

RESEARCH BRIEF

CASE STUDY

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From Goals to Graduation to Post-Completion Success: Why Every Student Needs an Educational Plan

CASE STUDY 2:

Aligning Careers, Programs, and Costs: How Student Success Plans Transformed the New Student Experience at Southwest Wisconsin Technical College

By Hana Lahr

College-wide transformation is not usually a fast process, but Southwest Wisconsin Technical College (SWTC)—a rural college with about 3,700 students in credit programs and 2,500 in noncredit programs—shows how an institution can redesign how it helps every student make an integrated career, educational, and financial plan in just a few years.

Previously, many students found themselves adrift. As Cynde Larsen, chief academic officer, observed, “Before we were pulling drowning students out of school in the first week. You told us to walk upstream to see why they were falling in. They were enrolling in programs they didn’t understand and spending more money than they thought. They didn’t understand what to expect.” Today, however, by taking the guesswork out of their education, students are making more informed program decisions aligned with their career goals.

SWTC’s transformation offers several lessons in organizational change that could benefit other institutions. First, college leaders positioned the career, educational, and financial plans, called Student Success Plans (SSP), as a college-wide responsibility, not simply as an advising reform. Messaging and reorganizing staff around SSPs made them central to supporting students’ success. Second, the college demonstrates how adopted technology should follow rather than guide the planning processes. Finally, the rapid expansion of the SSPs to students in dual enrollment and adult basic education programs shows how a redesign can include all student groups.

This case study of Southwest Wisconsin Technical College is based on interviews with 19 administrators, staff, and faculty conducted via Zoom in April and May 2026. It tells the story of how SWTC used SSPs to redesign the student experience, and how the entire college community got involved in the process.

The Motivation for Change

In 2023, when SWTC committed to redesigning the student onboarding process, college leaders wanted all entering students to receive guidance and support for developing a clear plan to meet their education and career goals. In examining existing processes, the team realized that less than half of programs required an initial advising meeting and that because of inconsistent advising requirements, many students did not clearly understand how different programs might prepare them for short and long-term career opportunities. Additionally, the team found that many students struggled to stay enrolled because of incomplete information around the costs associated with attending college.

The vision was clear: The college would require every new student to develop a Student Success Plan (SSP) with three parts: a career plan, an academic and support plan, and a financial plan. In 2025, the SSP evolved to include a faculty-student touchpoint. To achieve adoption at scale, SWTC required students to complete the career and academic plans *prior* to being accepted into the college. But even after being accepted, they still could not register until they had completed their financial plan. By making these steps mandatory for admission and registration, 100% of incoming students now complete all three parts of the SSP. Having an SSP ensures that students can see their individualized path to achieving their academic and career goals, including the timeline and associated costs. The inclusion of the faculty-student touchpoint makes faculty an integral part of students' career development process, particularly around helping students to clarify their career goals and make connections in their field of interest.

"I think it has made things more equitable in the way that this is work that we were already doing, but I don't necessarily know if we were doing it with every student," one advisor explained. "Because when it's not something that you're consistently doing, or have a process, or a plan, or a way to do it, and track it, it's not necessarily something you're doing every time."

The SSPs became an organizing framework for supporting students' post-college success. But the team rolled it out as a coordinated college-wide effort to help students make informed decisions about careers and programs from the very start of students' educational journey. "Success plans have opened up more [opportunities] for students to ask more questions," one advisor said. "[Students] seem to be more aware of return on investment and that sort of thing." In the following sections, we describe in more detail the components of the Student Success Plans as well as the college's approach to scaling SSPs.

How Students Develop a Student Success Plan at SWTC

Developing an SSP begins with a **career success plan** to help students identify a five-year career goal and connect that goal to an educational pathway. Through conversations with a recruiter or advisor, students explore their career interests, discuss program options, and confirm their academic direction. Career assessments help students identify strengths, interests, and career opportunities that support informed program decision-making. Students may also learn from Xello, Holland Codes, or O*NET, and internal college dashboards that show what SWTC graduates earn in different fields. Students can also talk to recruiters and advisors who help them think about different interests and distinguish various career paths and associated programs. Advisors encourage students who are unsure of their program choice, as well as those interested in specific programs, to set up program tours, sit in on classes, or set up a job shadow with career services to explore their options and make sure the program is a good fit with their interests and goals.

Next, students make an **academic and support plan**. At this point, they have identified their five-year career goals and have chosen a program that will help them achieve this goal. During a mandatory advising meeting that often happens during new student registration, advisors load into students' online SSP accounts a curriculum map that includes the courses required to complete the program broken down by semester. From there, they work with their advisor to develop an individualized semester-by-semester plan that takes into account their timelines, prior credits, planned summer courses (if applicable), and other factors.

Support plans stem from students' responses to a success survey, which includes questions about their comfort with English and math, the number of hours they plan to work, if they are caring for children or other family members, whether they have access to food and reliable transportation, and other factors that could impact their success in college. Advisors note actionable items in the plan, then document in the online SSP app students' "to-do" items. As Holly Clendenen, chief student services officer, explained, the support plan anticipates challenges students may encounter based on their survey results:

Depending on what comes up in that survey, we may connect them with our academic success coaches, which are our tutors. Sometimes it won't necessarily be academics they're worried about, but time management or study skills. The other piece is connecting our students to external resources that can help them. Sometimes that's financial, but sometimes it's also childcare or job assistance. We're trying to do that with all of our students before they actually start in order to reduce some of those barriers or challenges before they get into class.

Once students complete the academic and support plan, SWTC formally accepts them to the college.

Finally, students hold a one-on-one meeting with a financial aid advisor to make a **financial plan**, the last step before they can register for classes. During the onboarding process, students complete the Free Application for Federal Student Aid, known as FAFSA, then work with a financial aid team member to map out the total cost of college using a budget worksheet that prompts them to include not only tuition and fees, but also rent or mortgage, child care, subscriptions, gas, and food. The tool then asks about income, family support, scholarships, and grants. Using the student's total expenses and their income, the tool calculates a student's "gap" or unmet need each term, which determines

their eligibility for SWTC foundation scholarships. Foundation scholarships are awarded on a rolling basis with no application required for students with financial plans. The college prioritizes students with the biggest financial gaps; in the 2025-26 academic year, 52% of students with a financial gap had their gap reduced. As one advisor explained, the financial plan “takes all the guessing out by detailing tuition, fees, student housing, and program equipment alongside real cost-of-living expenses like rent, mortgages, childcare, fuel, and personal subscriptions.”

The fourth component of the SSP is the **faculty-student touchpoint**. First piloted in spring 2025, SWTC expanded it to all faculty in fall 2025. The impetus came from faculty wanting to be more involved in the SSPs and, in particular, having career conversations with students. Faculty start by asking students, “Is the five-year goal on your SSP still your five-year goal?” If not, they help students update their goals. Faculty then talk with students about work-based learning opportunities, help them make connections with industry contacts, and discuss strategies for applying for jobs and internships. Faculty document the responses to facilitate further communications with students.

Students benefit from these meetings, particularly the connections they make in their fields. “The key to us is that students get a professional network before they leave,” one academic administrator said. The response to these meetings has been positive from faculty and students.

After implementing SSPs in fall 2023, SWTC moved quickly to expand the planning process to students taking dual enrollment courses. The goal for students was minimizing “random acts” of coursetaking and ensuring that they enroll only in classes that apply to their program. For students still exploring their interests, the SSP conversation identifies courses that will apply to a range of majors. Although SWTC cannot require dual enrollment students to develop maps, it works with high schools to encourage students to create them. At the end of 2025-26, nearly 850 dual enrollment students (57%), had an SSP, and almost 80% with an SSP enrolled in at least one course identified in their SSP.

In another significant expansion, students now complete SSPs if they are enrolled in adult education programs, including English language courses; GED or HSED programs; and courses at the county jail.

While adult education students have always worked with faculty to lay out their courses, SSPs ensure they are thinking about careers from the start and developing a plan that shows them a path beyond a GED, HSED, or English language courses. Even though adult education is free, students also develop a financial plan that focuses on outside of college costs like transportation and shows what students can expect to pay if they choose to pursue further education at SWTC. As one adult education instructor said, “Through our [financial plan] process, and through our scholarships, ... it lets [students] understand that it is possible.”

How SWTC Scaled Educational Planning

In less than three years, SWTC scaled Student Success Plans to all new students and those taking adult education courses. The college has also made strides toward helping high school students taking dual enrollment courses develop SSPs. Staff and faculty shared several strategies that enabled this rapid adoption.

Positioning SSPs as an Institution-Wide Success Strategy

One reason many student success strategies never scale is the perception that they are the responsibility of one group of people within a college. Helping students choose a program and develop educational plans, for example, are often seen as the responsibility of advisors. At SWTC, however, SSPs are an institution-wide student success strategy and the responsibility of all administrators, faculty, and staff.

In 2023, while attending a student success institute, a group of SWTC administrators that included the then-president decided to make SSPs an institutional priority. Scaling the work required reorganizing and coordinating across front-end staff including recruiters, financial aid staff, advisors, adult education staff, and dual enrollment coordinators. SWTC also brought IT developers on board to design an SSP app and included institutional researchers when developing metrics and a research plan for assessing the impact of SSPs. Critically, faculty engaged through monthly career exploration events that featured different programs and enabled potential and current students to meet instructors and get hands-on experience in a program. Later, faculty involvement increased through the faculty-student touchpoints.

At the same time, college leaders sought approval from SWTC's Board of Trustees by presenting why SSPs are important for student success and helping board members create an SSP as though they were a student. The leadership team also shared (and continue to share) SSP-related data points at monthly board meetings, including the number of students with partial and complete SSPs, average student financial aid gaps, and other metrics.

Helping Students Consider Career and Post-Completion Opportunities

In many colleges, educational planning focuses on course selection. At SWTC, the process helps students to answer three key questions: (1) Where do I want to go? (2) What is the best educational path to get there? and (3) How am I going to pay for it? SSPs help students make informed decisions about their careers and educational goals and pathways. The college wanted to ensure students understand how different programs lead to different careers, employment opportunities, and long-term goals before enrolling.

"I'm passionate about student success plans because I was a student who needed a success plan," explained one staff member. "I was a hot mess out of high school, and I really had no idea what academic denial or financial aid suspension meant. ... My parents didn't graduate from high school. They didn't know what that meant. I didn't know what those things meant until I was on them. ... I'm super passionate about it, just because not everyone has someone to help them navigate. And sometimes if they do have people, it's not their world—they just don't know."

In our interviews, staff described how the new SSP-focused onboarding process helps students become informed consumers of postsecondary education by connecting career assessments, local employment opportunities, labor market information, graduate wage data, job shadowing opportunities, conversations with faculty and employers, and program planning. Advisors and recruiters participated in a semester-long course, Facilitating Career Development, at the University of Wisconsin–Madison about providing tools for career development and exploration. The goal was

ensuring students make “educated program decisions aligned with their career goals” rather than selecting programs without a clear understanding of career outcomes, explained Clendenen.

Standardizing Practices for All Students

College leaders and staff emphasized that one reason why SWTC could quickly scale SSPs was because of the sound practices already in place but not happening for every student. The key change was creating a common process so every student receives the same level of support for career, academic, support, and financial planning, and that advisors document and track these processes to know who has a partial or complete plan and who doesn’t. As one recruiter explained, the SSPs have “helped me recreate the good experiences for every student [and] make sure I’m not missing anyone.”

Additionally, the college made several key activities mandatory, including the now SSP-focused new student registration. For example, new student registration in spring 2024 helped all entering summer and fall 2024 students complete an SSP. Students meet with advisors to discuss their five-year career goal, then discuss programs, develop a full-program academic plan, and review their surveys. Then students meet with a representative from financial aid to make their financial plan for the upcoming year. Finally, students register and get their ID. New student registration runs from March to August and includes over 30 sessions.

Reorganizing Staff to Support Onboarding and Advising

To scale SSPs and to ensure they remain up to date, the college reorganized recruitment, onboarding, and advising staff to create teams focused on helping students develop and update the SSPs and ensure they were staying on track. The new staffing model includes two recruiters, two admissions specialists, one adult education registration assistant, two dual enrollment specialists, five advisors (assigned a caseload of students by program), an advising manager, four financial aid specialists, and a financial aid manager. A steering committee, including the financial aid managers, the registrar and admissions manager, advising manager, student support manager, and IT leadership, meets bi-weekly with the chief student services officer. Once a month, the teams involved in creating student success plans meet to discuss what is working well, discuss possible improvements, and participate in ongoing professional development.

Developing these teams took time. SWTC updated job descriptions to make the SSPs a bigger part of job responsibilities, prompting some staff to leave and others to take different roles. Once enrolled, students have a success network that includes a representative from the Academic Support Center, their advisor, and a financial aid representative. Students can see the names of their support network in their online portal. Each network meets weekly to review academic alerts and financial holds for their caseloads. During registration, continuing students with less than 24 credits or a grade point average less than 3.0 must meet with an advisor. Additionally, students who plan to transfer meet with an advisor to update their transfer plans and register.

Refining the Process Before Investing in Technology

Complicating educational planning for many colleges is the question of how to use technology to support rather than drive an educational planning process. SWTC was lucky not to be burdened

with an existing degree-planning tool when it launched SSPs in 2023. To avoid delays, leaders used shared Word documents, spreadsheets, and manual workflows. As Katie Glass, chief communications officer described, “Our attitude was, ‘We believe in this so deeply that even if we start and it’s not perfect, it’s better than what we were doing before.’ So we just got started.”

SWTC first determined what information students and staff needed, who would be involved in making the SSPs, when planning conversations would occur, and how various college departments would use SSPs. As a result, the college developed a process that reflected its goals and student needs. SWTC built a custom application integrated with its student information system only after establishing and refining the SSP process. Leaders emphasized that designing the process first allowed technology to support the work rather than dictate it and immediately let them plan for scaling rather than waiting for the perfect technological solution.

The IT programmers codesigned the custom SSP application after talking to advising and financial aid staff about their needs and students’ needs. The result is an app that integrates with the college’s student information system so faculty, students, advisors, and financial aid staff can access the SSP—though only students and financial aid staff can access financial information. Students must meet with advisors to change their plans.

Sustaining and Further Improving the Model

Since adopting the SSPs, there has been a decrease in the rates at which students earn a D, F, or withdraw (DFW) from courses. For example, new student DFW rates dropped from 20.8% in fall 2022 to 13.1% in fall 2025. Grade point averages also increased for incoming and continuing cohorts, with the biggest positive shifts for first-semester students. Among new students, grade point averages increased from 2.89 in fall 2022 to 3.11 in fall 2025, and for continuing students, GPAs rose from 3.09 in fall 2022 to 3.17 in fall 2025. And finally, SWTC recorded a retention rate of 75.9% among new students in fall 2024 to fall 2025, its highest rate since 2018-19.

SWTC has several plans for further strengthening the SSPs. One goal is to connect student plans with registration so that students can register directly from their academic plans. A related goal is to use the data on the academic plans to create course schedules that are more predictive and aligned with the courses students need. And finally, the college is hoping to develop an early alert system that connects with the SSPs including an off-plan registration alert if students register for courses not on their plans.

SWTC recently received a grant that will further expand the college’s work with students in adult education by hiring an adult education navigator who will work with students on the SSPs. Faculty will still update the SSPs as needed once students enroll in these courses. The grant also pays for up to six college credits for adult education students. For example, one recent student needed to finish the HSED and wanted to enroll in the automotive tech program. The grant funded courses that counted toward the HSED and the automotive tech program.

Conclusion

SWTC's implementation of Student Success Plans shows how to scale quickly and how to position career and educational planning as central to the entire program onboarding experience. By reorganizing roles and responsibilities around educational planning, and by engaging the entire college community—including faculty—in the planning process, SWTC transformed the new student experience.

For SWTC, reaching scale meant creating common expectations for every student, including students taking dual enrollment and adult education courses, while drawing on different people—recruiters, advisors, financial aid staff, faculty, and others—at different points in the journey. It meant making important planning conversations part of the normal path into and through college rather than services students had to know about and seek out. And it meant establishing those processes before deciding how technology should support them.

That distinction matters for institutions that, when implementing educational planning, conclude that they lack the advisors, staff, and/or technology to provide it at scale. SWTC's experience suggests a different question: How can colleges organize the people and resources they already have so every student gets the guidance and support they need to get off to a strong start in college?

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