Targeted Advising Campaigns 101
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Date Time: Jul 23, 2018 11:30 AM Eastern Time (US and Canada)

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  If you select the “Computer Audio” option, please be sure that your speakers or headphones are connected.

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  - International numbers available: https://zoom.us/u/nrdvwkZ5
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After the webinar, a member of our team will be in touch to follow-up on your questions individually.

Type your question here
Today’s Presenters

Brittany Motley
Strategic Leader

Trevor Hannum
Strategic Leader
1. What Is a Targeted Campaign?

2. How It Works: Five Steps

3. Successful Campaigns from Around the Collaborative

4. Available Resources
What Is a Targeted Campaign?

Proactive Intervention Focused on a Subpopulation With a Shared Risk Factor

**Traditional, Passive Advising**

- Students Receiving **General** Support
- Students With **Risk Factor**

**Proactive & Strategic Advising**

- Students Receiving **Tailored** Support
- Students With **Risk Factor**
1. What Is a Targeted Campaign?

2. How It Works: Five Steps

3. Successful Campaigns from Around the Collaborative

4. Available Resources
Step 1: Narrow Your Focus

Choose specific campaign objectives that align with personal goals for your student caseload or goals of your department/school.

Find areas for opportunity by combining:

- **First-hand experience**
- **Institutional student success data**

From there, define your campaign by choosing a handful of specific campaign objectives.

**Example: “Murky Middle” Finance Majors**

- **First person experience**: Finance majors often realize too late that they need extra help to pass advanced math.

- **Institutional data**: Finance majors with 2.0-3.0 GPAs drop out at a higher rate than students in other majors.

**Target group**: Mid-career Finance majors with 2.0-3.0 GPAs with high risk predictions and at least one missed Success Marker

**Objectives:**

1. Contact all identified students and encourage them to schedule an advising session
2. Schedule an advising session with 75% of identified students
3. Connect 50% of students with tutoring or other resources to work on their academic standing
4. Reduce these students’ risk of dropping out
Choose How You Will Measure Success
Select 3-6 Metrics Ranging From Immediate Actions to Long-Term Outcomes

What is the initial **action** you will take to kick off the campaign?

What do you hope students immediately do **in response** to your outreach?

What **behavior or action** do students need to take as a result of the campaign?

What is the **impact** you hope to see with this group in one term or one year?

**Examples:**
- # of emails
- # of follow-up calls

**Examples:**
- % response rate
- # of appts scheduled

**Examples:**
- % declaring major
- % attending tutoring

**Examples:**
- # improving GPA or avg. GPA improvement
- # obtaining scholarship

Full list of common metrics on pages 3-4 of the *Measuring Campaign Effectiveness* Toolkit
Step 2: Identify and Generate Your List

Pinpointing Students You Want to Target for Intervention

After setting an objective, identify your target list of students by selecting the parameters that will define this population.

1. **Select**
   Determine which filters to apply to best “capture” the desired student population.

2. **Generate**
   Use the Advanced Search to generate a list of students who will be part of the targeted outreach.

3. **Save**
   Save your list as a “Watch List” to monitor throughout the length of your campaign.
   
   **Note**: Name your list according to your institution’s naming convention (e.g., F18 1st Gen Freshmen)

4. **Export**
   Export your list as an .XLS for additional tracking and analysis.
Advanced Search Filters

Using the Platform to Generate Lists

Common Filters for Campaigns

- Grade or enrollment in a course
- Term GPA
- Cumulative GPA
- Advisor
- College/major/concentration
- Credit completion %
- Credits earned
- Term enrollment
- Transfer Student
- Risk level
- Missed Success Markers

Can’t generate your selected population with just the filters?

Use the ‘Upload a List’ Function

- Put all student IDs in column 1 of an Excel file
- Save it as a .csv
- Upload the list by going to ‘Watch Lists’
- Save as new or existing Watch List, using your institution’s naming convention for Watch Lists (e.g., S19 1st Gen Freshmen)

Check that your parameters generate a manageable number of students. We recommend 30 to 75 students.
Examples of Groups to Intervene with…

...And the Right Filters to Get There

<table>
<thead>
<tr>
<th>Campaign #1</th>
<th>Campaign #2</th>
<th>Campaign #3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Murky Middle Students</strong></td>
<td><strong>Students Not Earning All Attempted Credits</strong></td>
<td><strong>Students Not Yet Enrolled for Spring 2019/Fall 2019</strong></td>
</tr>
<tr>
<td><strong>Cumulative GPA:</strong> 2.5-3.0</td>
<td><strong>Credit Completion Ratio:</strong> 0-75%</td>
<td><strong>Term Enrollment:</strong> Currently not enrolled (Fall 2019)</td>
</tr>
<tr>
<td><strong>Risk:</strong> Moderate</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Optional:</strong></td>
<td><strong>Optional:</strong></td>
<td><strong>Optional:</strong></td>
</tr>
<tr>
<td><strong>Major:</strong> (Your Major)</td>
<td><strong>Major:</strong> (Your Major)</td>
<td><strong>Major:</strong> (Your Major)</td>
</tr>
<tr>
<td><strong>Student Classification:</strong> Freshmen, Sophomores, Juniors, Seniors</td>
<td><strong>Student Classification:</strong> Freshmen, Sophomores, Juniors, Seniors</td>
<td><strong>Student Classification:</strong> Freshmen, Sophomores, Juniors, Seniors</td>
</tr>
<tr>
<td><strong>Assigned Advisor:</strong> (Your Name)</td>
<td><strong>Assigned Advisor:</strong> (Your Name)</td>
<td><strong>Assigned Advisor:</strong> (Your Name)</td>
</tr>
</tbody>
</table>
Using Student Data Ethically

Be Mindful of the Psychological Effects of Identity Threat on Students

Use a lens of intersectionality

Understand systemic barriers of underrepresented populations

Try to gather data that allows you to paint holistic picture of student (financial, academic, engagement)

Acknowledge your bias!

Be mindful of language used to describe populations

Use empathy with disenfranchised populations

Social Locations Must Be Considered.

New scholarship has begun to question the homogenizing of Students in educational research (Harper et al. 2007; Cuyjet, 2006; Fries-Britt, 1998). Social locations such as gender, race, social class, age, ability, religion, sexual orientation, and geographic location affect students differently.
Step 3: Contact Campaign Students

Defining an Effective Outreach Strategy

Now that you have the students, the next step is to determine how you will reach out to them to meet your objectives.

1. Create a timeline
   How frequently and through which channels will you reach out to targeted students?

2. Plan follow-up steps
   Map out steps you will take to follow-up with these students if they do not respond

3. Write your outreach
   Prepare the messages you want to communicate and resources you want to provide at each interaction

4. Share and collaborate
   Consider sharing your strategies with others on campus—no need to reinvent the wheel!
Outreach Strategy

Suggested Outreach Frequency

In successful previous campaigns, advisors outreached to students 3 to 5 times over a one or two month period of the semester.

Example Timeline

Week
1  Targeted Email #1
2  Targeted Email #2
3  Phone Call
   Advising Sessions
6  Follow Up Email
Resource: Student Communications

Audit and Improve Email Content to Ensure Students Respond

What’s inside?
• Summary of email best practices
• Communications audit worksheet
• Email templates for inspiration

Download by clicking here or requesting from your Consultant

You can also access on-demand webinars about our student communications research
What Students See

SEND A MESSAGE TO DAVID JOHNSON

To: David Johnson

Message:
David, Don't forget! UMD transfer admission specialists will be at the advising center from 1-2 today.

You have 56 characters remaining of 160 characters.

Cancel  Send Message
Step 4: Intervene and Direct Students

Connecting Students With The Right Resources

After the initial outreach and appointment, it’s up to you to guide the student down the best path. Make sure you document this for your campaign tracking!

1. **Diagnose**
   What issues is this student facing? The answer might be “none,” and that’s OK.

2. **Act**
   It’s now time for students to take the next step based on your interactions.

3. **Direct**
   After diagnosis, direct that student towards the appropriate action.

4. **Document**
   Relevant information should be documented for reference.
Step 5: Track Outcomes and Follow Up as Needed

Quantifying The Success Of Your Efforts

After intervention, follow up with students to confirm whether they took action, and what the outcome was.

1. Close the Loop
   Seek to reestablish contact with the student within two weeks of your meeting.

2. Record Your Results
   Document results either in a note or spreadsheet on an ongoing basis.

3. Analyze
   Based on the metrics you set, did you achieve your goal? If not, how close were you? What will you change next time?

4. Share
   Share positive results and lessons learned with other advisors in your office, the dean of your department, etc.
# In Summary: How It Works

## Process for Running a Targeted Appointment Campaign with Navigate

<table>
<thead>
<tr>
<th>Focus</th>
<th>Identify</th>
<th>Contact</th>
<th>Intervene</th>
<th>Follow Up</th>
<th>Evaluate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus in on one of your institution’s areas of greatest opportunity</td>
<td>Create lists of students with target attributes to define your target population</td>
<td>Send proactive outreach to students to establish contact</td>
<td>Meet with students and provide tailored advising support to this population’s needs</td>
<td>Follow up on student progress and track campaign process metrics</td>
<td>Determine the outcomes of your campaign and decide whether to iterate and scale</td>
</tr>
</tbody>
</table>

**Platform Tools:**
- Institution Reports
- EAB Research
- Pre-Semester Attrition (mobile adoption as predictor)
- CSV Exportation
- Campaign Resources
- Mobile appointment scheduling
- Notes
- Reports
- Activity Analytics
- Student Profiles
- Risk Analysis & Major Explorer
- Intervention Effectiveness

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Platform Demo
Intervention Effectiveness Analytics

Use EAB’s Newest Intelligence Tool to Gauge Effectiveness

Primary use case...

Intervention Effectiveness allows you to compare the changes in a population or between populations of students within a selected period of time.

Key features include...

- Three different options for analysis, based on student population and time period
- Outputs of key performance, progress, and enrollment metrics
- Narrow population by common student attributes or in-platform interventions
- Drill down lists of students, can download into Excel
- Permission-based
- “Start Here” help text

Important Note - Intervention Effectiveness is only available to members with access to the SSMS Intelligence Pillar.

Want to learn more? Watch our on-demand webinar:
Intervention Effectiveness is a set of tools for evaluating the impact of intentional interventions on student populations.

Learning “what works” at your institution is critical for building effective student success interventions and programs, but it can be challenging in practice. Evaluating the impact of a single intervention (such as an appointment) without context can lead to faulty conclusions. While this dashboard can be used for exploration, it will be most meaningful if you start with a question in mind about interventions you have already conducted.

Our assumption when providing this dashboard is that you are trying to find the results of campaigns and other student success practices that you have implemented. It is not intended to be used for picking and choosing populations and theorizing why their performance may have changed. An example question you might attempt to answer could be “Did my appointment campaign succeed in getting more students to register for the next term?”

For more information about this tool, please review the Release Notes, the Toolkit and/or search “Intervention Effectiveness” in the Help Center for further information.

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**One Population**

Assess the impact of interventions on a single population over a single time period.

**Two Populations, One Time Period**

Assess the impact of interventions on a student population (Population A) compared to a different student population (Population B).

**Two Populations, Two Time Periods**

Compare the performance of one population in a given time period to a second population in a different time period.
Intervention Effectiveness

Select Student Populations by Campaign Appointment Attendance

Time Period

ENROLLED IN START TERM
Fall 2018

ENROLLED IN END TERM
Spring 2019

Population A

Intervention Information

APPT. CAMPAIGN A
Academic Advising for Fall...

CAMPAIGN APPT. STATUS A
Attended

WATCH LIST A
All

Current Student Information

TAG A
All

CATEGORY A
All

Population B

Intervention Information

APPT. CAMPAIGN B
Academic Advising for Fall...

CAMPAIGN APPT. STATUS B
Did Not Attend

WATCH LIST B
All

Current Student Information

TAG B
All

CATEGORY B
All
## Intervention Effectiveness

### Compare Student Outcomes by Campaign Appointment Attendance

<table>
<thead>
<tr>
<th>Enrollment Summary</th>
<th>Start Term</th>
<th>End Term</th>
<th>Percent of the Start Term</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fall 2018</td>
<td>Spring 2019</td>
<td></td>
</tr>
<tr>
<td>A: Enrolled</td>
<td>707</td>
<td>668</td>
<td>94.5%</td>
</tr>
<tr>
<td>B: Enrolled</td>
<td>511</td>
<td>466</td>
<td>91.2%</td>
</tr>
<tr>
<td>A: Graduated</td>
<td>—</td>
<td>3</td>
<td>0.4%</td>
</tr>
<tr>
<td>B: Graduated</td>
<td>—</td>
<td>36</td>
<td>7.0%</td>
</tr>
<tr>
<td>A: Not Enrolled</td>
<td>—</td>
<td>36</td>
<td>5.1%</td>
</tr>
<tr>
<td>B: Not Enrolled</td>
<td>—</td>
<td>9</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

**View Term Persistence of Start Term Population A:**
- Count
- Percentage

**View Term Persistence of Start Term Population B:**
- Count
- Percentage

### Performance Summary

<table>
<thead>
<tr>
<th>Performance Summary</th>
<th>Start Term</th>
<th>End Term</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fall 2018</td>
<td>Spring 2019</td>
<td></td>
</tr>
<tr>
<td>A: Average Cumulative GPA</td>
<td>3.22</td>
<td>3.23</td>
<td>+0.3%</td>
</tr>
<tr>
<td>B: Average Cumulative GPA</td>
<td>3.41</td>
<td>3.43</td>
<td>+0.6%</td>
</tr>
</tbody>
</table>
# Targeted Campaign Tracker Template

Available by Request

<table>
<thead>
<tr>
<th>Client ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Email Address</th>
<th>Phone Number</th>
<th>Email 1</th>
<th>Response</th>
<th>Email 2</th>
<th>Response</th>
<th>Call 1</th>
<th>Notes</th>
<th>Call 2</th>
<th>Notes</th>
<th>Meeting 1</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>00054752</td>
<td>John</td>
<td>Smith</td>
<td><a href="mailto:john.smith@company.com">john.smith@company.com</a></td>
<td>555-123-4567</td>
<td>Set up meeting</td>
<td>Not NoodooNA</td>
<td>Set up meeting</td>
<td>Completed</td>
<td>Left voicemail</td>
<td>Not NoodooNA</td>
<td>Completed</td>
<td>Left voicemail</td>
<td>Not NoodooNA</td>
<td></td>
</tr>
<tr>
<td>00054753</td>
<td>Jane</td>
<td>Johnson</td>
<td><a href="mailto:jane.johnson@company.com">jane.johnson@company.com</a></td>
<td>555-123-4568</td>
<td>Set up meeting</td>
<td>Not NoodooNA</td>
<td>Set up meeting</td>
<td>Completed</td>
<td>Left voicemail</td>
<td>Not NoodooNA</td>
<td>Completed</td>
<td>Left voicemail</td>
<td>Not NoodooNA</td>
<td></td>
</tr>
<tr>
<td>00054754</td>
<td>Mary</td>
<td>Davis</td>
<td><a href="mailto:mary.davis@company.com">mary.davis@company.com</a></td>
<td>555-123-4569</td>
<td>Set up meeting</td>
<td>Not NoodooNA</td>
<td>Set up meeting</td>
<td>Completed</td>
<td>Left voicemail</td>
<td>Not NoodooNA</td>
<td>Completed</td>
<td>Left voicemail</td>
<td>Not NoodooNA</td>
<td></td>
</tr>
<tr>
<td>00054755</td>
<td>David</td>
<td>Williams</td>
<td><a href="mailto:david.williams@company.com">david.williams@company.com</a></td>
<td>555-123-4570</td>
<td>Set up meeting</td>
<td>Not NoodooNA</td>
<td>Set up meeting</td>
<td>Completed</td>
<td>Left voicemail</td>
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<td>Completed</td>
<td>Left voicemail</td>
<td>Not NoodooNA</td>
<td></td>
</tr>
</tbody>
</table>

**Scheduled tutoring?**

- Yes
- No

**Risk Before Campaign (Fall 2014)**

- High
- Low

**Total:** 27

- 54%
# Campaign Export

## Easily Learn Which Students Scheduled and Completed Appointments

### Export Campaign Data to Evaluate Campaign Progress

While conducting any form of intervention, we recommend checking in during the course of the intervention to ensure that it is proceeding as expected.

Check “process metrics” (e.g., appointments attended, reports filed) to see if students are not attending scheduled appointments. If your campaign is off-track, it’s important to follow up before the campaign ends.

### Appointment Campaigns » Test

<table>
<thead>
<tr>
<th>INDEX</th>
<th>APPT DATE</th>
<th>APPT TIME</th>
<th>STUDENT</th>
<th>STUDENT ATTENDED?</th>
<th>AT-RISK?</th>
<th>APPT CREATED ON</th>
<th>View Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>04/12/2018</td>
<td>11:30a-12:00p</td>
<td>Aarons, Delphina</td>
<td>Yes</td>
<td>No</td>
<td>04/12/2018</td>
<td>View Details</td>
</tr>
<tr>
<td>2</td>
<td>04/12/2018</td>
<td>1:30p-2:00p</td>
<td>Abbott, Cleaunt</td>
<td>Yes</td>
<td>No</td>
<td>04/11/2018</td>
<td>View Details</td>
</tr>
</tbody>
</table>
Using Campaign Export Data for Analysis

When conducting your analysis, you can use the information in the Campaign Export* to help you compare outcomes for students with appointments to outcomes for students who did not schedule or complete appointments.

*This step is not necessary if you have access to the Intervention Effectiveness tool at your institution.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>First Name</td>
<td>Last Name</td>
<td>ID</td>
<td>Email</td>
<td>Major</td>
<td>Risk</td>
<td>Cumulative GPA</td>
<td>Credits Earned</td>
<td>Number of Appointments Made</td>
<td>Number of Appointments Attended</td>
</tr>
<tr>
<td>2</td>
<td>Delphina</td>
<td>Aarons</td>
<td>75270435</td>
<td>dgsjbx7@kiottetzz</td>
<td>Pre-Psychol</td>
<td>Moderate</td>
<td>1.7</td>
<td>84</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>Joachim</td>
<td>Abbasi</td>
<td>747525050</td>
<td><a href="mailto:pilbt1@illmsnx.uc">pilbt1@illmsnx.uc</a></td>
<td>CRJU</td>
<td>High</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>Balint</td>
<td>Abbassi</td>
<td>800264142</td>
<td>uwusbjkz3@rbtkyz</td>
<td>GENL</td>
<td>High</td>
<td>1.67</td>
<td>20</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>Dick</td>
<td>Abbassi</td>
<td>112489564</td>
<td>swebtfjqt9@qxor</td>
<td>BADM</td>
<td>High</td>
<td>0.5</td>
<td>4</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>Kahlilia</td>
<td>Abbatillo</td>
<td>986718140</td>
<td>ictpozbasx8@ldxlr</td>
<td>EDPK</td>
<td>High</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>7</td>
<td>Augusta</td>
<td>Abbington</td>
<td>600813864</td>
<td>crxhlqu8@ydphikyq</td>
<td>Pre-Marke</td>
<td>Moderate</td>
<td>0</td>
<td>53</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>8</td>
<td>Talulah</td>
<td>Abbington</td>
<td>852846364</td>
<td>rxcbp81@gfmgw</td>
<td>Pre-Nursin</td>
<td>Moderate</td>
<td>0</td>
<td>52</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9</td>
<td>Cleavant</td>
<td>Abbott</td>
<td>217119221</td>
<td>tzkmyux22@wssrv</td>
<td>PSYC</td>
<td>High</td>
<td>0.68</td>
<td>4</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>10</td>
<td>Herve</td>
<td>Abboud</td>
<td>100610678</td>
<td>znccqfeem4@dlicity</td>
<td>PSYC</td>
<td>High</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
1. What Is a Targeted Campaign?

2. How It Works: Five Steps

3. Successful Campaigns from Around the Collaborative

4. Available Resources
### Wide Range of Campaigns Across One School

#### Contributing to Overall Improvement in Graduation

<table>
<thead>
<tr>
<th>Campaign Type</th>
<th>Population &amp; Intervention</th>
<th>Student Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> Academic Performance Improvement</td>
<td>Connect <strong>Business School students on probation</strong> to needed support resources</td>
<td><strong>34%</strong> Percentage of students who raised GPA above 2.0</td>
</tr>
<tr>
<td><strong>2</strong> Major Selection</td>
<td>Assist <strong>high-risk Undeclared students</strong> with major planning and declaration</td>
<td><strong>19</strong> Additional students enrolled in Education and Career Planning course</td>
</tr>
<tr>
<td><strong>3</strong> Transfer Persistence</td>
<td>Facilitate academic planning for <strong>low-GPA transfer Biology students</strong></td>
<td><strong>8%</strong> Eight percentage points higher persistence than previous year cohort</td>
</tr>
<tr>
<td><strong>4</strong> Accelerating Degree Completion</td>
<td>Assist <strong>underperforming psychology students</strong> with course sequencing</td>
<td><strong>25</strong> Upper-class students enrolled in gatekeeper statistics course</td>
</tr>
<tr>
<td><strong>5</strong> Graduation Application</td>
<td>Remind <strong>qualified seniors</strong> to apply for graduation</td>
<td><strong>19%</strong> Increase in graduation candidates compared to spring 2014</td>
</tr>
</tbody>
</table>
Scholarship Compliance Campaign Leads to $4M in Tuition Revenue

Half of Albany students are eligible for the statewide Tuition and Scholarship Program, which requires students to be in grade and enrollment compliance to receive tuition money.

How EAB Helps Keep Students in Compliance

1. Use EAB to identify Grant recipients and their compliance status, focusing on two key variables: applicable credits and major declaration.

2. Advising staff identify why students aren’t compliant with Grant requirements.

3. Advisors create an individual action plan in the EAB platform to get students reenrolled and ensure they become or remain Grant compliant.

4. Major departments receive and implement a plan to ensure all students come into compliance.

862
Previously noncompliant Grant students reenrolled through the campaign

$4M+
Additional tuition dollars from reenrolled students
1. What Is a Targeted Campaign?

2. How It Works: Five Steps

3. Successful Campaigns from Around the Collaborative

4. Available Resources
Two-Year Members

Community College Advising Campaign Ideas

A targeted advising campaign is an effort of focused, proactive outreach to a population of students in need of specific intervention or action. Navigate makes it easy to conduct a wide range of campaigns. Below is a list of 65 campaign ideas that advisors across the country have used to effectively reach various student populations. Use these ideas as inspiration to connect with your students!

Before Term

1. Students with a declared major that does not match the one "majored in" for at least 2 years.
2. Students who may benefit from virtual advising.
3. Students who have stopped out and are not yet enrolled for the following term.
4. Returning students who have not registered four weeks prior to the start of classes.
5. Students who could maximize financial aid by taking a few additional credits.
6. Students who have not registered for classes identified on their academic plan for the upcoming semester.
7. Students who are registered for classes that do not count toward their major or curriculum.
8. High performing students who are taking fewer than 15 credits per semester.
9. Underrepresented students with a small amount on their account who could benefit from a micro-grant.
10. "Stop-tacks" with fewer than 12 credits remaining to obtain a credential.
11. Returning students who are an academic probation and who have not yet attended an advising session.

Start of Term

20. First-generation students who may benefit from a range of campus resources and opportunities.
21. Returning students with a GPA close to the threshold for Dean's List.
22. Students enrolled in a course with a high tutor rate and who may benefit from tutoring.
23. Students who have identified that they are working more than 20 hours per week.
24. Students with excessive credits who may be at risk of exhausting available options who have earned a credential.
25. Students who intend to transfer who have a GPA below 3.0.
26. Students who have been flagged by early alerts in the previous semester.
27. Undergraduate students about a certain credit threshold.
28. Students who have not created a term-by-term academic plan.
29. First-term students who need assistance with the procedures described in the senior level student guide.
30. First-term students in need of a persuasive nudge to engage with their professors.
31. First-term students with an intent to transfer who would benefit from a transfer planning workshop.
32. Students with more than 50 credits and a GPA below minimum graduation threshold.
33. Students interested in a selective program of study that has an academic advisor on-staff.

Let's Get Started!

1. Select a targeted campaign to run.
2. Choose a group of students you want to target for intervention.

Four-Year Members

Campaign Ideas

Target Your Advising Efforts Across the Year

A targeted advising campaign is an effort of focused, proactive outreach to a population of students in need of specific intervention or action. Over the past year, academic advisors in the Student Success Collaborative have used the Navigate platform to conduct a wide range of campaigns—seeing impressive results with students. Below is a list of 61 campaign ideas from advisors across the country.

Start of Term

1. Ensuring freshmen students who are high risk based on their pre-enrollment data.
2. Students struggling in a specific course required for their major identified through early alert.
3. Students with GPAs below 3.5.
4. Undergraduate students on probation who have not attended a major exploration or advising session.
5. Undeclared students and majors on academic probation from the previous term.
6. Engineering students in the "Mukey Middle" for their concentration (e.g., CEE 2.5 to 3.0).
7. Pre-nursing students in the "Nursery Middle" for admission into the program (e.g., CEE 3.0 to 3.4).
8. Freshmen students who have missed the grade threshold for one or more Success Match courses.
9. Students within 0.5 points of the GPA requirement for their program.
10. Students participating in the School of Business who are close to academic probation.
11. Undeclared students who are unenrolled in the course that is required for their major.
12. Students who are on track to declare an intended major but have not registered.
13. Students who are at risk for not meeting excessive admittance requirements.
14. Pre-admission students who are not yet meeting the admissions requirements.
15. Students who are not meeting the minimum GPA for their major in the upcoming term.
16. Students who have not registered for a course required by their major.
17. High performing biology students who have not applied for labs.

Registration

18. Students who have not created or submitted a degree plan.
19. Students who have not completed the advising module.
20. Undeclared junior transfer students.
21. Undeclared students who are meeting the credit threshold required by the university to declare a major.
22. Students in need of an advisor or transferring to another institution.
23. Students not on track to complete required courses in time to graduate.
24. Students who are not meeting minimum GPA thresholds.
25. Students who are not enrolled in the program.
26. Students with excessive credits.
27. Students close to graduating who may need additional assistance.

Let's Get Started!

Fill out few targeted campaigns to try this year. For a step-by-step guide to try first, and additional resources to conduct your campaigns.
Toolkit Resources

Available on This Webinar’s EAB.com Landing Page

Designing and Implementing a Targeted Advising Campaign Toolkit

Measuring Campaign Effectiveness Toolkit

More Helpful Toolkits

Quantifying the Impact of Your Student Success Initiatives Toolkit

Toolkit available by request from your Strategic Leader

Intervention Effectiveness Toolkit

Additional Resources for Campaigns

**Campaign Tracker Template**
Available by request

**Campaign Calendar Template**
Available by request
Help Center and Community Updates

Focusing on Improved Support, Resources, and Collaboration

The Navigate Help Center was been relaunched with a new organizational design and updated content, including:

- **Platform Information** – Information on specific features and common platform workflows across all three pillars of Navigate: Strategic Care, Smart Guidance and Intelligence.

- **Product Updates** – Release notes for all three pillars from the previous six months and important cross-platform announcements.

- **Site Administration** – Decision guidance, EAB recommendations and configuration information for all pillars of Navigate.

- **Resources** – EAB Infographics, toolkits, training materials, student promotional materials and other resources to support your use of Navigate on campus.

- **The Community** – New topics to facilitate engaging conversation, make connections, share best practices, and answer questions.
The ROI of Student Success

Tues February 12, 2pm ET

The next decade will bring unprecedented competition for shrinking pools of prospective students, threatening budgets across higher education. During this session, originally presented at CONNECTED18, we will draw on insights from progressive colleges to share a primer on everything you need to know to weather the storm.

Improving Adult Learner Engagement by Focusing on Career Alignment

Thurs, March 14, 2pm ET

Adult learners see college as an opportunity to build skills to seek better jobs to support their families, but often find college campuses ill-suited to support their goals. Join this session to learn how prioritizing adult learners' career focus can improve engagement and outcomes.
Please Fill Out the Exit Survey!

• As you exit the webinar, you will be directed to an evaluation that will automatically load in your web browser.

• Please take a minute to provide your thoughts on the presentation.

THANK YOU!

Please note that the survey does not apply to webconferences viewed on demand.