Implementing advising reforms leveraging technology: Lessons from three iPASS institutions
Agenda

• Study Background
• Overview of Interventions at three institutions
• Colleges’ Implementation experiences
• Q&A
Research Partners
College Partners
Background
Technology-Mediated Advising can leverage holistic student support and practices.

- **Degree Planning**
- **Coaching & Advising**
- **Early Alerts & Risk Targeting**

- Education
- Career
- Finance

Visit Tutor
Multiple Absences
Attend Office Hours
Submit Schedule
Financial Aid Issue
Holistic student support is structured and delivered according to a SSIPP model.

**Sustained**
Support is ongoing, rather than using an “inoculation” approach.

**Strategic**
Services are differentiated to maximize capacity.

**Integrated**
Services are not viewed as stand-alone interventions.

**Proactive**
Services are an integral part of all students’ experiences.

**Personalized**
Students receive the support they need when they need it, from an individual who knows them well.
Technology can enable holistic student support
Research Objectives

• Impact analysis
  – Assess impact of mandatory holistic, integrated and sustained student support strategies that leverage iPASS technologies on student outcomes

• Knowledge development
  – Examine how colleges design and communicate iPASS interventions for consistent advisor adoption
  – Provide information to the field about the challenges and potential solutions to improve iPASS implementation
# Study Design and Treatment Contrast

**Randomized Controlled Trial (RCT)**

<table>
<thead>
<tr>
<th>Treatment (Intervention)</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Proactive engagement with iPASS tools and iPASS advising toolkit over 2 semesters</td>
<td>- Access to iPASS tools and legacy advising interactions</td>
</tr>
<tr>
<td>- Sustained, Strategic, Intrusive and integrated, and Personalized (SSIP) advising procedures and interactions</td>
<td></td>
</tr>
</tbody>
</table>
Who is in the Study?

Target Population
- “At-risk”
- Continuing students

Total Sample: 8000

<table>
<thead>
<tr>
<th>College</th>
<th>Cohort 1</th>
<th>Cohort 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresno</td>
<td>602 (302 in the program)</td>
<td>617 (308 in the program)</td>
</tr>
<tr>
<td>MC3</td>
<td>2,082 (805 in the program)</td>
<td>948 (463 in the program)</td>
</tr>
<tr>
<td>UNCC</td>
<td>2,580 (1,290 in the program)</td>
<td>1,248 (623 in the program)</td>
</tr>
<tr>
<td>Sample (total = 8077)</td>
<td>5264 (2397 in the program)</td>
<td>2813 (1394 in the program)</td>
</tr>
</tbody>
</table>
Overview of Interventions at Three Colleges
Key Components of a Technology-Mediated Advising Intervention

- **Data-Driven Outreach**
  - (early alerts, self-analysis surveys)

- **Advising Session**
  - (mandatory)
# University of North Carolina at Charlotte

<table>
<thead>
<tr>
<th>Intervention Component</th>
<th>Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Data – Driven Outreach</strong></td>
<td>• Notification of enrollment in “critical progression courses” (EAB)</td>
</tr>
<tr>
<td></td>
<td>• Early alert survey email/phone call follow-ups</td>
</tr>
<tr>
<td></td>
<td>• Email follow-up to midterm grades (in “critical progression courses”)</td>
</tr>
<tr>
<td><strong>Mandatory Advising Session</strong></td>
<td>• Students who receive a D/F/W on a midterm in a critical progression course required to meet with advisor</td>
</tr>
<tr>
<td></td>
<td>• Advising interactions are guided by toolbox</td>
</tr>
<tr>
<td></td>
<td>• Advisors record notes after each session</td>
</tr>
</tbody>
</table>
Week 2 Communication at UNCC

Hi {{FIRST_NAME}},

Now that add/drop is over I wanted to let you know about your critical progression courses for the semester. Doing well in all of your classes is important, but as the name suggests, success in these classes is critical for progression in your intended major.

Here’s a list of your classes, showing which ones are CPCs. It also shows the courses for which success services like tutoring and Supplemental Instruction are available. Take advantage of these- students like you have used them to graduate on time with better grades.

<table>
<thead>
<tr>
<th>Course</th>
<th>Critical Progression Course?</th>
<th>Tutoring Available?</th>
</tr>
</thead>
<tbody>
<tr>
<td>{{Course_1}}</td>
<td>{{CPC_1}}</td>
<td>{{TR_1}}</td>
</tr>
<tr>
<td>{{Course_2}}</td>
<td>{{CPC_2}}</td>
<td>{{TR_2}}</td>
</tr>
<tr>
<td>{{Course_3}}</td>
<td>{{CPC_3}}</td>
<td>{{TR_3}}</td>
</tr>
</tbody>
</table>

I would particularly recommend the resources below for new transfer students.
* The University Center for Academic Excellence offers a range of workshops that can help you succeed.
* Check out this video resource and the UCAE webpage.
* Go to my.uncc.edu and navigate to CONNECT to make an appointment with me.
* Here is a link to DegreeWorks and here is a link to the Transfer Center.

{{ADV_PRIMARY}}
## California State University at Fresno

<table>
<thead>
<tr>
<th>Intervention Component</th>
<th>Implementation</th>
</tr>
</thead>
</table>
| **Data – Driven Outreach** | • GradesFirst identifies students who need support through early alerts  
  • Faculty submit early alert surveys three times  
  • Peer mentors check in with students regarding early alert data and academic progress |
| **Mandatory Advising Session** | • All students attend an hour-long advising meeting to discuss My Degree Plan (completed before appointment)  
  • Advising interactions are guided by toolbox. Advisors complete note template after each session |
## GradesFirst Template at Fresno State

<table>
<thead>
<tr>
<th>Discussion of last semester:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Courses passed/failed?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Discussion of current semester:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Most challenging course/Early alert:</td>
<td></td>
</tr>
<tr>
<td>Solutions provided:</td>
<td></td>
</tr>
<tr>
<td>Most enjoyable course(s):</td>
<td></td>
</tr>
</tbody>
</table>

| My Degree Plan review/update:   |  |
|                                 |  |

| Short term goal(s) to accomplish this semester: |  |
|                                                |  |

| Long term goal(s):                      |  |
|                                       |  |

| Plan for Spring 2018/Student to-dos:    |  |
|                                       |  |

| Additional information:                |  |
|                                       |  |

| Note any changes since last semester:  |  |
# Montgomery County Community College

<table>
<thead>
<tr>
<th>Intervention Component</th>
<th>Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data – Driven Outreach</td>
<td>• Early alert survey email/phone call follow-ups</td>
</tr>
<tr>
<td></td>
<td>• Blackboard surveys to students to check in</td>
</tr>
<tr>
<td></td>
<td>• Automated Blackboard informational messages to notify and encourage student use of campus resources</td>
</tr>
<tr>
<td>Mandatory Advising Session</td>
<td>• Mandatory advising for students with D/F/W in previous semester</td>
</tr>
<tr>
<td></td>
<td>• Students encouraged to complete My Career Plan prior to advising appointment</td>
</tr>
<tr>
<td></td>
<td>• Advising interactions are guided by toolbox</td>
</tr>
<tr>
<td></td>
<td>• Advisors use SpeedNotes and referrals to identify Core Performance Issues</td>
</tr>
</tbody>
</table>
My Career Plan at MontCo
University of North Carolina at Charlotte
<table>
<thead>
<tr>
<th>Advisors Staffed</th>
<th>Advising</th>
<th>Advising</th>
<th>Informatics Advising</th>
<th>Variations in Policies, Initiatives, Advising Practices and Unit Support (Ex: Use of Early Alerts)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Advisors</td>
<td>16</td>
<td>7</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>(4 in Center and 3 Sole Advisor for Major/Dept)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caseloads</td>
<td>100-250 Per Caseload</td>
<td>250-350 Per Center Caseload and 400-500 BIOL; 900-1000 PSYC; 1000-1200 POLS/SOCY</td>
<td>500-600 Per Caseload</td>
<td>250-350 Per Case Load</td>
</tr>
<tr>
<td>Advising Holds</td>
<td>Mandatory Advising All Students</td>
<td>Mandatory Advising All Students</td>
<td>Mandatory Advising Certain Students</td>
<td>Mandatory Advising All Students</td>
</tr>
<tr>
<td>Major Assignments</td>
<td>No-Declared Designated Majors</td>
<td>Designated Majors</td>
<td>Designated Majors</td>
<td>Designated Majors</td>
</tr>
<tr>
<td>Advisor Duration</td>
<td>Advise Until Declared</td>
<td>Advise Until Declared</td>
<td>Advise All 4 Years</td>
<td>Advise Until Declared</td>
</tr>
<tr>
<td>Predictive Courses for Graduation in Major</td>
<td>All Majors Critical Progression Courses Applied (Confusing)</td>
<td>CLAS Critical Progression Courses Applied (Disputed)</td>
<td>BUSN Critical Progression Courses Applied</td>
<td>CCI Critical Progression Courses Applied</td>
</tr>
<tr>
<td>UCOL students undeclared so seem confusing to have CPC as undeclared. CLAS degreed with some CPC Metrics in Humanity Courses.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Lessons Learned - Incorporate Advisor Feedback Throughout the Process to Standardized Metrics

- Have Frontline Advisors Process Map (Dept. Process and Session Workflow)
  – Separate from Directors/Administrators
- Have Frontline Advisors Identify What they Like and Dislike About their Process and Why (Ex: Dislike not having control over messaging)
- Articulate and Document what they want to change and why
- Discuss and agree upon a common philosophy/mission/vision among units
- Advisors need to be educated on any philosophical shifts (Ex: W is still not a good outcome even if it is the best outcome)
- Discuss and agree upon a common initiative/outreach/process for student outcomes
- Always remind everyone of the purpose and mission when making and implementing initiatives
UNC-Charlotte iPASS Advising Process Map

**PREP (outreach or advising session)**

- **Student Data**
  - Transfer grades
  - Previous grades in CPC's
  - Withdraw information
  - GPA trend last two semesters
  - Earned/at tempted hours ratio
  - EA/MTG alert data (CONNECT)
  - Response data/tags

- **Advisor Knowledge**
  - Personal knowledge and experience

- **Student Questions**
  - Have student complete the Student Confidence Survey.

**SESSION**

- Advisor/Student Conversation
  - What went well? What’s going well?
  - What didn’t go well? What’s not going well?
  - How do you plan to improve this semester? Are you on track for Graduation?

- Advisors ask Probing Questions based on student responses to Guiding Questions/Confidence Survey.

- **Current Academic Experience**
  - Favorite and least favorite courses
  - Semester-to-semester comparisons
  - Academic challenges (D, F, W)

- **Time Management**
  - Structure of the day/week
  - Hours spent per week studying

- **Education Plans**
  - Study abroad/internships
  - Discuss goals and how they will be (are being) reached

- **Long Term Academic and Career Goals**
  - First steps in achieving goal(s)
  - Describe goals and plan to achieve them (long-term)

**POST SESSION**

- **Students**
  - Action plan/next steps
  - Registration
  - Begin/continue degree planning
  - Referrals

- **Advisors**
  - Notes
  - Note reasons (iPASS)
  - Progress towards outcomes

**SHORT-TERM OUTCOMES**

- **Students will**
  - Develop an academic plan (1-2 semesters)
  - Develop a career plan
  - Take advantage of student services and support
  - Sharpen student success skills (i.e. time management)
  - Develop positive relationship with advisor
  - Maintain (return to) good academic standing

**LONG-TERM OUTCOMES**

- **Students will**
  - Think critically about their experiences
  - Develop reflective habits of mind
  - Develop a sense of agency over academic and career plans
  - Develop a sense of professional identity
  - Graduate

**Provide students with laminated copy of questions as needed.**
California State University at Fresno
Implementation Successes

• Collaboration & Team Building across decentralized advising centers
  – Trainings, webinars, monthly meeting check ins
  – Tracking Major changes

• Creation of Advising Toolbox with note template
  – Uniformity to advisor reports
  – Guiding questions to utilize during appointments
Implementation Challenges

• Training and communication across campus
  – OIE, College Advising Centers, Financial Aid, Learning Center, Department Chairs, etc.
  – My Degree Plan Rollout delayed
  – iPASS website created, FAQ’s

• Peer Mentor Role
  – Administrative to peer mentor
  – Training and development of peers
Montgomery County Community College
Implementation Success #1: Early Alert Survey

• Rationale
  – Midterm progress is contractually required
  – “too late!”

• Quantitative success
  – Spring 2017: 74% completed
    • 591 kudos
    • 402 early alerts
  – Fall 2017: 66% completed
    • 580 kudos
    • 391 early alerts
  – Spring 2018: TBD

• Qualitative success
Implementation Success #2: Referrals

- **Rationale**
  - Connection to support services on campus
  - Proactive support connection

- **Quantitative success**
  - 49 referrals

- **Qualitative success**
Implementation Challenges

- Identification of at-risk students
  - Semester 1 of each cohort identified through predictive analytics tool
    - Question of availability of data?
  - Semester 2 of each cohort required appointment based upon “triage” criteria
    - Originally tried to “catch more”
      - received a D, F, or W in the spring 2017 semester and/or
      - had a spring 2017 term GPA of 3.0 or lower and/or
      - has a cumulative GPA of 3.0 or lower
    - Realized that we needed to be more selective
      - only those who received a D, F, or W in the fall 2017 semester

---

60% 40%

16% 84%
Implementation Challenge: Identity Crisis

- A LOT has happened in the space of advising at MCCC since 2012
  - New tools
  - New processes
  - New roles
- How do we juggle all these?
- Who are we?
Questions?
For more information

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