Proactive and Intrusive Advising

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Presentation Overview

- Working Definition
- Infrastructure Needed
  - Knowledge Infrastructure
  - Technology Infrastructure
  - Administrative Infrastructure
- Case Studies
- Implementation Challenges
- Recommendations
Advising & Student Affairs: Partners in Retention

Kurt J. Keppler
Vice President, Student Life & Enrollment
Working definition

Advising

• Provides **direction** and **insight** on potential challenges and concerns and how to handle

• By content:
  • **Academic** -- course scheduling, degree requirements, career planning, major selection
  • **Developmental** -- addresses all aspects of student development
By level

• **Proactive** - prescribe action before problem results
  • **Academic** -- Course prerequisites, requirements for majors, faculty interventions and referrals (i.e., tutoring, supplemental instruction)
  • **Developmental** -- Financial aid assistance for unmet needs, encouragement to engage in high impact practices (study abroad, leadership development, internships, student engagement)

• **Intrusive** - go beyond prescribing action to ensure students respond
  • Pre-advisement course templates
  • Mandated course selection
  • Mandatory engagement practices (living on campus, tutor or supplemental instruction sessions, pre-registration modules, attendance)
Emergent models

• Components derived from Complete College America utilize choice-reduction, intrusive advising
  • Required freshmen interest groups or residential colleges
  • Structured advising templates for the majority of courses
  • Meta-majors
  • Strategic scheduling
Fostering success

• Non-cognitive factors impacting student success
  • Financial limitations
  • Physical or mental health
  • Institutional fit/ lack of engagement
  • Family or personal issues

• Referral mechanisms for advisors to get students to correct campus resources
  • Mentoring programs - FYE, Campus Life, Minority Affairs, Colleges
  • Campus involvement - Campus Life/Activities, Residential Life, University Recreation, Athletics
  • Readiness to learn - Learning Center, Career Services, TRIO Programs, Student Health
  • Campus part-time employment - Career Services, individual departments
Moving the needle on student success

• Analytics alone may not be sufficient for success
  • Degree path mapping (the tryptik)
  • Degree path tracking (GPS)
  • Success coaching/mentoring (LSU IMPACT)
  • Advent of adaptive (personalized) learning and mastery-based (competency) learning
  • Alert systems to proactively inform advisors about student issues
    • Campus based
      • Longitudinal studies of student success through probability of success algorithm
    • Vendor-based
What infrastructure is needed for proactive advising?
Determine the key outcome that measures student success

Develop a hierarchical understanding of data
- Degree Awarded
- Graduation rate
- Retention
Build Systems Understanding

- Develop broad understanding of factors that explain key outcome at the institution
- Identify intermediate outcomes (i.e., retention) and institutional units (e.g., First Year Program) that have a role in advancing these outcomes
- Identify diagnostic metrics that allow for proactive intervention
Generate actionable insights

- Provide data that identify areas for improvement
- Provide “tools” that allows for efficient intervention in the short-term
- Create conditions to share information about effective interventions
Technology Infrastructure

Dr. Joel L. Hartman
Vice Provost and CIO
University of Central Florida
The Advent of Academic Analytics

- We have had mountains of student data for many years
- We are learning how to use it to increase student success
- We are gaining new sources of actionable data from the learning environment
A Change in Perspective

- We have tended to view students by cohorts and look backward at historical data.
- We now have real-time data sources, and can observe individual students’ status and in-course behavior.
A Change in Perspective

- This gives us the ability to look ahead predictively and intervene before a student encounters academic difficulties.

- We should view students holistically, requiring multiple sources of data and insight.
Definitions

- **Analytics**: the discovery of meaningful patterns in data
- **Academic Analytics**: the discovery of actionable patterns in academic data
- **Big Data**: a collection of data sets so large or complex that special analytical techniques must be used
Leveraging Data

- What data?
- With what analyses?
- Yielding what indicators?
- That are observed by whom?
- Who take what actions?
Leveraging Data

- With which students?
- With what results?

Refine and Repeat
Building Analytics Capacity

- Data sources
  - Student Information System
  - Learning Management System
  - CRM
  - Advising data

- What data sources have the greatest predictive power?
Building Analytics Capacity

- Analytics
  - In-house (IR or special unit)
  - Outsource
  - Dashboards / Reports
Analytics Dashboard
Data Security

- Protecting data at rest and data in motion
- FERPA compliance
- Contractual terms
Some Questions Analytics Can Help Answer

- For advisors
  - Which students should I contact today?
  - Which students are on or off track?
Some Questions Analytics Can Help Answer

- For faculty members
  - Which of my students is at greatest risk and why?
  - Are elements of my course poorly designed?
Some Questions Analytics Can Help Answer

- For students
  - Which courses should I enroll in next term?
  - Could I engage my courses in a more successful manner? If so, how?
  - I want to change majors. Which would take greatest advantage of the courses I’ve already taken?
UCF

FOSTERING STUDENT SUCCESS

Civitas Learning

Education Advisory Board

PeopleSoft Degree Audit

Mapping & Tracking

PROGRESS

PROGRESS Core Services

PROGRESS Support Programs

PROGRESS - Students

Foundations of Excellence Transfers

Audit/Track

Analyze

Project Goals
- Increase number of students attaining a degree or certificate
- Reduce time to degree
- Minimize number of student credit hours per student

BIG DATA

ANALYTICS

INTERVENTIONS

DEGREE PROGRAM

SUPPORT

Updated 7/2/15
Adaptive Learning
Vendor-based solutions

• Cost by enrollment size, campus, contract length, product usage

• Some web-based alert systems now available *(no preferences given!)*
  • Campus Labs - Beacon
  • EBI / Mapworks
  • Education Advisory Board Enrollment Management Forum
  • Grades First
  • Hobson’s
  • Noel-Levitz
  • Starfish Retention Solutions
Administrative Infrastructure

Dr. John H. Frederick

Provost and VP for Academic Affairs
The University of Texas at San Antonio
Important Questions

Who is responsible for student success?

- Student Recruitment/Admissions
- Academics
  - Academic advising
  - Faculty
  - Library and academic support services
- Campus environment: housing, dining, recreation and student activities
- Career services and planning
- Family support
• Which offices support the work of proactive academic advising?
  o Orientation programs
  o Student Financial Aid
  o Institutional Research
  o Office of Information Technology
  o Faculty, departments, colleges
  o Academic support centers (e.g. tutoring)
  o Counseling
  o University administration
How can one build an effective campus team?

- Engage a broad constituency charged with improving student outcomes
- Establish well-defined roles
- Build robust communication mechanisms
- Focus on student outcomes rather than bureaucratic conveniences—empower innovation
- Create cross-department task forces/“Tiger teams”
- Report data and analysis early and often
- Recognize and celebrate success
Other Considerations

- Who is in charge?
- Where are resources derived to support proactive advising?
- Who monitors progress and assesses effectiveness?
- How are complimentary initiatives organized and carried out?
How might proactive and intrusive advising look?

two case studies, and a cautionary tale
Case Study 1:
LSU

Kurt J. Keppler
Vice President, Student Life & Enrollment
Louisiana State University
LSU case study

• Demographic specifics
  • 5,700 freshmen, average course load 14+ credits
  • 32,000 total students on the Baton Rouge campus
  • 28.5% Non-Caucasian
  • 51.6% female, 48.4% male
  • 84.7% retention rate

• Longitudinal study of over 40,000 freshmen
  • 8 years
  • Over 40 variables studied
  • Probability of success algorithm developed
The initiative

- Algorithm gives probability of success score - showed to be more accurate than self-reported SSI
  - SSI = Student Strengths Inventory score for retention probability and academic success

- Students with probability of success scores of <90 personally phoned by college advisors, FYE staff, and other staff from Campus Life, Center for Academic Success, Career Services, and Admissions

- 300 students given Mentors (murky middle issues)

- Top 10 freshmen DFW courses studied
  - SI enhanced as a result

- Students with <2.2 GPA required to complete 90-minute IMPACT workshop in January
Significant variables on the LSU retention algorithm

**High Effect**
- GPA differential
- GPA general
- Attendance

**Medium Effect**
- Public/Private high school
- Tutoring
- Supplemental Instruction

**Low Effect**
- First Generation
- Gender (male)
‘Ideal’ retained student at LSU

- Keeps consistent GPA over time (whether high or low)
- Has medium to high GPA
- Takes fewer DFW classes in one semester
- Attends classes
- Attends tutoring or supplemental instruction
- Has low grade instability (i.e., low spread between individual class grades -- all Bs or Cs is better than combination of As and Fs)
- Lives on campus
- Has a family or home address close to LSU
- Not first generation student
Case Study 2: UTEP

Roy Mathew

Associate Vice President and Director of Center for Institutional Evaluation, Research and Planning
The University of Texas at El Paso
Applying Knowledge to Action
The University of Texas at El Paso
Case Study Outline

• UTEP Context
• Measure of Success
• Actionable insights based on Lumina-Funded Research Insights
• Examples of Data Tracking Tools and initiatives
• Newest Initiative
UTEP Student Demographics

- 23,079 Students
- 80% Hispanic
- 84% from El Paso County (6th Poorest Metropolitan Area in the Nation)
- 53% of Undergraduate Students are First-Generation
- 50% of Undergraduate Students are from the lowest income quartile
Context for Building the Analytics Infrastructure

By 2004, UTEP was nationally recognized for fostering student success.

- Dr. George Kuh and the American Association for Higher Education identified UTEP as one of 20 colleges and universities that was “unusually effective in promoting student success.” (1)
- UTEP is recognized as one of six NSF Model Institutions for Excellence for its success in creating educational opportunities for non-traditional students.

In 2004, President Natalicio asked what more could we do?

- “Moneyball” Approach
- UTEP secured two grants from Lumina Foundation for Education to study first-time (2005-2008) and transfer student success (2009-2012).
- Focused on identifying actionable insights

By 2006, UTEP began to implement insights from Lumina studies.

(1) NSSE Institute for Effective Educational Practice, Project DEEP Final Report, p. 4
Measure of Success

• Growth in Degrees Awarded (2004 to 2014)
  – **Total Degrees awarded increased by 78%** (from 2,438 to 4,350), while enrollment only grew by 24% during the same period.
  – Comparative Growth (2003 to 2013)
    • 97th percentile in terms of growth in undergraduate degrees awarded, among 2,500+ institutions awarding baccalaureate degrees
    • 99th percentile in undergraduate degrees to Hispanics, among 2,200+ institutions awarding baccalaureate degrees
Insights Based on Lumina-Funded Research

- Focus on Seniors to ensure progress and completion
- Focus on retention (term-to-term and year-to-year)
- Track success in the first term, first year, and second year
- Track success in first year courses / The (Professor) Ambler Initiative
Examples of Tools and Initiatives with Deans and Administrative Units

Please note that data in examples of tracking tools have been modified
Focus on Stalled Seniors

### Potential Graduates by SCH - All UG Students

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<th>First Name</th>
<th>Middle Initial</th>
<th>First Term Completed</th>
<th>Most Recent Term Completed</th>
<th>College Code</th>
<th>Major Description</th>
<th>Minor Description</th>
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Primary Use: Identifying status and contact information for seniors
Users: Deans, College Staff
Focus on Term-to-Term Retention

Primary Use: Tracking Term to Term Retention
Users: Deans, College Staff, Enrollment Management
Focus on At-Risk Students by Major

Tracking undergraduate students’ GPA (GPA ≤ 2.2)

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<th>Cohort</th>
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Number of students with 2.2 or less GPA. Click the number in each cell to see the detail.

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Primary Use: Identifying at-risk students and trends at program level
Users: Office of Undergraduate Studies, Deans
Ensuring Cohort Progress

Primary Use: Tracking progress of cohorts
Users: CIERP, Deans, Chairs
Newest Effort -
Working with Chairs On Pending and Potential Degrees
Assess Status of Degrees Awarded

### Degrees Awarded by College, Department and Major (Including Uncertified Data)

**Term**: AY 2012-13  
**Uncertified Data Status**: Pending

---

#### College
- Accounting (0010)
- Business Administration (Dean's Office) (0000)

#### Department
- Accounting (ACCT)
- Accounting Combined BBA/MACC (BAMA)
- Busin Admin Combined BBA/MBA (BMBA)
- Department Total
- Accelerated MBA Program (AMBA)
- Business Administration/GR (BSAD)
- Combined MBA/MPA (MBMP)
- General Business (GENB)
- International Business (IBUS)
- On-line MBA/UTEP

#### Major

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## Evaluate Pending Degrees

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<td>Ramirez</td>
<td>BS-GEOL</td>
<td>200910</td>
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### Candidates - Pending

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Identify Potential Graduates

**Potential Graduates (90+ SCH)**

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<td>Summer 2015</td>
<td>College of Business Administration</td>
<td>Department of Accounting and Information Systems</td>
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</table>

Total number of potential graduates (90+ SCH) is 313. [Details](#) [Excel Download](#)

Students with 30 SCH or less to complete degree [Details](#) [Excel Download](#)

### Department of Accounting and Information Systems

<table>
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<th>Department</th>
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**Fully Met** [Excel Download](#)

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<th>Remaining Hours</th>
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</table>
## Determine When Students will Graduate

<table>
<thead>
<tr>
<th>Student Contacted</th>
<th>Student Advised</th>
<th>Expected Graduation Term</th>
<th>Reason for Delay</th>
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<tr>
<td></td>
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<td><strong>Candidates - Fully Met</strong></td>
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<tr>
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</table>
Key Implementation Insights

- Focus on limited number of metrics
- Develop expertise to create and manage tools
- Pilot initiatives and create conditions for social learning
- Utilize effective communication strategy
Implementation Challenges

John H. Frederick
Provost
The University of Texas at San Antonio
ACADEMIC ADVISING @ UTSA

A cautionary tale about a work in progress!

John H. Frederick, Provost
The University of Texas at San Antonio
The Context – Students

- 25,000 undergraduates
- Regional draw: SA, Houston, RG Valley
- Majority minority student body
- 50% first-generation
- > 40% Pell eligible
- Evolving admission standards
- 35% 6-yr Graduation Rate
The Context – Advising in 2012

- Supported by Advising Fee ($130/sem.)
- Organized into college centers
- Standard model - no special tools used
- De-centralized authority
- Student dissatisfaction:
  - Appointments difficult
  - Walk-in lines long
  - Conflicting input from different advisors
- 1/3 of students left after first year
CHANGE!– A New Structure 2014

- Advising organized into thematic clusters
- Students assigned to specific advisors
- Centralized authority under Exec. Director
- New software tools
  - Global Advising System (CRM)
  - DegreeWorks (degree audit, self-advising)
  - Starfish (early alert)
  - EAB-SSC (initiating this fall)
- Emphasis on advising at orientation
What can go wrong?

- Advisors unhappy about structural change
- Advisors recruited away by CCs, causing caseloads to expand for remaining advisors
- Communication protocols slow to adapt
- Problems with software:
  - Global Advising - just now working as designed
  - DegreeWorks - glitches caused changes to be lost and system turned off for students
  - Starfish - clunky interface with Blackboard (LMS)
  - Difficulties inhibit advisors’ use of the tools
Some Preliminary Lessons

1. Structural change needs lots of care and attention, and guidance from the top
2. Software: Test, test, test before adopting and provide adequate resources for IT
3. Over-communicate at all times
4. Emphasize desired end result for students and roles of advisors, faculty, staff
5. Celebrate and reward success
Recommendations
Recommendations

• Identify actionable insights and not just statistical insights
• Pilot projects to entire population
• Limit resources assigned to projects
• Allow for experimentation and customization