CONNECTED**24**

Streamlining Your Workflows by Maximizing Navigate360 Functionality

Transformation Lab

EAB

Meet Your Presenters

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1 **Learning Objectives**

2 Increasing Capacity by Scaling Outreach and Intervention

3 Automations and Other Tools

4 Discussion/Q&A /Workshopping

1

Describe the **benefits of structured, scaled outreach** and intervention

2

Identify two existing campus operations that can be enhanced by automations within Navigate360

3

Articulate **how automation(s) can be configured** within Navigate360

Hold on to this; we'll turn to it later in the session!

Key Tenets of Successful Student Outreach and Intervention

Timing

When does the outreach occur?

- Proactive versus reactive to events
- Strategic planning to avoid communication fatigue
- Getting students what they need, when they need it (relevance)

Owners

Who sends the outreach and owns follow-up?

- Is the communication requesting that the student take an action? What is it?
  - Who tracks that action or follows up?
- What voices do recipients prioritize?

Populations

Who is receiving the outreach?

- Is it bespoke for various groups (differentiated care) or "one size fits all"?
  - A combination of both across your calendar is a good thing!

Metrics

What happened, and how is it measured?

- Process metrics
  - How will we know the outreach is working?
- Outcome metrics
  - How will we measure success of the outreach?

How would you describe the current state of intervention planning at your institution/department?

We review our processes every year

0%

On an as-needed basis
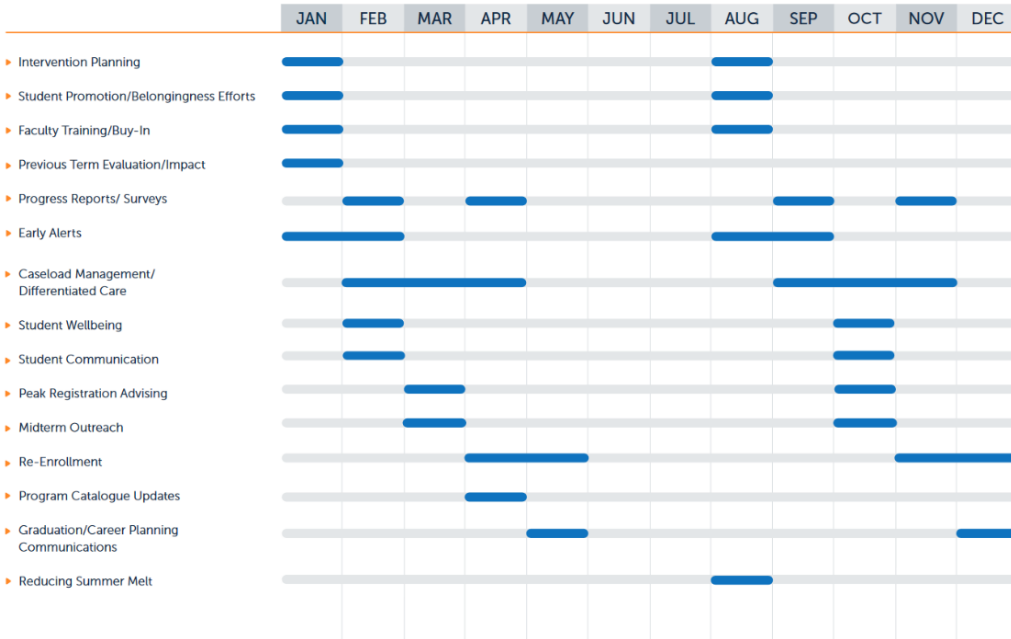
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We don't (but we should)

0%

A Framework

Student Success Annual Calendar

Topics and Tasks to Focus on Throughout the Year

As a Navigate or Starfish partner, your technology can help you support students throughout their educational journey. Use this graphic to focus your efforts on key priorities across the year.

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Intervention Planning	▬							▬				
Student Promotion/Belongingness Efforts	▬							▬				
Faculty Training/Buy-In	▬							▬				
Previous Term Evaluation/Impact	▬											
Progress Reports/ Surveys		▬		▬					▬		▬	
Early Alerts	▬▬							▬▬				
Caseload Management/ Differentiated Care		▬▬▬							▬▬			
Student Wellbeing		▬								▬		
Student Communication		▬								▬		
Peak Registration Advising			▬							▬		
Midterm Outreach			▬							▬		
Re-Enrollment				▬▬							▬▬	
Program Catalogue Updates				▬								
Graduation/Career Planning Communications					▬							▬
Reducing Summer Melt								▬				

Navigate360 Best Practices

Provide Baseline Support

Ensure students have self-service access to resources and support from all areas of campus.

- ➢ Standardized Appointment Scheduling and Check-In
- ➢ Consistent Reporting of Student Interactions
- ➢ Intentional Registration Reminders
- ➢ Resource and Milestone Communications
- ➢ Ease of Academic Planning
- ➢ Simplified Student Course Scheduling

Monitor Student Concerns and Feedback

Actively surface additional student needs and equity gaps.

- ➢ Feedback Goal Setting and Prioritization
- ➢ Faculty Raised Concerns and Positive Alerts
- ➢ Staff Raised Concerns and Positive Alerts
- ➢ Student Raised Concerns
- ➢ Data Informed Support

Scale Actions and Differentiate Care

Tailor student support based on need, coordinating and automating whenever possible.

- ➢ Coordinated Outreach Calendar
- ➢ Differentiated Outreach Calendar
- ➢ Intervention Pathways for Concerns and Alerts
- ➢ Evaluation of Intervention Effectiveness

1 Learning Objectives

2 Increasing Capacity by Scaling Outreach and Intervention

3 **Automations and Other Tools**

4 Discussion/Q&A /Workshopping

Which streamlining mechanisms in Navigate360 is your office or institution currently leveraging? (select all that apply)

Automated alerts

0%

Automated messages

0%

Custom relationship types

0%

Auto-assignments to relationships

0%

None of the above

0%

Automations Overview

What are Automated Actions?

Workflows built on the following logic: If X, then Y.
- X = a student meets the criteria of a specific saved search
- Y = send a message (SMS or email) OR issue an alert

Sample Messaging Automations

Intake Survey Responses

Email all students who say they are interested in certain resources with a message to connect (exclude initial matches)

New Assigned Students

Email students with what to expect in the coming year + your Personal Availability Link- PAL (exclude initial matches)

Category-Based

Email all first-generation students with a welcome message

Sample Alert Automations

Summer Melt

Issue an alert on any students who have 0 enrolled credits in the upcoming term (exclude initial matches)

FAFSA Completion

Issue an alert for students with a category "FA info needed" coming from the SIS

Missed Success Markers

Issue an alert for any student who has missed success markers

Conditions and Scheduling

Automation Conditions

Choose a Saved Search to specify the criteria students must meet for inclusion in your automation. Then choose the action you would like to take when students meet the Saved Search criteria. Choose any additional selection based on the automation action. Note that you will need to set these up in advance.

IF... students match the criteria in this saved search *

Transfer1-1.5GPA   X   ∨

Preview Saved Search ↗

THEN... take this action *

Issue Alert   ∨

Automation Schedule

Specify how long the automation should run. Then choose how often you want to check for new students that match the criteria. Any new students who meet the criteria will be added to the automation and the action will be applied on this schedule. You will be notified by email 2 hours before each automation run. You will be able to review a list of students included in the automation and have the opportunity to cancel an automation run or to omit individual students.

Automation Duration
How long would you like your automation to run?

Start   End

January 1, 2024 ∨   April 1, 2024 ∨

Automation Frequency
How often should we check for new matches? The selected action will be processed at the interval and time of day in your institution's time zone, subject to processing time delays.

○ Daily

● Weekly

Day *

Tuesday   ∨

○ Monthly

Time *

12:00 PM 🕐

Advanced Search

Popular Advanced Search elements for automation:

- Success Markers
- Full-Time Status
- New Assignment

- Categories are system-wide identifiers or student attributes that are used to **group students into cohorts**.

- Users can view these categories on a student's profile and as a single student. They can also use these categories as a filter in the Advanced Search feature to **identify students who meet specific criteria**.

- Popular Categories for automation:

  - **Academic Probation/Notice**
  - **Holds**
  - **Missed Success Markers**

New Search

Saved Searches

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

                                                              Students

Student Information   First Name, Last Name, Student ID, Category, Tag, G

First Name?   Last Name?

Gender   Race

All   All

Category (In Any of these)?

All   +

Honor Roll (A7)
International Student (A8)
Lacrosse (A13)
Pell Eligible (A19)
Rock Climbing Club (A17)
ROTC (A14)
Rugby (A15)

Key Considerations

1	2	3	4	5	6
If…Then…	**Start with small workflows with a big impact**	**Track permissions closely**	**Understand the logic for your search parameters**	**Consider excluding initial matches carefully**	**Define success from the outset**
Always begin with your "If…Then…" Statement	Look for simple, repetitive business processes that occur in summer and are executed by a small group of staff	Automations can be viewed only on an individual user's saved lists and searches page	Check the email confirmation every time (put a hold on your calendar to make sure you are available)	In many cases, it will make sense to exclude initial matches	Consider how to measure time saved, output, frequency of errors, or another KPI (key performance indicator)

Intake Surveys – Inspiration from University of Alaska Fairbanks

A Great Place to Start

Student Intake Survey

Automated alerts & emails generated based on a student's answer to intake survey questions on the Nanook Navigator mobile app.

Student Intake Survey: All possible responses
Note: Not all responses trigger an automated alert. See the following pages for more information.

Student Intake Survey: Automated Email: Technology

Source: EAB Interviews and Analysis

Intake Survey
Inspiration from Montana State University

" We just rolled out Automated Actions this semester – we've employ them in relation to particular responses on our Intake Survey… I am the primary persona managing our day-to-day implementation of Navigate… so automation has become a necessity capacity-wise to be able to connect students with supports…

Katharine Moffat, Retention Director, via the Navigate360 Community

"

Relationships in Navigate360

Advisor

Instructor

Coach
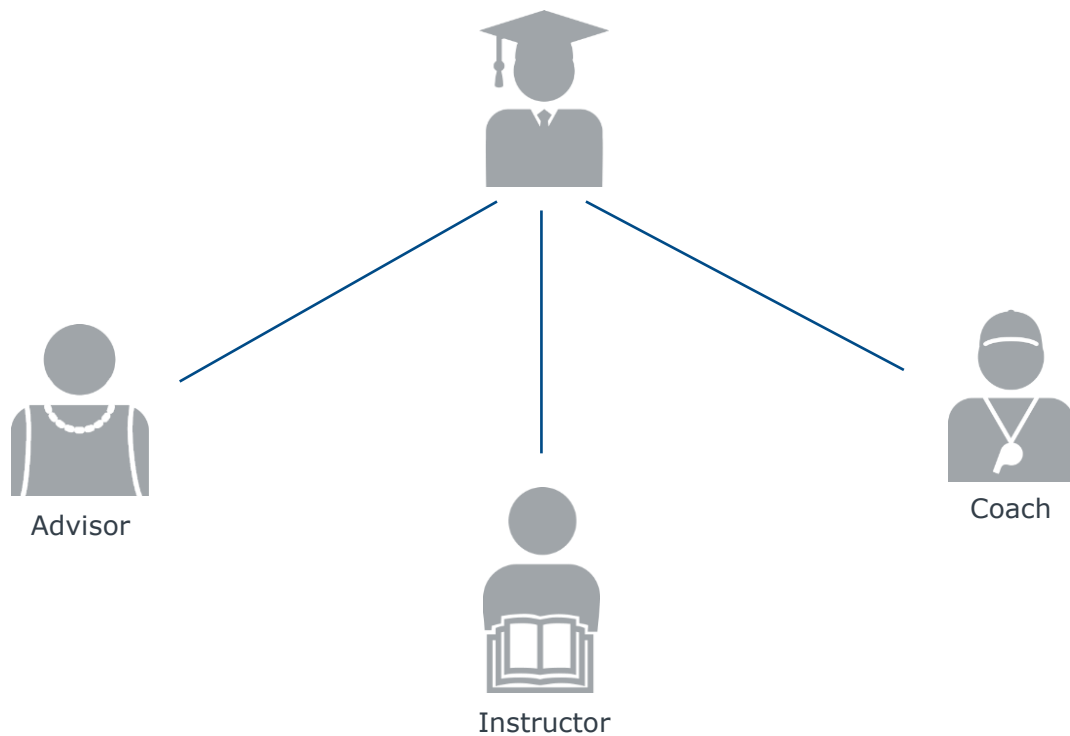
Common Relationships to Consider Adding

Department Chair or Dean

Financial Aid Counselor

Residence Hall Director

Peer Mentor

Primary, Secondary, or Pre-Major Advisor

Faculty Mentor
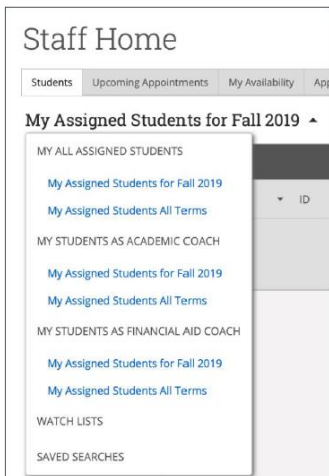
Success Coach or Academic Counselor

Career Advisor

Care Team Lead

Veterans Liaison or Advisor
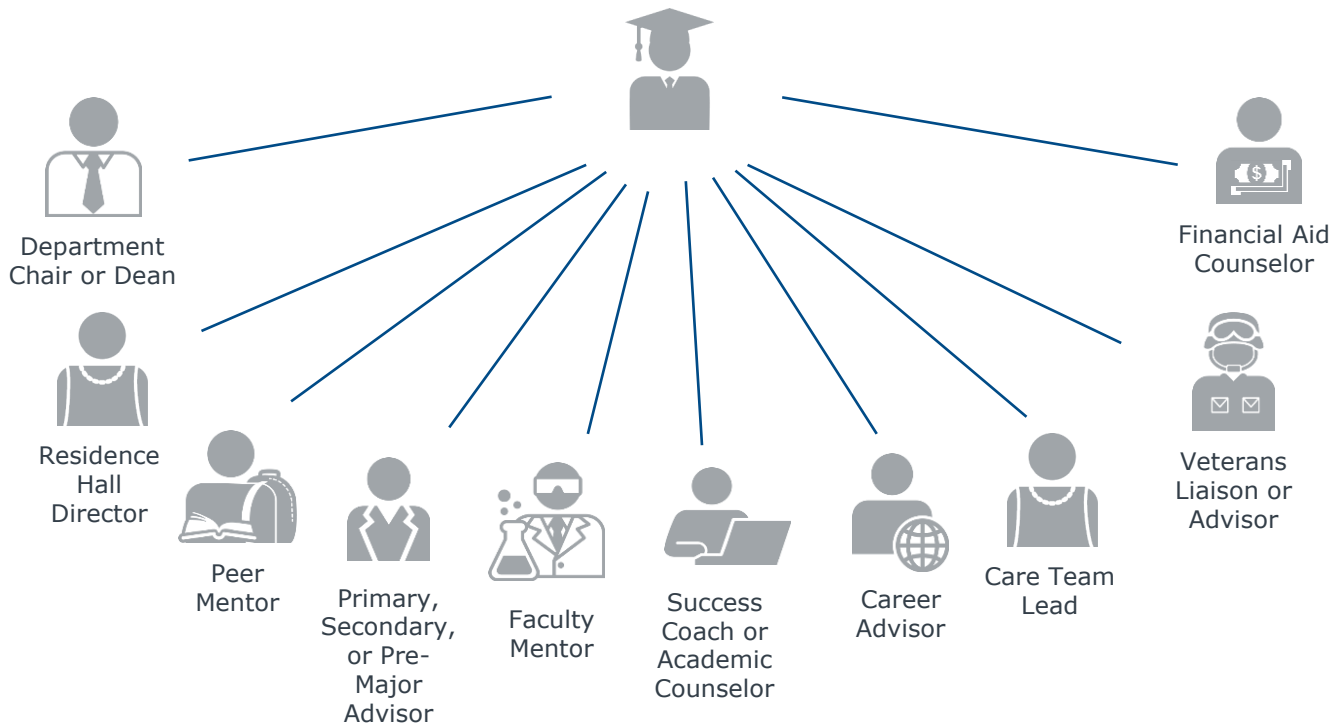
What Do Custom Relationships Impact?

Anywhere Assigned Advisor Options Exist Today, Custom Relationships Are Available

Assigned Students on the Staff Homepage

Appointment Options Available for "Assigned Staff"
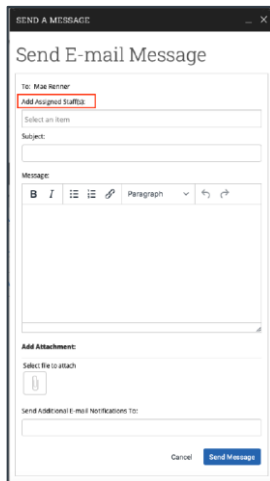
Email and Texting
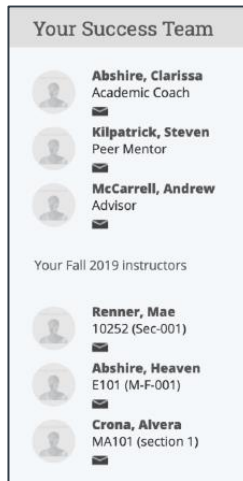
Success Team on a Student's Profile in Navigate360 Staff

Success Team in Navigate360 Student App*

(*Optional)

Automatic Alert Email Notifications

Case Auto-Assignments

Note: Assigned Staff Also Available in Advanced Search and Applicable Exports/Reports

The Mechanics

There are multiple ways to add or update staff-student relationships in Navigate360

- Automation Through Nightly Files
- Auto-Assignment by Major or Category
- Flat-File Import (CSV)
- Manual Assignment

For more info on each of these methods, see the final slide of this presentation's appendix.

Inspiration from Iowa State University

Step 1

Decided to implement a **case management model** using alerts and cases **to support re-enrollment processes**

Step 2

Created **specific alert types** for "Re-Enrollment: Not Registered:

- Hold
- Advisor
- Financial
- No Holds
- Probation Hold
- Student Health

Step 3

Set up **cases to be auto-assigned** to members of Student Success & Retention team

Results

Staff across campus **better understand the challenges and needs** of this student cohort. Model has optimized collaboration and communication and streamlined efficiency, **saving hundreds of staff hours** as they send personalized communications to unenrolled students

Inspiration from Buena Vista University

Previous State

- Cases were assigned during weekly meeting, resulting in 7-10 day delay in student outreach

- Case management approaches varied greatly, with some cases never closed out

- Many faculty complained about lack of follow up

- Meeting time was spent manually working through lists rather than discussing more serious issues or broader themes

Solution

- Moved to auto-assign system for early alert staff

- Created Early Alert Case Management Overview document to standardize approach

- Reviewed all alert types and cases and their pathways

- Introduced positive alerts

Current State

Across 2022-23 AY

- **Over 2,000 Early Alerts issued, a 38% increase from prior year**

- **94% of cases closed with student intervention or follow-up**

BUENA VISTA UNIVERSITY

Source: EAB interviews and analysis

Additional Inspiration from Across the Collaborative

Fayetteville State University

- Streamlining the Emergency Aid Assistance process
  - Needed to **break down silos** and **increase efficiency**
  - Piloted in Oct 2022 and made permanent in Nov 2022
  - "Broncos Helping Broncos" **Alert Reason** helps expedite approval process
  - **Cases** allow quick and thorough vetting by all stakeholders in this campus-wide initiative and quicker response time to aid applicants
  - **Central document storage** allows for better coordinated care and follow-up outreach to this critical population

University of South Alabama

- Custom **Success Markers** for curriculum assessment
  - Needed **scaled way to identify when student had completed core prerequisite course**s, this was only happening IF students proactively scheduled advising appointments
  - Created Success Markers to quickly identify students ready for upper-level courses in biology
  - Entire Department of Biology advising faculty was trained on utilizing advanced tools in Navigate360
  - **Specialized training** was provided for department administrators on how to use success markers for their assessment needs

Source: EAB interviews and analysis

Campaign Nudges

Behavior-Centered Emails Lower the Barriers to Action

Best Practice Nudging Tactics

Dispel **common misconceptions**

Myth #1:	Fact #1:
Most students don't qualify for financial aid.	Over 80% of students at ASU receive financial aid.

Drill in on the **task** at hand

Submit your application by the Sunday, March 1, priority deadline.

Break process into **component steps** and **link to relevant resources** so students don't have to hunt for them

[√] Get ASU's college code—it's 001081

[   ] **Retrieve your PIN**

[   ] **Figure out** if you need your parents' financial information

Send **differentiated messages** at different stages of the process

8 messages across 8 weeks

Send from a **specific person** so students feel comfortable responding

Sincerely, Melissa Pizzo
Executive Director, Financial Aid and Scholarship Service

Source: ideas42, "Nudging for Success: Using behavioral science to improve the postsecondary journey," June 2016; EAB interviews.

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Efficiency Process-Mapping Worksheet

- Start with two existing outreach/intervention processes at your campus/department.

- From our conversations today, brainstorm ideas for how to streamline each process.

- Think about what tools/workflows in Navigate360 might be helpful.

- Determine one concrete next-step!

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Share Out

Let us know what streamlining work you'll be diving into back on campus.

Don't forget to engage your Navigate360 Strategic Leader for more in-depth planning!

Resources

Help Center: Automated Actions New Feature Spotlight

Community Post: Automated Actions

Help Center: Custom Relationship Types

EAB.com: Student Success Annual Calendar

Other CONNECTED Sessions

PAST SESSION: How a Residence Life and Housing Care Unit Provides Holistic Student Support

Find resources in the app

PAST SESSION: Scaling Actions and Differentiating Care: Strengthen Your Outreach Strategy for Outsized Impact

Find resources in the app

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Appendix

Alerts Triggered by Observation-Based Risk Assessment

Success Markers

Definition: Success Markers help platform users gauge whether a student is on track in their major by comparing their behaviors and outcomes to standard milestones of degree progress and performance.

A Success Marker can be created based on information obtained via Institution Reports (through the evaluation of graduation trends among key courses) or institutional knowledge or goals.

Note: Success markers are not intended to replace degree audits.

Chemistry Major

Anatomy of a Success Marker

- **Important milestone course for the major** (e.g., Chemistry 101)
- **Minimum recommended grade** (e.g., B-)
- **Appropriate timing** (e.g., 0 – 30 credits)

Success Marker Statuses

- ✓ Success Markers already **completed**
- X Success Markers **missed** due to grade or timing
- ☐ Success Markers that are **upcoming**

Summary of All Success Markers in the Success Progress Tab

Number of Missed Success Markers on a Student's Overview Page

Success Markers and Number of Missed Success Markers as Filters in the Advanced Search

An Ongoing Process

Determine whether all, some, or a few programs should have Success Markers available in the site. Institutions often start with 3-5 markers for a major and grow/modify these over time. Your institution may start by building out Success Markers for just 2-3 majors.

Student Profile Access Can Be Limited to Assigned Student Populations

Profile Access Based on Assigned Staff

*Enables access to student profiles for specific student populations

To date, options have existed only for limiting Assigned Advisees or Professors' Students in Courses.

Four Ways to Implement Relationship Types

Options for Adding or Updating Staff-Student Relationships

Automation Through Nightly Files

- For partners implementing Navigate360, work with your Implementation BA

- For partners live on Navigate360:
  - Members will be slotted throughout spring for updates based on interest and capacity
  - Let your Strategic Leader know as soon as possible if you would like to make a change in early spring
  - Submit a Change Request form to the Member Support Team with the details

Auto-Assignment by Major or Category

- Under each user profile or through the Administration "Edit a User" page, you can choose to "Edit User Settings" and then select the appropriate Auto-Assignments by Major or Category on the bottom, right-hand side
- Assignments are updated nightly as Majors and Categories change

Consider potential new Categories you may need to add to facilitate new staff-student relationships.

Flat-File Import (CSV)

- New staff-student relationships can be manually updated in bulk by importing a CSV relationship file with details of what relationships should be added or removed

Manual Assignment

- New relationship assignments can be added through the Administration "Mass Edit of Students" page.
- Using the Advanced Search, identify the group of students you want to assign, and choose "Assign to Someone" tab. Then, add to or remove from the selected relationship type with the designated staff member.

Ensure you have a plan for long-term maintenance, including updates, to ensure lists are accurate and the process accounts for staff members switching roles or leaving the institution.
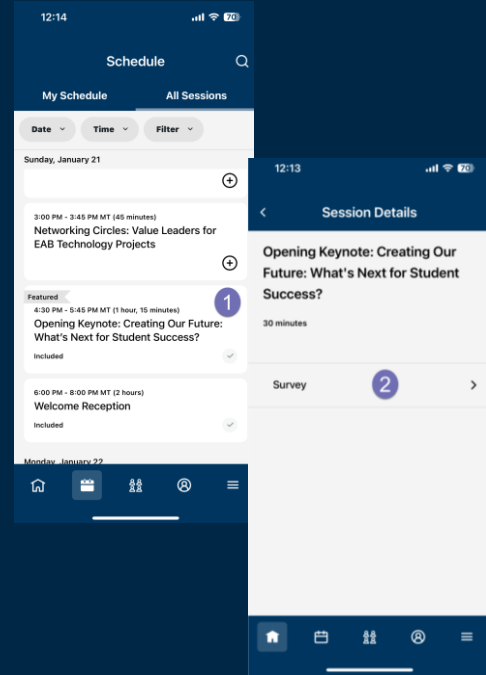
Complete Session Evaluations

Your feedback is important to us, please take a few moments to **tell us about your CONNECTED experience**.

Evaluations are available in the event app by clicking on a session and then clicking **Survey.**

Need help with the app?
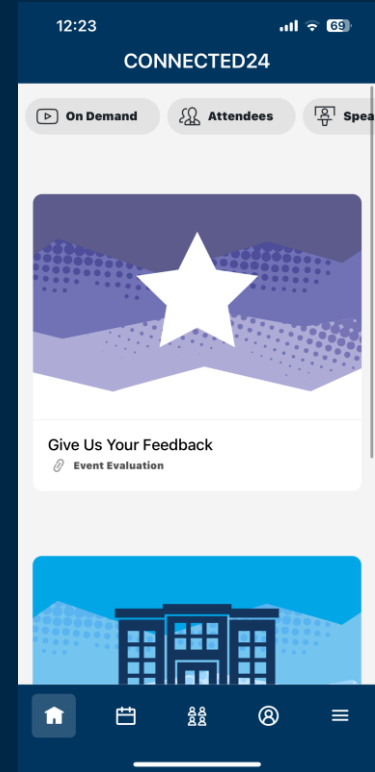
Stop by the **information desk!**

Complete the Event Feedback Survey

From the front page of the app,
click the Give Us Your Feedback box.

Need help with the app?

Stop by the **information desk!**

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Thank you for joining us for

CONNECTED24

Remember to complete the overall event feedback survey in the CONNECTED app.

Travel home safely and we'll see you next year!

EAB