Postsecondary Data Partnership
Tableau Dashboard Analysis Quick Guide

Retention/Persistence Term-to-Term Dashboard

American Institutes for Research

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Overview

The [Postsecondary Data Partnership (PDP) Tableau dashboard tool](#) reports key performance indicator (KPI) and other key data. The dashboards are intended to aid in the discovery of notable trends and insights in the data and to facilitate communicating these findings to institutional stakeholders, identifying areas for improvement, setting goals, and designing and implementing initiatives. Each dashboard allows you to look at an institution's progress toward student success through the lens of a different KPI or other important metric. The dashboards also allow you to filter and disaggregate the data across a variety of relevant student-level characteristics.

This quick guide focuses on the retention/persistence term-to-term dashboard which provides term-to-term retention and persistence rates by cohort year for the first 2 years of enrollment.

For general information on using the [PDP Tableau dashboard tool](#), see the *[Postsecondary Data Partnership Tableau Dashboard Analysis Quick Guide: Dashboard Tool Overview](#)* document. This document contains the general purpose of the dashboards, a menu of the available suite of dashboards, definitions for KPIs and other important PDP concepts, information on the student-level filters and dimensions available to refine and disaggregate the dashboards, subgroup gap analysis, and important considerations to keep in mind when using the dashboards.

For questions regarding technical support for the [PDP Tableau dashboard tool](#) (e.g., login issues), contact PDP customer support at PDPService@studentclearinghouse.org. You can reach the Postsecondary Partnership Research Center at 703-742-4427.

Retention/Persistence Term-to-Term Dashboard

Description and Purpose

The retention/persistence term-to term dashboard shows what happened to students after each term during their first 2 years. Students either enrolled at the cohort institution in the term or had completed a credential before the end of the term at the cohort institution (retained), enrolled at a transfer institution in the term or had completed a credential before the end of the term at a transfer institution (persisted), or were not enrolled and had not completed a credential (not enrolled). Although the retention/persistence dashboard allows you to see the overall first-to-second year retention rate, the retention/persistence term-to term dashboard allows you to pinpoint more precisely when students leave the cohort institution. The dashboard also may reveal stopout behavior during the first 2 years of enrollment. That is, you may observe points during the first 2 years where retention increases, indicating that students have stopped out but then returned to the cohort institution. The dashboard requires that you limit the dashboard data to a specific entry term using the *Cohort Term* filter (i.e., "Fall," "Winter," "Spring," "Summer"). The dashboard also defaults to showing you all possible terms that a student could have retained, persisted, or not enrolled into regardless of whether that term is relevant at your institution. However, you can use the *Term Name* filter to limit the dashboard data to relevant terms. For example, if your institution does not enroll students in the winter term, you can deselect "Winter" from the *Term Name* filter.

Key Questions

This section provides a list of key questions to ask as you begin to use the dashboard. These are intended as a jumping-off point to facilitate your use of the dashboard tool.

- What proportion of your institution's students were retained after each subsequent term during their first 2 years?
- What proportion of your institution's students persisted after each subsequent term during their first 2 years?
- Which students have neither completed a credential nor remained enrolled after each subsequent term during their first 2 years?
- Which students were most likely to stop out during their first 2 years?

A Practical Application

This section provides a look at how a fictitious institution of higher education successfully used the dashboard data to inform a student success initiative. *The example uses fabricated data for illustrative purposes only.*

Stakeholders at Frontier Hills University had recently discovered through the retention/persistence dashboard that Pell Grant recipients had lower first-to-second year retention rates than their non-Pell Grant recipient counterparts. They noticed that this was particularly true for cohorts that entered the university in a fall term. The stakeholders decided to use the retention/persistence term-to-term dashboard to investigate whether there were differential patterns of retention for the two groups on a term-to-term basis. They first looked at term-to-term retention overall for fall entrants in the 2016–17 cohort, using *Select Cohort:* to filter by "2016–17" and *Retention/ Persistence* to filter by "Retention." Frontier Hills does not enroll students in winter terms (Term 2 and Term 6); therefore, they used the *Term Name* filter to deselect "Winter," As shown in Exhibit 1, the 2016–17 cohort was all retained in Term 1 (fall 2016), while only 75% were retained in Term 3 (spring 2017). In Term 8 (summer 2018), 50% of the cohort were retained at the university.

Exhibit 1. Retention/Persistence Term-to-Term Dashboard View 1: Frontier Hills University, Term-to-Term Retention

Retention by *Overall*
Color = Overall
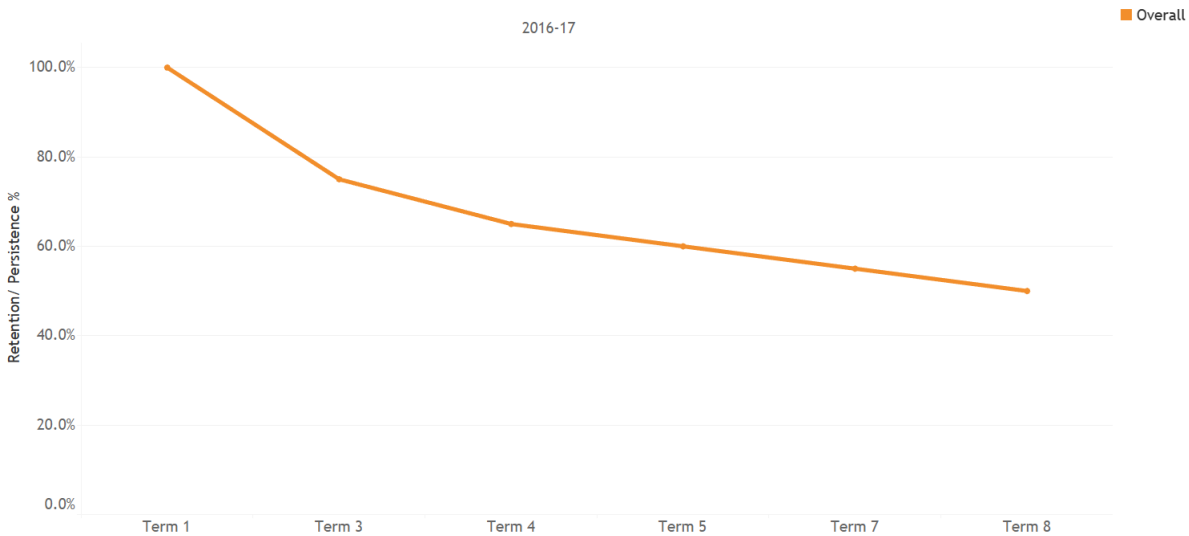
To investigate whether these patterns differed by Pell Grant recipient status, stakeholders at the university next disaggregated the dashboard data by "Pell Grant Recipient" (using *Select Dimension*). As shown in Exhibit 2, non-Pell Grant recipient retention (dark gray bar) fell to 80% in Term 3 (spring 2017) while Pell Grant recipient retention (light gray bar) fell to 65%. The stakeholders noticed that after this initial drop, although retention continued to decrease for each group, the percentage-point difference in retention remained stable between the two groups, at approximately 15 percentage points. Based on these findings, the stakeholders discovered that the spring of the first year of enrollment was a key loss point for fall-entry students at the university and, in particular, Pell Grant recipients.

Exhibit 2. Retention/Persistence Term-to-Term Dashboard View 2: Frontier Hills University, Term-to-Term Retention by Pell Grant Recipient Status

Retention by *Pell Grant Recipient*
Color = Pell Grant Recipient

2016-17

■ No
■ Yes
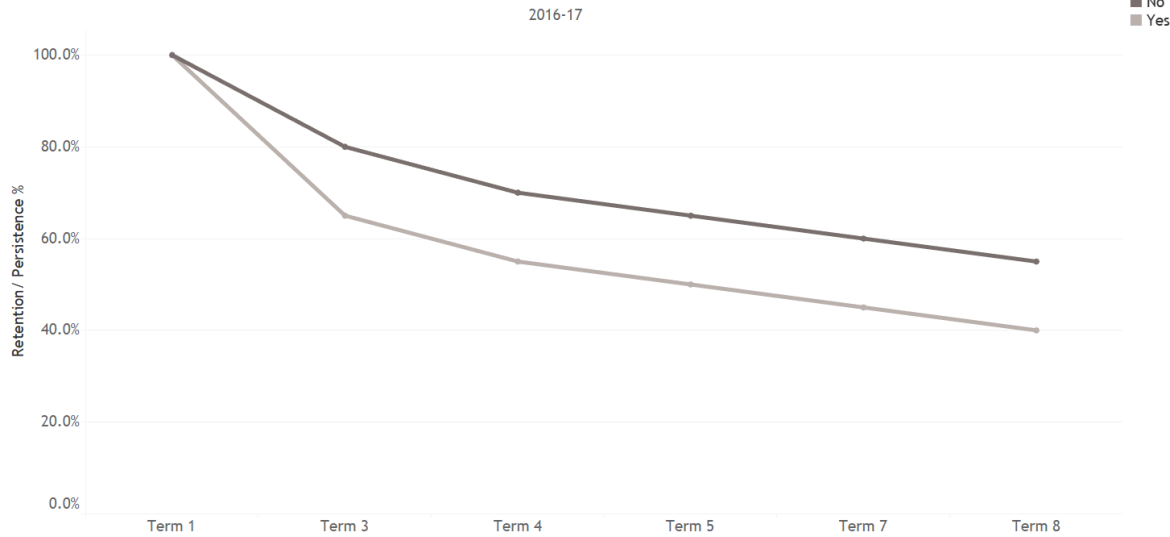
This finding prompted Frontier Hills University to investigate further why Pell Grant recipients are more likely to leave the university before the spring of their first year. The university established a committee to take on the investigation, which included determining the resources and supports available to these students in the first term and whether these students were aware of the available resources or using the available resources. The committee also conducted focus groups with Pell Grant recipients during their fall term to better understand why they may or may not want to remain enrolled at the university.