



CONNECTED 20

Designing and Scaling Intervention Pathways Across Your Coordinated Care Network

Transformation Lab



EAB



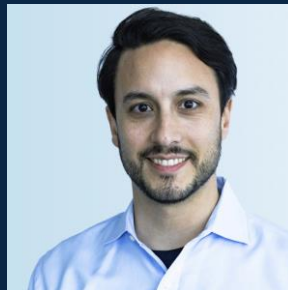
Meet Your Presenters



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Scaling Your Early Alert Process



Poll Question

2

Triage



Activity



Poll Question

3

Intervention Pathways



Activity



Poll Question

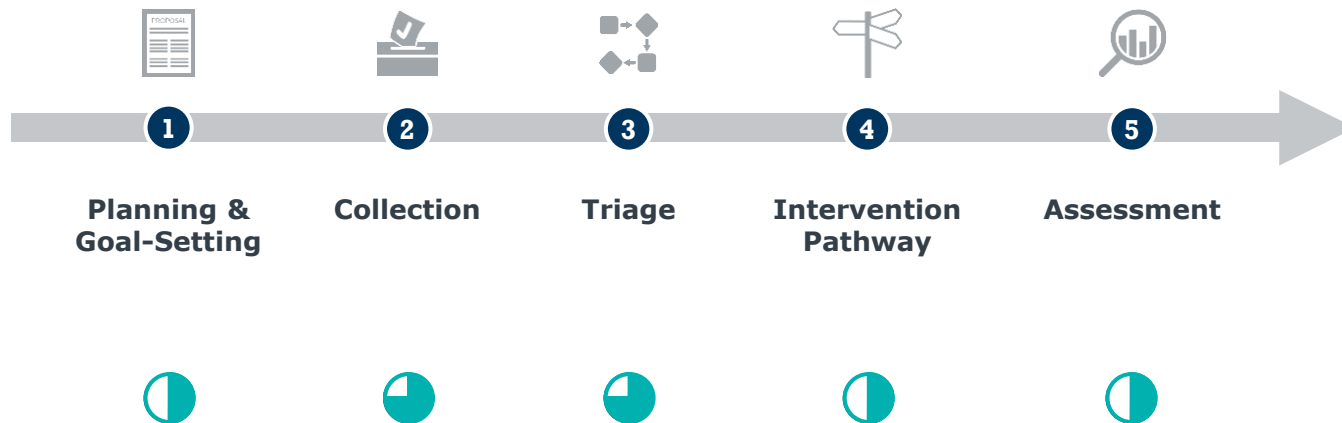
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Closing and Next Steps

A Five-Step Process to Effectively Coordinate Early Alerts

Managing Every Stage of the Early-Alert Pipeline to Improve Student Outcomes

Stages of the Optimal Early-Alert Management Pipeline and Likelihood You're Doing This Well




Where should we focus our efforts for continuous improvement?

Identifying the Need to Scale... ...Exacerbated by the Pandemic

“

We had no idea how much our **previous process was holding us back**. Because of delayed outreach, we were constrained with an **upper limit** on how many cases we could close successfully. After automating the process, we can now get outreach to students **days sooner** and **re-deploy** team members to other areas. My only regret is that **we didn't do this sooner.**”

*Bern Battle, Associate Dean, Advising Services at Reynolds
Community College*



Is your current early-alert process able to meet the likely increasing student support demands on your campus?

Yes, our process has been meeting demand
with no changes

Yes, our process has been meeting
demand, but only because we did a
re-design/update to support more students

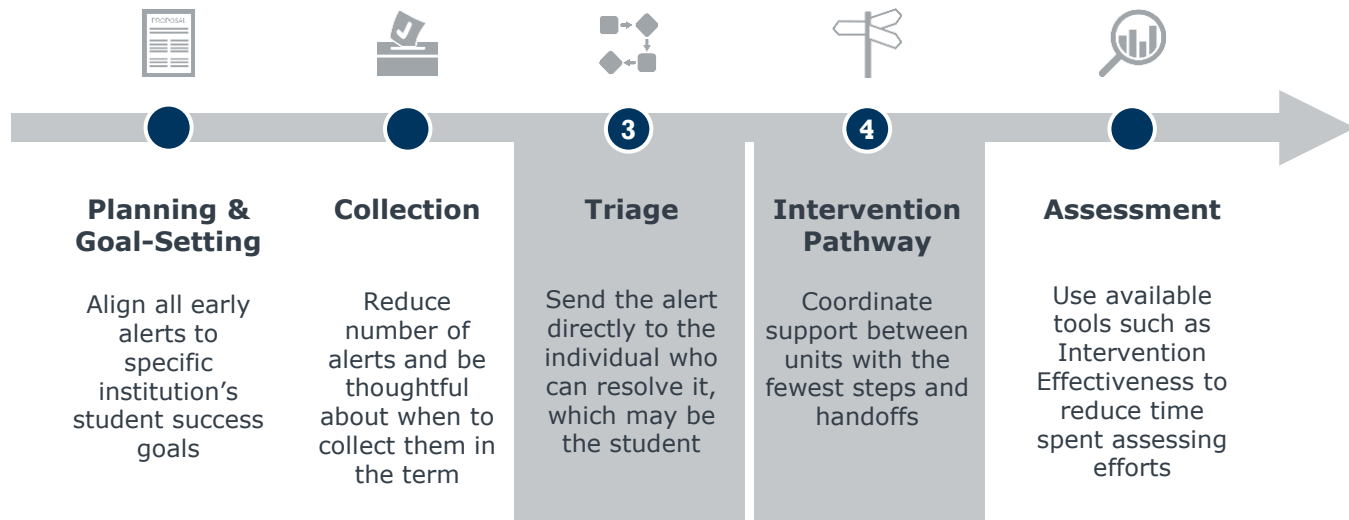
No, our process has not been meeting
demand

Focusing Our Efforts on Scale



The Triage and Intervention Pathways Steps Provide the Greatest Opportunity

Opportunities to Scale Every Step Along the Way





Triage

Send the alert directly to the individual who can resolve it, which may be the student

STEP

3

Building Triage Processes for Scale



Key Considerations

Ask Yourself These Questions



- 1 Does every alert require that a case be opened (i.e., does it require immediate attention)?
- 2 Can the student resolve this alert on their own?
- 3 How can I get the alert into the right staff hands for faster resolution? Where are there currently bottlenecks?

Choosing the Right Triage Process for Each Alert

Evaluate Each Option to Determine the Best Fit for Your Campus



Central Command

Case Opened to Central Team/Staff

- ✓ Personalize support to the student
- ✓ Maintain consistency of practice and experience
- ✗ Increase staff bandwidth to dive deeper into 1:1 support
- ✗ Support more students through additional alerts



Auto-assigned

Case Opened to Assigned Staff

- ✓ Personalize support to the student
- ✗ Maintain consistency of practice and experience
- ✗ Increase staff bandwidth to dive deeper into 1:1 support
- ✓ Support more students through additional alerts



Self-Service

No Case, Automatic Email Sent to Staff/Student

- ✗ Personalize support to the student
- ✗ Maintain consistency of practice and experience
- ✓ Increase staff bandwidth to dive deeper into 1:1 support
- ✓ Support more students through additional alerts



Most Staff Time Required

Least Staff Time Required

Finding Creative Ways to Scale Triage Efforts

Highlighting Partner Successes



*Midsize, public, two-year institution
Around 8,000 undergraduates*



UNIVERSITY OF
CENTRAL FLORIDA

*Large, public, four-year institution
Over 59,000 undergraduates*

Challenge

Had a **manual, central command style** triage process. Assigned advisors were often assigned cases that they could not resolve, and **cases had to be referred elsewhere** on campus.

Solution

Using **Custom Relationships** in Navigate, JRCC established an **automated triage process** that assigned open cases to the proper individual.

Impact

JRCC was able to **save 15+ hours per week** for the two staff who handled the previous triage and was able to **reallocate that time to create a needs assessment and close out cases.**

Partner **needed an alert process that was more sustainable and manageable** for advisors and Retention Intervention Team.

Created **retrievable alert system** where any advisor can add **"Plans to leave UCF" Tag** to any student profile if worried student might not be retained. Retention Intervention Team runs reports on this Tag and provides necessary interventions.

Since launching, UCF has seen a **2.6% increase in FTIC retention**, a trend that has improved even amidst the impact of COVID-19.

Replicable Practices to Consider



Clear Delineation Between Self-Service Versus Case Creation in Alert Reasons

Certain alerts raised on students require only a nudge or automated sharing of resources through email, as opposed to starting a full case management workflow.



Creative Note Reasons for Retrievable Insights

Launch unique Note Reasons that can be utilized for retention purposes. These Notes are easily retrievable through the Notes Report for timely action.



Leverage Tags and Student Lists for Relationship Types

Users can leverage Tags and Student Lists to support their triage efforts. Through Navigate's Mass Edit of Students, these students can easily be assigned to various types of "case managers."



Cross-Campus Support and Coordinated Care Network

Involve relevant stakeholders on campus who are needed to resolve cases. This will help to eliminate the constant "bouncing around" that students experience when trying to get support on campus.

Now It's Your Turn: Outline & Scale Your Triage Approach

Do the Activity and Answer the Poll

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Triage

Step One: Fill in each alert reason configured in your Navigate platform and indicate with a checkmark your current approach for triaging those alerts, selecting more than one if needed. Count each method and indicate the total in the final row.

Step Two: Indicate if your current approach for each alert could be scaled towards self-service (on the spectrum of triage options), with a "Yes", "No", or "Maybe" in the first column. Make additional comments as needed in the second column as potential changes come to mind.



Step One: Outline the Process

Alert Reason	Central Command <small>Case Opened to Central Team/Staff</small>	Auto-Assigned <small>Case Opened to Assigned Staff</small>	Self-Service <small>No Case, Only Automatic Emails</small>
Financial Concern	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Step Two: Revisit to Scale



Can you further scale this triage approach?	Comments
Yes	Send directly to assigned financial counselor

Download and Open the Worksheet for This Session

1. Go to the first page titled "Triage."
2. Type in your institution's alert reasons in the first column.
3. Check-mark the current triage approach for each alert reason.
4. For each alert, consider if you have an opportunity to scale the triage process.
5. Make notes in the "Comments" column.

Spend the next **few minutes** on this activity. Get as far as you can!





After reviewing your alert reasons, where is your best opportunity to scale your Triage process?

Fewer alerts reasons should create cases

Assign more cases directly to appropriate staff members

Leverage self-service for some alert reasons

Fewer alert options should be available for issuing

Not using early alerts yet, but looking forward to scaling those efforts

Not sure / no areas need scaling



Intervention Pathways

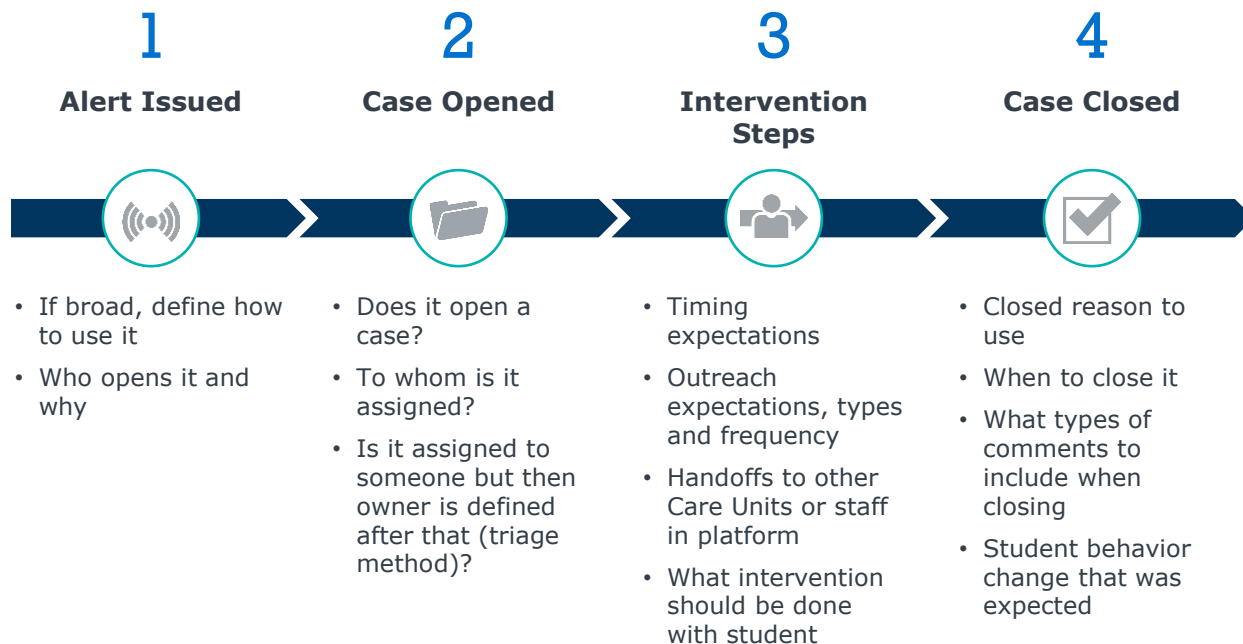
Coordinate support between units with the fewest steps and handoffs

STEP

4

Anatomy of an Intervention Pathway

Four Key Components to Outline for Your Staff



Key Considerations

Ask Yourself These Questions



- 1 Does each alert have a clearly defined intervention pathway?
- 2 Can we remove any steps to make our intervention pathways as efficient as possible?
- 3 Are outreach expectations for staff explicitly outlined and also sustainable?

Starting at Scale with Intervention Pathways

Highlighting Partner Successes



University of
Pittsburgh

*Large, public, four-year institution
Around 23,000 undergraduates*

Challenge

Pitt was lacking clear pathways for interventions and needed to start their case management work at scale. This required shared work around interventions as opposed to solely relying on the advisor.

Solution

This campus-wide engagement in their case interventions allowed for clear case ownership, expectations, and accountability guidelines that were shared across campus. Their pathways document highlights how each department handles their alerts and interventions.

Impact

Pitt has been able to handle a 214% increase in alerts being issued since March 2020 without needing to add additional staff capacity.



Referral Table

Updated November 20, 2020

Office/Service	When a referral should be made	What action will be taken	When referral will be closed
Honors College Referral	An Honors College referral should be made when a student expresses a general or specific interest in Honors College opportunities (e.g., Honors courses, research programs, national scholarship competitions, the BPhil degree, applying to the Honors program) or when an advisor believes a student can benefit from engaging with the Honors College. <i>This referral should be used for students on the Pittsburgh Campus unless the student is transferring from a regional campus.</i>	The Honors College will respond to the student with a personalized email. If detail is provided in the additional comments box, the email will refer the student to specific opportunities. If no detail is provided, the email will refer the student to general opportunities. The email will be sent within one week.	Although this referral will generate a case, these cases will not be managed and will be closed immediately.
Office of International Services Referral	A general referral to the Office of International Services could be made for international students in the following instances: <ul style="list-style-type: none"> - Interest in an internship/field placement/practicum, etc., OFF CAMPUS - Withdrawal from class after Add/Drop period - Leave of Absence - Transfer to a different institution - Post-Graduation Plans (employment, grad school, etc.) 	The student will receive an automated email with information about how to best get in touch with OIS (e.g., appointment information).	No case opened.
Office of Veterans Services	A referral to the Office of Veterans Services should be made when a staff person (e.g., instructor, advisor) learns that a military affiliated student is struggling academically, dealing with a personal issue that may interfere with academics or require	The response to the student will depend on the nature of the issue. If a coordinator in the Office of Veterans Services is not already aware of the situation, they will gather information from the referring person (e.g., advisor, financial aid counselor), check notes,	If the advisor believes there is no follow-up necessary, the case will be closed. If the advisor believes outreach is necessary, they

Scaling Intervention Pathways

Replicable Practices to Consider



Reduce Number of Handoffs Between Offices

Keeping capacity of staff in mind will make your interventions more efficient and effective; make sure that the person who can resolve the case is managing the case.



Include Action Step in the Name of the Alert Reason

Understanding easily which alerts create cases, which alerts are kudos, and which are just feedback allows for staff to better manage their time and workload.



Outline Clear Pathways and Make Accessible on Website

Transparency around pathways will allow for greater buy-in, consistency, and accountability for your interventions.



Consistent Timeline Expectations for Outreach and Interventions

Outreach and interventions must be timely, and clarity on timeline expectations ensures students get what they need, when they need it.



Coming Soon: Personal Availability Links that could be used for entire offices involved in the early alert process.

Now It's Your Turn: Outline & Scale an Intervention Pathway

Do the Activity and Answer the Poll

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Intervention Pathway

Step One: Across the top, indicate the alert reason for the intervention and the outcome you hope to achieve. Then, input all intervention steps required to achieve that outcome, in as few steps as possible. Count the total number of steps and indicate in the final row.

Step Two: Indicate if each intervention step could be scaled towards self-service, with a "Yes", "No", or "Maybe" in the first column. Make comments in the second column as you consider ideas for follow-up, such as configuration changes in the platform (e.g., new care units, relationship types, user permissions).

Step One: Outline the Process

Starting Point: What is the student concern or issue (i.e., the alert reason)?

Academic Concern

End Point: What behavior change or outcome from the institution and/or student will address this concern?

Student improves their final grade in the course

With your starting and end points in mind, input below the intervention steps for this specific scenario. Challenge yourself to write the FEWEST STEPS possible to achieve the desired outcome.

Intervention Step	Owner <i>The stakeholder that manages this step</i>
<i>Academic advisor request for student to schedule appointment with them</i>	<i>Academic Advisor</i>
<i>Advisor refers student to tutoring and provides other resources</i>	<i>Academic Advisor</i>
<i>Tutoring office reaches out to ensure student attends</i>	<i>Tutoring Director</i>

Step Two: Revisit to Scale

Can you further scale this intervention step?	Comments
Yes	<i>Send student directly to tutoring</i>
Yes	<i>Automatically send resources once alert is issued</i>

Download and Open the Worksheet for This Session

1. Go to the second page titled "Intervention Pathway."
2. Type in the alert reason.
3. Type in the outcome you hope to reach with this intervention.
4. Write out each step required to go from the Start Point to the End Point, with the owner.
5. For each intervention step, consider if you have an opportunity to scale.
6. Make notes in the "Comments" column.

Spend the next **few minutes** on this activity. Get as far as you can!



After reviewing your intervention pathway, how many steps do you think you could scale?

0, but I identified a
different way for efficiency

1

2

3 or more

Not sure / no areas need
scaling



Closing and Next Steps



Sustainability & Scalability Going Forward

Take This Work to the Next Level by Holistically Reviewing Your Early-Alert Process

GETTING STARTED

1. Complete the **early-alert diagnostic**.
2. Work with your Strategic Leader to facilitate an **Early Alerts Workshop**.
3. Work to **build culture** around early alerts **and engage relevant stakeholders** in planning processes.

SETTING UP

1. Start to **leverage EAB resources** to develop various stages of early-alerts process:
 - *Goals*
 - *Collection Timeline & Expectations*
 - *Alert Reasons, including Triage Map & Intervention Pathways*
 - *Assessment*
2. *Collaborate with your App Admin to **configure platform*** to fit needs of the new early-alert process.
3. Launch **pilot early-alert process**.



Evaluate Impact of Process

- Review feedback on new early-alert process by stakeholders
- Identify number of steps in pathways once in practice, and make improvements
- Assess the time to resolution for intended outcome
- Analyze impact on various student populations to ensure equitable outcomes
- Showcase impact with broader campus community



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