**Sample Agenda for First Coaching Visit**

*Source: Adapted with permission from Achieving the Dream*

Purpose: This sample agenda can serve as an outline for the coach to draft the agenda for their first visit with the college. Agenda planning should be collaborative between the coach and the college but, especially for the first visit, the coach may drive some of the initial thinking—still, be sure to share your plan with the college in advance, especially if pre-work is required.

**Participate in “Rollout of Student Success” activities, if applicable**

**Debrief if any engagement prior to first site visit**

* What did you learn?
* What progress have you made since then?

**Overview of Student Success Teams**

* Structure
* Membership
* Goals and objectives

**Reviewing data, defining a research agenda, and case making**

* Discuss what a culture of evidence to support decision making includes
* Review foundational data needs for student success work
* Review currently available disaggregated enrollment, retention, progression, and completion data
  + Where are students losing momentum? What concerns you the most?
  + Which equity gaps are unacceptable? Where do you see the most urgency with respect to student success?
  + What do you know / what hypotheses do you have about the root causes of these problems?
* Identify additional information needed to know to understand root causes, and where to get that information
  + How will you incorporate student voice?
  + Best practice at other institutions?
* Define the most important/troublesome/urgent student progress patterns
  + Where do you see the most opportunity for creating urgency to improve?

**Reviewing current student experience: structure, processes, challenges, and opportunities**

* Admissions, financial aid, registration, and other business-process issues
* Academics
  + Developmental vs. gateway course placement
  + Academic maps
  + Math pathways
  + Academic supports
  + Adjunct engagement
* Student services
  + Onboarding
  + Advising
  + Holistic supports
* Professional development

**Introduction to guided pathways**

* Rationale
* Overview of essential elements
* Evolution of strategy and implementation at each stage
* Embedding equity

**Review planning process: organization, timelines, and deliverables**

* Research agenda
* Mapping ideal student experience
* Identifying gaps between current and ideal student experience
* Assessing institutional capacities
* Developing strategies to close gaps using pathways methodology
* Faculty-staff engagement
* Communication and information sharing

**Share resources and tools**

**Set a date for next visit and decide on action steps by coach and college stakeholders before then**

**Complete coaching team “exit” conversation with president/primary contact at college to debrief the first visit**