Our E-Advising Initiative in Motion...
Where did we start?
Q2S!
IAPs!
What did we say we would do?
Proactive Advising
Degree Planning
Timely Decisions
Accurate and Integrated Tools for Advisors and Students
Improving processes and automation to support timely:

- Admission
- Transfer Credit
- Financial Aid
- Scholarship Selection
- Advisor approved changes (substitutions, waivers, change of major, etc.)
- Graduation Application and Checks
Getting there...

Improving tools to support:

- Proactive Advising
- Communication between advisors and students
- Identification of students not on-track in their major
- Exploration of majors
- Multi-year Degree Course Planning
Degree Completion

Aligning our community, processes and technology in support of student success.
What have we done?
Admission and Financial Aid

Goals:

- Fall 2017 Freshmen and Transfer applicants will have an admission decision and Financial Aid offer by April 1 if they apply for financial aid by the March 2 priority deadline. **Met**

- Continuing students who apply by the March 2 deadline who have reasonable financial need will be allowed to register for Fall 2017 in April without paying any fees. **Met**
Registration and Graduation

- Graduation Filing Re-engineering: **Done**
- Advisor Request System: **Live**
- Validation Appointments: **Live**
- Redesigned Academic Structure: **Done**
Enhancing our Transfer Credit Rules:

- Undergraduate Studies targeting feeder community colleges and high transfer areas for articulation. They are streamlining the recommendation/approval process.

- The Registrar Office is building General Education and General elective rules for our feeder community colleges based on Assist.

- Goal: To build as many rules as possible by mid-March. About 70% of transcripts come from 15 schools! Met
What else is underway or planned?
Goals:

- New Fall 2017 Transfer students will have an initial transfer credit evaluation including courses through Fall 2016 before their orientation/advising session.

- New and continuing students will have all transfer credit evaluations up to date prior to each registration/advising session.

- Transfer Credit should be applied to satisfy as many degree audit requirements as possible.
Other Pieces of our Strategy

- Financial Aid Advising and Coordination
  - Improve our in-person services.
  - Coordinate our advising and intervention strategies with the campus advising community.
  - Work on ‘proactive’ approaches for students especially the link between aid maximum time frames and degree planning.
  - Support the special needs of our Dreamers.
Other Pieces of our Strategy

- Improving Communications
  - Targeted, timely, individualized communications
  - Student Success Focus: removing deficit language
  - Communication Center for Students and Advisors
  - EAB Campus for advisor communications Ready

- Improving Access to Information
  - GET Access Project
  - Access Request Streamline Done
  - New EAB Institutional Reports Ready
  - Tableau Project
Other Pieces of our Strategy

- Repeat Checking – automatically remove duplicate credit and grant grade forgiveness up to the allowable limits.
- Student and Advisor Center improvements
  - Communication Center
  - Student – Enable Transfer Credit Report
  - Implement Preferred First Name
  - Import Student Photo
- Utilize Mass Degree Audits – student nudges, identification and reporting, automate degree clearing
- Post Enrollment Requisite Checking
Cal State LA is has been approved to be part of the September membership cohort!

- Targeted mid-Spring 2017 go-live for:
  - Advising appointment and workshop management
  - Proactive campaigns and at-risk tracking
  - Communications
  - Reports for Advising Centers

- Will explore implementation options (pilots vs more limited scope)
The Cal State LA has begun!

- **February 2017**: Program kick-off
  - Identification of pilot majors and creation of road maps
- **October 2017**: Go-live of pilot majors for Spring 2018 advising and registration!
- **March 2018**: Additional majors go-live
- **October 2018**: Goal: All majors live!
- **March 2019**: Goal: All minors live!
Degree Planner – Key Features

- Recommendations based on ideal timely progression

- Plan is based on the student’s current progress and updates based on registration, course completions, transfer credit, and substitutions. Adds extra requirements when needed such as developmental math or writing pathway.

- Plan is customizable by the student and advisor including unit load, shopping–style course selection and drag–and–drop re–arrange courses.

- Plan is integrated with degree audit and registration.

- What–if capability for change of major, add a major/minor.
The Future!
Questions?
Focusing on EAB
(Educational Advisory Board)
Student Success
Collaborative
The Journey and Thanks!

- **Initial presentations and survey:** April 2016
- **Project Launch:** June 2016
  - Leadership team, Project management and Technical teams formed
- **Campus Kickoff:** September 2016
  - Directors of Advising and Student Success ongoing engagement
- **Specialist Track Launch:** January 2017
  - Site builders and validators
  - Specialists
- **Success Marker Identification and Institutional Reports:** February 2017
  - Success Marker Workshop Attendees
- **Faculty Focus Group:** March 2017
  - Faculty Focus Group Members
Our EAB Student Success Collaborative platform go-live is just the next step in the journey...

Let’s remember the ‘fuller’ picture

Jargon alert: EAB, EAB SSC, and EAB Campus are the same thing!
Student Success Collaborative
Leveraging Technology, Research, and Consulting to Drive Meaningful Student Success Improvements

At EAB, we imagine an intelligent campus, deeply but invisibly wired with analytics that empower students and those who care for them with the information and tools to make smarter, more rewarding decisions along the path to realizing their full potential while having the best possible education experience.

Product innovation based in research, driven by members

Proven best practices to help leaders drive change management

Strategic, customized approach to implementations and support
Using Data and Analytics to Spot Students Before Its Too Late

Start With Risk Stratification Powered by Central Student Records

Case in Point: Early Course Grades Can Pinpoint Who is Heading for Trouble
Graduation Rate in Biology Major by Course Grade

<table>
<thead>
<tr>
<th>Course</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D/F</th>
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<tbody>
<tr>
<td>Precalculus</td>
<td>64%</td>
<td>52%</td>
<td>28%</td>
<td>21%</td>
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<tr>
<td>Calculus</td>
<td>83%</td>
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<td>67%</td>
<td>25%</td>
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<tr>
<td>Introduction to Chemistry</td>
<td>85%</td>
<td>78%</td>
<td>69%</td>
<td>24%</td>
</tr>
<tr>
<td>Introduction to Biology</td>
<td>63%</td>
<td>40%</td>
<td>23%</td>
<td>22%</td>
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High Risk Cases
Most do not return for a second year

FIRST YEAR GPA 2.0

Murky Middle
Outcome difficult to predict without advanced data
84% Return for a second year
48% Graduate within six years (SSC national data)
70% of Murky Middle attrition occurs in the second year or later

Low Risk Cases
Vast majority will ultimately graduate

FIRST YEAR GPA 3.0

Other Academic Factors Predictive of Risk
Course Timing
Credit Progress
GPA Trends

1) Large Public University (69% Overall Graduation Rate)
Scaling Interventions via the “Coordinated Care Network”

A Connected and Informed Student Support Infrastructure

The Coordinated Care Network

1. Risk analytics classify high, med, and low risk students
   - High-touch care
   - Proactive Intervention
   - Self-referral

2. Front-line staff collaborate on cases with support offices
   - Front-line Staff
     - Advisors
     - Faculty
     - Specialists
   - Case Referrals
   - Shared Notes

3. Leadership continuously improves the system
   - Utilization reports
   - Effectiveness Feedback Loop

For Most Schools, Care Is Anything But Coordinated

Advisor makes referral
- Points out office on campus map
- Asks student to set appointment

Did the student ever connect?
- Student never reports back

Did the issue get resolved?
- Interaction not recorded
- Effectiveness never analyzed

Can we do better?

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Simplified Student Success Workflow / Ecosystem For Cal State L.A.

- **Risk Analytics**: Predictive modeling and historical insights
- **Student Success CRM**: Quick access to critical student information
- **Communications**: Email and text, plus tracking and records
- **Early Warning**: Instructor-submitted performance alerts
- **Advising Notes**: Single record of every support interaction
- **Appointments**: Interactive scheduling accessible by students

*Coordinating efforts between all users on a single platform*
What is included in our launch?

How will we get started?
Cal State LA’s **Phase I Implementation**

Features and Users involved in Spring 2017 Go-Live

### Groups Moving Forward

**Users**
- Center-based Academic Advisors
  - All College advising centers
  - University Undergraduate Advising Center
  - EOP
  - International Programs
- Faculty Advisors
- Chairs and Deans
- Students

### Key Platform Functionality

**Advisors**
- Student Profile Page
- Advising notes/summary reports
- Email communication with students
- Watch lists and saved lists of students
- Success Markers
- Advanced Search

**Appointment Management** *(Centers Only)*
- Appointments/Scheduling
  - Advisor calendar integration
  - Front desk and kiosk check-in
  - Text appointment reminders
- Appointment Campaigns

**Chairs and Deans**
- Institutional Reports
- Email communication with students
- Advanced Search

**Students**
- Schedule advising appointments
- View class information, shared notes, personal calendar
April 20-21: Training sessions hosted by EAB Experts (Amanda/Maanie) with Directors and Specialists serving as support.

- **Professional Advisors in Advising Centers**
  - Session 1: Thursday, 4/20, 9:00-11:30, Lib Lec 2
  - Session 2: Thursday, 4/20, 1:00-3:30, Lib Lec 1
  - Session 3: Friday, 4/21, 9:00-11:30, Lib Lec 1

- **Front Desk and Center Management**
  - Session 1: Thursday, 4/20, 4:00-5:00, Lib Lec 1

- **Faculty and other Non-center Advisors**
  - Session 1: Thursday, 4/20, 1:00-2:30, KH C2088
  - Session 2: Thursday, 4/20, 3:00-4:30, KH C2088
  - Session 3: Friday, 4/21, 9:00-10:30, Lib Lec 2
  - Session 4: Friday, 4/21, 10:45-12:15, Lib Lec 2
Training and Support Website

Student Success Collaborative (SSC)

Cal State LA’s Student Success Collaborative by EAB puts predictive analytic technology in the hands of advisors so that they can help students make informed decisions about their education. It provides advisors with tools to communicate with students, make appointments, document discussions, and make referrals to other offices on campus. Using EAB, advisors will be able to track student progress, reach out early to students who may benefit from additional supports, and develop new strategies to promote student success.

<table>
<thead>
<tr>
<th>Access the SSC Campus Test Site</th>
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<tr>
<td><strong>Warning!</strong>&lt;br&gt;For Training and Testing Only</td>
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<th>Education Advisory Board Resources</th>
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<tbody>
<tr>
<td>› EAB Help Center</td>
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<tr>
<td>› EAB Best Practice Research</td>
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<tr>
<td>› Other Resources</td>
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Kelly Arendt<br>e-Advising Project Manager<br>Enrollment Management Technology

Need Assistance?<br>Please contact your areas’ SSG Specialist or Director of Advisement for support
Week of April 24:

- **Training instance:** Advisors practice and explore in sandbox using specialists as resource.

- **Scheduled open labs** available with our Project Management experts (Kelly/Richard) to answer questions or resolve issues
  - Monday, 4/24 9:00-11:00 SH C259
  - Tuesday, 4/25 3:00-5:00 KH B4009
  - Wed, 4/26 4:00–5:50 KH C2088
Week of April 24:

- **April 27-28: Production Instance available to Advisors**
  - **All Advisors:**
    - Confirm access!
  - **Center Advisors:**
    - Advisors set-up availability,
    - Sync outlook calendar,
    - Re-set up any appointments booked in Appointment Plus for dates after the 28th. Note: students will get appointment emails when appointment is set-up as well as text reminder the day of the appointment.
    - Final check of kiosk readiness

- **Appointments Plus** – April 28, turn off the ability for students to request appointments for transitioning centers.
May 1:
- **All Advisors:**
  - Utilize EAB Campus to inform advising sessions
  - Record advising ‘intelligence’ in EAB Campus

- **Center Advisors:**
  - Advising center revised web site live at start of day
  - Centers start to use Kiosks for check-in
  - Advisors start using EAB Campus to see appointments

- **Students:**
  - Students begin using EAB Campus to book future appointments with Centers
The Journey Continues

May 10 and beyond

 Specialist Group
  ◦ Are we stable? Do we have urgent needs?
  ◦ Start exploring targeted campaigns and group workshop campaigns
  ◦ Explore walk-in and check-in techniques with Kiosks
  ◦ Consider when to use “Request Advising” feature
The Journey Continues...

**Follow-up Areas after Go-live**
- Training and access for new users
- Training for faculty who didn’t opt-in for the go-live
- Should we discontinue use of advisor notes in GET?
- Explore Career Features
- Import student photos into EAB
- Import Graduate and Credential students
- Explore ways to schedule appointments with faculty and other non-center advisors
The Journey Continues...

And there is more to explore!

- Tutoring management and tracking
- Referral cases
- Progress Reports (instructor polling)
- The Institutional Reports
- EAB best-practice research
Aligning our community, processes and technology in support of student success.