​​​​​​​
* **Example:**

**​​​​​​​**

The Success Program Goals Dashboard shows the same three cards regardless of the semester. Displayed data adjusts to reflect semester-specific numbers

**Graph/Gauge Views**

* **Definition**: Graph/Gauge views are visual representations of student data in its aggregate form
* **Purpose:**Visuals allow us to quickly process large volumes of student data- they facilitate understanding and identification of trends, as well as giving us a reference for progress towards goals
* **Example:​​​​​​​**​​​​​​​

This dashboard shows 8 different visuals depending on your semester choice in the Fall/Spring toggle.

An additional 9th visual is also featured as a toggle option for the "Contact Attempts" goal. This toggle turns the gauge into a bar graph that shows the different modes of communication used to try to engage with students

**Data Elements**

**Fall/Spring Student Engagements**

* **Definition**: The number of meetings (engagements) a student has had throughout the Fall/Spring semester.
* **Calculations, Filters, & Logic**: Only active students count towards this goal, and only Meetings (Events) are counted. Tasks do NOT count towards this goal.    
  This goal is time-bound. In other words, there are specific Start and End dates that determine which engagements will be counted. To check the dates for this academic year, go to your Success Program Goals dashboard and hover your mouse over the Student Engagements graph to read the tooltip.  
  The graph itself shows the percent of students who fall within our four defined categories:
  + 0-> students with no engagements during the selected semester. Will appear in the graph color-coded red
  + 1-> students with one engagement during the selected semester. Will appear in the graph color-coded yellow
  + 2-> students with two engagements during the selected semester. Will appear in the graph color-coded yellow
  + 3-> students with three or more engagements during the selected semester. Will appear in the graph color-coded green
* **Why do we need it?**to ensure our students are receiving support and services from Bottom Line on a regular basis​​​​​​​
* **Where do I enter this information?**a thorough description of how to log a Meeting in Salesforce can be found in the [Salesforce Knowledge Base](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx#contact-attempts)**​​​​**

Example of Student Engagement graph visual

**Fall/Spring Contact Attempts**

* **Definition**: the number of times an advisor has attempted to reach a student through phone calls, text messages, emails, social media, or any other mode of communication
* **Calculations, Filters, & Other Considerations**: The Contact Attempts goal states that an advisor must record at least 15 contact attempts for each Active student who has NOT had a meeting during the current semester, using at least three different modes of communication.

This is our denominator. We calculate it by multiplying the # of students with zero engagements times the 15 contact attempts needed.

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These are our progress numbers in both # and % forms. The progress number is calculated by counting the number of contact attempts each student has on record (up to 15 per student)

* **Why do we need it?**to ensure that we are doing everything we can to re-engage students we haven't heard from in a while. We know that sometimes students have something come up in their lives that makes them more hesitant to call us, and that our patience and persistence is key to re-engaging those students so they can continue making progress toward their degree.​​​​​​​​​​​​​​
* **Where do I enter this information?**a thorough description of how to log a Contact Attempt in Salesforce can be found in the [Salesforce Knowledge Base](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx#contact-attempts)

Log in contact attempts by clicking your "Log Contact Attempt" tab and completing all the relevant information

Contact attempts also

**Fall/Spring # of Different Modes of Communication**

* **Definition**: a count of the different forms of communication through which an advisor has attempted to contact a student. Examples include: phone calls, text messages, emails, social media, etc.
* **Why do we need it?**to ensure that we are doing everything we can to re-engage students through whatever mode of communication they are most receptive to​​​​​​​
* **Where do I enter this information?**This data point is captured through the "Contact Attempt Method" drop-down menu when you log a new Contact Attempt **​​​​**

Indicate the Contact Attempt Method by selecting the best choice from the drop down menu. Note: All contact attempts will show as a "call" on the student's timeline. Don't worry about this! As long as you indicate the contact method, your work has been saved correctly and you will see it reflected in the Advisor Caseload Dashboard

**Fall/Spring Enrollment**

* **Definition**: The enrollment status indicates whether a student is attending college or not
* **Why do we need it?**Allows us to track persistence and inform service planning​​​​​​​
* **Where do I enter this information?**Enrollment is captured under the Critical Data section of the Student Record

**Fall/Spring Balance Paid**

* **Definition**: The status of the student's bill during that term
* **Why do we need it?**Allows us to track progress towards the affordability goal​​​​​​​
* **Where do I enter this information?**Balance Pa​id is captured under the Critical Data section of the Student Record

**FAFSA Processed**

* **Definition**: The status of a student's "FAFSA Processed" task. A FAFSA Processed task entails verifying that a FAFSA was processed by FSA, received by the school(s) listed by the student, and confirming if additional requirements or verifications are needed to complete or renew financial aid
* **Why do we need it?**Allows us to track financial aid information that informs our program's[affordability goals](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/a-is-for-affordability.aspx) ​​​​​​​
* **Where do I enter this information?**some financial aid tasks are [automatically generated](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#automated-scheduled-tasks), while others must be [created by advisors](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#advisor-created-tasks). The FAFSA Processed task will be automatically generated for you, only if your student is deemed FAFSA-eligible based on their citizenship status. Consult the Salesforce Knowledge Base to get a full overview of how to [manage financial aid tasks](https://tbl500amory-my.sharepoint.com/personal/mbarton_bottomline_org/_layouts/15/onedrive.aspx?id=/personal/mbarton_bottomline_org/Documents/1.%20Program%20Ops%20Documentation/Financial%20Aid%20Task%20Management.pdf&parent=/personal/mbarton_bottomline_org/Documents/1.%20Program%20Ops%20Documentation&ga=1) for your students, or to learn more about [tasks in general](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx)

**NEED INFO ON IF FAFSA PROCESSED IS NOT PURSUED**

**Fall/Spring % Credits Earned**

* **Definition**: The total number of credits completed by the student during a semester term and counted towards completion of a degree
* **Why do we need it?**A​​​​​​​llows us to track progress towards degree completion​​​​​​​
* **Where do I enter this information?**Credits Earned are captured under the Critical Data section of the Student Record**​​​​​​​**

**Winter/Spring Reflective Conversations**

* **Definition**: The status of a students' reflective conversation during the Fall (Winter) or Spring (Summer). This gauge will only increase if the task for the specific Reflective Conversation is marked as "Completed"
* **Why do we need it?**Reflective conversations are vital to understanding our students' experiences and facilitating a collaborative goal-setting process. They are an important part of the [assessments period](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx) because they help strengthen the relationships between students and advisors, [encourage reflection](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx#reflective-conversations), and allow us to improve our service planning via the [collection of crucial data](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessment-Data-Collection-Guide.aspx) that might have been missed throughout the semester.​​​​
* **Where do I enter this information?**some tasks are [automatically generated](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#automated-scheduled-tasks), while others must be [created by advisors](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx#advisor-created-tasks). The Reflective Conversations tasks will be automatically generated for you. Consult the Salesforce Knowledge Base to get a full overview of the [Assessments process](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Assessments.aspx), or to learn more about [tasks in general](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Tasks.aspx)

**E-Milestones Completed this Year**

* **Definition**: The total number of employability milestones a student has completed during the current academic year
* **Why do we need it?**Allows us to track any progress made during the *current academic year* towards the overall completion of employability milestones​​​​​​​
* **Where do I enter this information?**Employability milestones are sequential and often build on each other. For this reason, an initial set of e-milestones will be automatically generated for your students when their Salesforce record is first created. To learn more about the E-milestones, their sequence, and how to enter them, consult the Salesforce Knowledge Base's section on [Employability Milestones](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx)