



Designing and Implementing **Targeted Advising** Campaigns

Toolkit for Faculty and Staff Academic Advisors

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About This Toolkit

Do you want to identify groups of students to intervene with to improve their chances of academic success? Are you exasperated by the time it takes to reach numerous students and provide them the information they need to take action now?

Today's Lesson: Targeted Appointment Campaigns

Targeted appointment campaigns enable advisors and other student success faculty and staff to direct outreach to specific populations of students in need of supplemental attention. By putting a special focus on the students who they can help the most or with actionable next steps, advisors are able to maximize the overall impacts of their efforts.

Navigate makes it easier to execute your campaigns with a suite of tools (analytics, workflow, and student engagement) for quickly identifying, contacting, and meeting with students. By deploying Navigate analytics in combination with workflow tools, advisors can create highly-specific campaigns and ensure that no students fall through the cracks.

This toolkit provides step-by-step technical instructions for designing your own strategic advising campaign utilizing Navigate. Please contact your Strategic Leader with any questions.

Student Success Staff and Faculty use Appointment Campaigns to...



Make a greater impact on student success through improved processes for identifying and reaching students



Focus limited staff and faculty time on manageable groups of students



Efficiently channel targeted outreach, resources, and attention toward groups of students with similar needs



Explore and popularize innovative ideas for data-driven advising practices

Note to Members

This toolkit is intended for Navigate members who have implemented the Advisor View function within the Navigate platform.

Creating a Campaign Plan

Step 1: Define a Target Population

1. Brainstorm a group of students that might need intervention (see worksheet p. 6)
2. Select the parameters that will define this population and create a campaign list in the platform (see Appendix p. 9)
3. Articulate objectives for the short-term (e.g., rounds of outreach, advising sessions) and long-term (e.g., retention, tutoring appointments) impacts of your campaign

Step 2: Plan Your Outreach Strategy

4. Determine interaction type and frequency (track different types of outreach to inform future campaigns)
5. Craft the message keeping in mind the resources you want to provide (e.g., outreach, advising sessions); and action you want the student to take
6. Identify next steps for follow up (see worksheet p. 6)
7. Utilize the appointment campaign functionality in the platform to launch email outreach (see Appendix p. 9)

Step 3: Evaluate and Share Success

8. Identify metrics for measuring the outcomes of your campaign and targets that will define success (consider which metrics exist within Intervention Effectiveness for easy analysis)
9. Determine how you will communicate your appointment campaign's outcomes, including communication format and audiences (e.g., other advisors, deans, Navigate consultant)

Questions to Ask When Selecting a Population

- Which students struggle but might not seek assistance or have knowledge of resources?
- What group of students am I passionate about?
- Which students need to complete specific actions in the near future to improve their chances of success or avoid barriers to their progress?

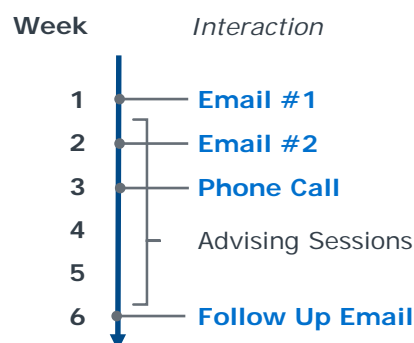
Some Parameters Available in the Navigate

Platform: GPA, assigned advisor/faculty/staff, student's last name, college/school, major, concentration, degree, credits earned, student classification, enrollment term



Create parameters that generate a manageable group of students. We recommend **30 to 75 students**.

Suggested Outreach Frequency: In successful campaigns, advisors outreached to students **3 to 5** times over a six week period during the semester



Potential Success Metrics

Process Metrics

- % of intended students contacted
- % of students complete an advising session
- # of student appointments

Outcome Metrics

- % of students persisting to next term
- # of successful major changes
- Increase in average GPA

Sample Campaign Design Worksheet

Define a Target Population

My target student population and rationale for why they require this additional attention:

Undeclared majors who attend part-time with borderline GPAs. They need help to succeed and have time to make significant changes but might fly under the radar.

Parameters I will use to create a Navigate campaign list:

- College/School: *Undeclared*
- Major: *Unknown*
- Credits Earned: *15-30*
- Cumulative GPA: *2.00 - 2.70*
- Term Enrollment: *Enrolled*

Objectives: This targeted appointment campaign will...

1. *Contact all identified students at least three times to encourage them to initiate an advising session*
2. *Schedule an individual advising session with at least 75 percent of identified students*
3. *Connect 50 percent of students with the tutoring center to work on their academic standing*
4. *Reduce these students' risk of stopping out*

Total number of students identified: 37

Plan Your Outreach Strategy

Action Steps These Students Need to Take:

- *Select a major that match their strengths and in increases the likelihood of success*
- *Seek out academic support services, such as tutoring and study habit workshops*

My Communication Plan:

Method	Timing/ Frequency	Communication Objective and Resources
<input checked="" type="checkbox"/> Email	<i>Two times, one week apart during the first half of the semester</i>	<i>First: notification of undeclared status, encourage to make appointment; second: more urgent encouragement, suggest tutoring center before midterms</i>
<input checked="" type="checkbox"/> Phone	<i>Once in the week after email #2</i>	<i>Discuss resources, why students are at-risk, try to schedule an in-person appointment</i>
<input checked="" type="checkbox"/> Advising Session	<i>Once as early in the semester as possible</i>	<i>Discuss why they are at-risk, and discuss major choice, discuss study habits and time management, plan coursework for next semester and possible increased course load to full time</i>

My Follow Up Steps:

- *Check with tutoring center to see which students have made appointments*
- *Analyze student information one and two semesters after campaign*

Evaluate Your Campaign Success

Metrics and Target Outcomes:

Metric	Target	Actual Outcome
<i>Percent of population contacted</i>	<i>100%</i>	
<i>Number of students that complete in-person advising sessions</i>	<i>31</i>	
<i>Number of students that make appointments with the tutoring center</i>	<i>20</i>	
<i>Number of students that improve their risk level by the end of the following semester</i>	<i>20</i>	

Template Campaign Design Worksheet

Define a Target Student Population

My target student population and rationale for why they require this additional attention:

Parameters I will use to create a Navigate campaign list:

-
-
-
-
-
-
-

Objectives: This targeted advising campaign will...

- 1.
- 2.
- 3.

Total number of students identified: _____

Plan Your Outreach Strategy

Action Steps These Students Need to Take:

My Communication Plan:

Method	Timing/Frequency	Communication Objective and Resources
<input type="checkbox"/> Email		
<input type="checkbox"/> Phone		
<input type="checkbox"/> _____		
<input type="checkbox"/> Advising Session		

My Follow Up Steps:

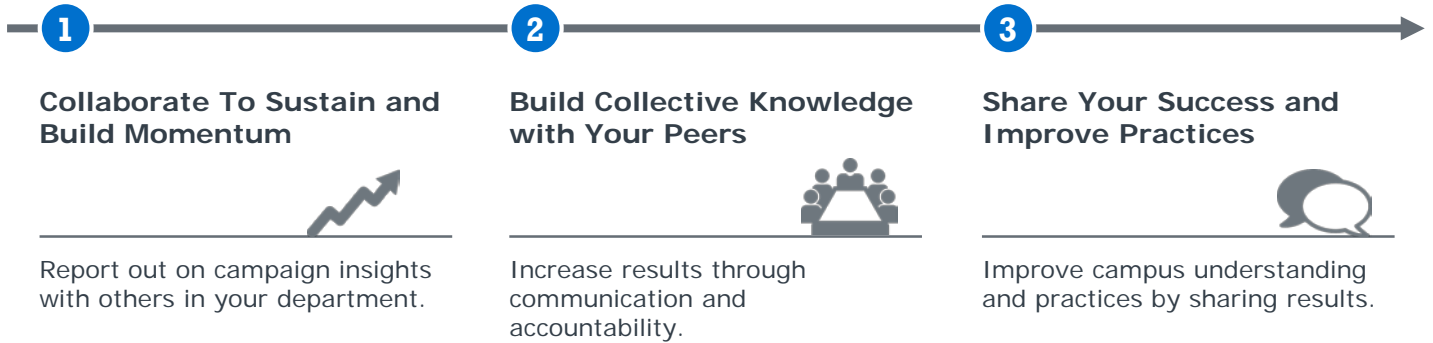
Evaluate Your Campaign Success

Metrics and Target Outcomes:

Metric	Target	Actual Outcome

Strategies to Extend Your Impact

Three Ways to Increase Your Collective Advising Efforts



Run Targeted Campaigns Concurrently

Don't keep your campaign insights to yourself. Debrief with colleagues after the completion of your targeted advising campaign to evaluate success, discuss lessons learned, and best practices. With this newfound knowledge staff will generate ideas for future campaigns.

Debrief as a Team

Run targeted advising campaigns concurrently with other advisors. Peer communication and accountability can help keep campaigns moving forward and elevate campaign quality – plus it gives you a reason to collaborate.

Present Formal Report

Sharing results with the wider campus community. Consider a formal report or presentation to share your insights with advising staff, executives, deans, and faculty members. Information may provide awareness of needed student support or services that are currently available on campus.



Technical Instructions

How to Create a Campaign in Navigate

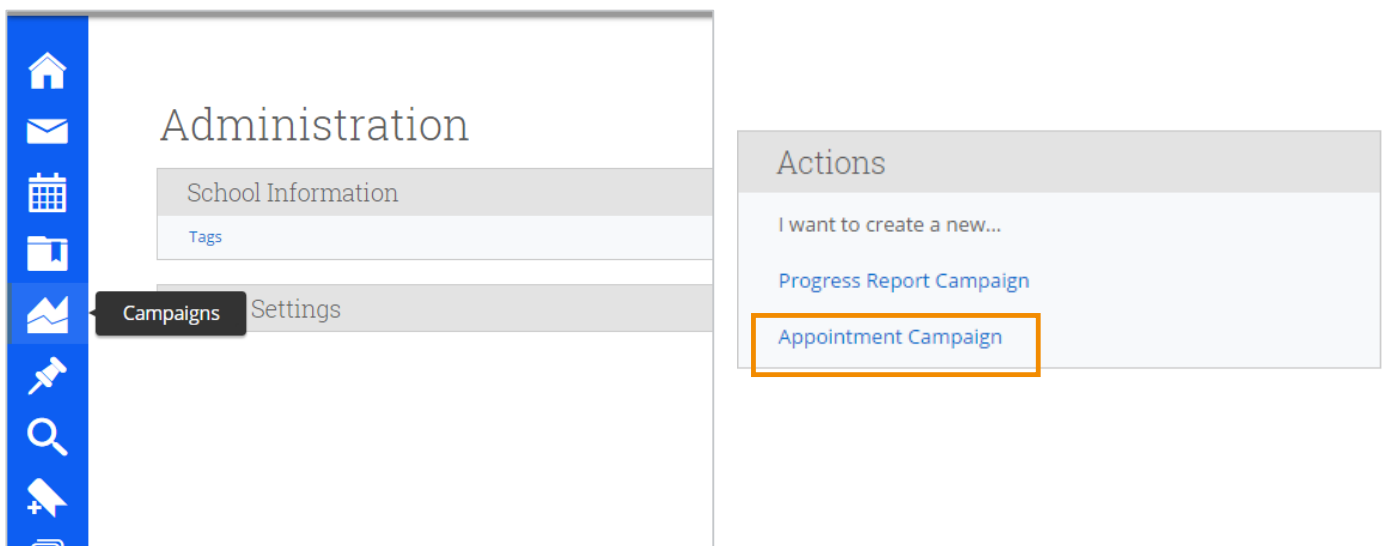
APPENDIX

Create an Advising Campaign

Seven Steps to Create Targeted Student Outreach

The **appointment campaign functionality** is the backbone of targeted outreach in Navigate. It allows users to identify a population of students and proactively encourage them to schedule appointments using custom appointment campaign scheduling links and a dashboard for tracking communication. Appointment campaign functionality in Navigate automatically tracks and reports on which students in your targeted population have received communication, scheduled appointments, and completed those appointments, allowing for effective population health management and efficient follow-up.

- 1 Use the left-hand side bar to navigate to the Campaigns page, and then select 'Appointment Campaign' from the Actions table on the right side of the screen



- 2 You will be prompted to define the campaign
Fill in each field to name and set the parameters and goals of your campaign

Define Campaign

Several field options are dependent on other selections you make. For example, the campaign type (advising or tutoring) will produce the options available for 'course or reason'.

How many appointments should the student schedule?

How many students can sign up for a time slot at one time?

What is the goal of the appointment?

Campaign Name:

Campaign Type:

Slots Per Time:

Course or Reason:

08/01/2017 08/31/2017

Appointment Length:

Appointment Limit:

Location:

Creating an Advising Campaign (CONTINUED)

3 Continue to the Add Students to Campaign page and use the advanced search to identify the students you want to receive the campaign outreach

Advanced Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)

Enrollment Status?
 Enrolled ▾

Enrollment Term
 Fall Semester 2017

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List ▾

Area of Study College/School, Degree, Concentration, Major

Performance Data Hours, Credits

Spring Semester 2017 Data Classification, Section Tag ▾

Course Data Course, Section, Status ▾

Assigned To Advisor, Tutor, Coach ▾

Success Indicators Predicted Risk Level, Success Markers ▾

Search

My Students Only Include Inactive

You can also choose to limit the search to only students that are assigned to you

Step 1: Select the correct enrollment status and term

Step 2: Select your filtering criteria

Step 3: Click 'Search'

- 💡

You have several options for choosing the right students to include in your campaign once you have selected the **enrollment status** and **term**:

 - **Student Information** – Filter students by name, gender, race, or a pre-existing watch list
 - **Area of Study** – Filter students by college, concentration, degree, or major
 - **Performance Data** – Filter by min. or max. credits earned
 - **Semester Data** – Filter by semester-specific data, such as term GPA or professor and section assignment
 - **Course Data** – Filter by course
 - **Assigned To** – Filter by advisor, tutor, coach, or team member assignment

Example: Craft your targeted student population by filtering for students majoring in Nursing who have completed between 30 and 45 credits

Area of Study College/School, Degree, Concentration, Major

College/School (In Any of These)?
 All

Concentration (In Any of These)?
 All

Major (In Any of these)?
 ✕ Pre-Nursing

Performance Data Hours, Credits

Min. Credits Earned?
 30

Max. Credits Earned?
 45

Min. Hours Attempted?
 0

Max. Hours Attempted?
 999

Creating an Advising Campaign (CONTINUED)

4 Review the invite list and add students to your campaign

Advanced Search

Enrolled in Spring Semester 2017 Standard User Type: Majoring In: Pre-Nursing x Min. Credits Earned 30 x Max. Credits Earned 45 x *Your applied filters here*

Search Modify Search *Check this box to import all students returned into your campaign roster*

ALL	STUDENT NAME	ID
<input type="checkbox"/>	1 Abdelwahed, Cecil	596437606
<input type="checkbox"/>	2 Abramovitz, Radha	428362883
<input type="checkbox"/>	3 Accardi, Gwen	921725358
<input type="checkbox"/>	4 Ackley, Lillian	525081749
<input type="checkbox"/>	5 Arguijo, Ahava	1010
<input type="checkbox"/>	6 Baczewski, Claire	995
<input type="checkbox"/>	7 Benike, Hide	9937
<input type="checkbox"/>	8 Berentson, Varana	2352

Review Students In Campaign

Actions

- Remove Selected Users
- Aardema, Klarika
- Alberro, Athena
- Archut, Lynette
- Avery, Max
- Bachtel, Nasira
- Bamberg, Livvy

You can also use the Actions menu to remove selected students if you would like to exclude them from the campaign

5 Add other advisors to your campaign

You will automatically be affiliated with the campaign, but you may also have the option to select additional advisors to make them available for appointments.

Add Advisors To Campaign Include Appointment Availability

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	LaToya White	Mon-Fri 8:00am-5:00pm (Fall Semester 2016)
<input type="checkbox"/>	Gina Schorr	Mon-Fri 8:00am-5:00pm (Fall Semester 2016) Mon-Fri 12:45pm-5:00pm
<input type="checkbox"/>	Emily Sentz	Tue, Thu 3:00pm-5:00pm
<input type="checkbox"/>	Griha Singla	Mon-Fri 8:00am-5:00pm
<input type="checkbox"/>	Maanie Hamzaee	Mon-Fri 8:00am-5:00pm

! Make sure that added advisors have set up their availability in the platform or students will not be able to schedule.

Creating an Advising Campaign (CONTINUED)

6 Compose the message you want students to receive

You have the flexibility to customize both the subject line and the messaging of your outreach or keep the automatically generated scripting.

Compose Your Message

Use Merge Tags like this to include each student's name in their message

{student_first_name}, Schedule an Advising Appointment

B I | [List Icons] | [Link Icon] | [Undo/Redo] | Format

Please schedule your advising appointment.

Hello {student_first_name}:

Your advisor requests that you schedule an appointment. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{schedule_link}

Thank you!

A link to schedule the appointment is directly embedded in the email the student receives

7 Confirm and Send!

The final step of the process allows you to review the parameters of your campaign, confirm the number of students included in the target population, and preview the message.

Nursing Majors

Confirm & Send

Campaign Type: Advising	Start Date: 04/06/2017	End Date: 08/01/2017
Reason: Academic Warning	Appt Length: 10 minutes	Slots Per Time: 1
Appt Location: Mentoring Center	Appt Limit: 1	Reminders: <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> SMS

Subject: {student_first_name}, Schedule an Advising Appointment

Email Preview: View

Invitees: View All (15)

Included Advisors: View All (1)

< Back Save and Exit **Send**



Once you have sent out the campaign, you will be able to **track appointments made as a result of the campaign** at any time by revisiting the Campaigns page and selecting the 'Appointment Campaigns' tab.

Spring Semester 2017 Campaigns

Appointment Campaigns All Appointment Campaigns

NAME	STATS
Transfer ADVISING [unsent] 04/08/2017 - 07/22/2017	<input type="button" value="Resume"/> <input type="button" value="Delete"/>
Nursing Majors ADVISING 05/06/2017 - 08/01/2017	<input type="button" value="Resume"/> <input type="button" value="Delete"/> ● Appts. Made (0%) ● Reports Created (0%) ● Attend. Rate (0%)
Non-Enrollees ADVISING [unsent] 03/29/2017 - 04/12/2017	<input type="button" value="Resume"/> <input type="button" value="Delete"/>



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