# How to **Proactively Manage** Your Student Caseload

Best Practices and Tips from 550+ Navigate Schools

**Proactive advising campaigns** enable advisors and other student success staff and faculty 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**, EAB's Student Success Management System, makes it easier to execute your campaigns with a suite of tools (analytics, workflow, and student engagement) to quickly identify, contact, and meet with students. By deploying Navigate to coordinate student care with stakeholders across campus, advisors can create highly-specific campaigns and ensure that no students fall through the cracks.

# What Is Proactive Caseload Management?

## Defining an Emerging Approach to Advising

### Three "Prerequisites"

1 **Assigned Student Caseload**
Advising structure allows for reasonably sized assigned caseloads of <350 students

2 **Proactive Advising Approach**
Advisor supports students holistically with an emphasis on long-term goals, solving problems before they escalate

3 **Access to Central Technology**
Advisors and support staff across departments use a shared system to view data and collaborate

### Five-Step Framework

**1 PRIORITIZATION**
Advisor proactively identifies key factors that may indicate a need for extra support, such as:

- Low high school or cumulative GPA
- First-generation
- Financial risk
- Low midterm grades in key courses

**2 PLANNING**
Identifies critical times for outreach (e.g., registration, midterms, drop/add)

**3 OUTREACH & FOLLOW-UP**
Executes outreach, tracks responses, and follows up as needed

**4 IN-PERSON SUPPORT**
Advises students in person and refers to other offices as needed

**5 MONITORING & DOCUMENTATION**
Closes the loop and monitors whether students improve

## PRIORITIZATION
## Directing Attention to the Students Who Need It Most

### Sample Communication Schedule

| WEEK | High Level of Support Needed *5% of cohort* | Moderate Level of Support Needed *25% of cohort* | Low Level of Support Needed *70% of cohort* |
|---|---|---|---|
| 2 | Check-in/initial coaching session | Check-in/initial coaching session | Check-in/initial coaching session |
| 3 | Complete success plan with student | | |
| 4 | Assess/adjust plan | Create semester plan | |
| 5 | Assign resources or tutoring | | |
| 6 | Check-in prior to midterms | Check-in before midterms/adjust plan | Check-in before midterms |
| 7 | Reflect on first half of term | | |
| 9 | Plan from midterms | Check-in about registration | |
| 10 | Reality check/adjust plan | | |
| 11 | Check-in about registration | | |
| 12 | Register for classes | | |
| 13 | Follow-up after registration | Follow-up after registration | Follow-up after registration |
| 14 | Reflect/set goals for next term | | |
| TOTAL CONTACTS | 12 | 5 | 3 |

## OUTREACH AND FOLLOW-UP

### Techniques to Improve Response Rates

#### Optimize Subject Lines

- Email subject lines should contain **fewer than 30 characters**
- Subject lines that include a question mark or begin with "How to…" tend to have **higher open rates**
- For emails requiring an action, subject lines should be **urgent and action-oriented**, possibly including a **next step** in the subject line

#### Audit Email Content

- Use a **tone** that is student-centered and student-friendly
- Ensure **readability** by translating higher ed jargon, removing passive voice, and reducing multisyllabic words
- Keep messages **short** (<100 words) and emphasize a clear **call to action**

#### Use Alternative Channels

- Direct students to the **Navigate app** for checklists and ongoing guidance
- Use **texts** sparingly for time-sensitive messages
- If email and text don't work, some students are responsive to **phone calls** or **Facebook** messages
- If all else fails, consider an in-person **classroom visit**

**Already an EAB Navigate user?**
Access more resources and tips in the Navigate Help Center.

## MONITORING

### Choosing the Right Success Metrics for Your Caseload

#### Tips

- Select **2–3 metrics** that make sense for your specific caseload
- Track weekly in a central location, using Navigate to help pull relevant data points
- Review on an ongoing basis to prioritize within your caseload and intervene when appropriate
- During your first year of tracking, identify targets you hope to achieve then adjust goals as needed in future terms

#### Sample Metrics

| Advisor-Student Contacts | Goal | Outcome |
|---|---|---|
| ☐ Response rate to outreach | | |
| ☐ Number of advising appointments scheduled/attended | | |
| ☐ Number of interventions based on early alerts | | |
| ☐ Number of cases closed | | |
| **Student Actions or Status** | | |
| ☐ Percentage of caseload that submitted a degree plan | | |
| ☐ Percentage of caseload that declared a major on time | | |
| ☐ Percentage of caseload in good standing/SAP eligible | | |
| **Student Progress and Outcomes** | | |
| ☐ Number of milestones met/anticipated graduation date | | |
| ☐ Percentage of caseload that improved or maintained their GPA | | |
| ☐ Percentage of credits earned (vs. credits attempted) | | |
| ☐ Percentage of caseload that registered for the next term | | |
| ☐ Percentage of caseload that persisted to the next term | | |

Source: EAB interviews and analysis

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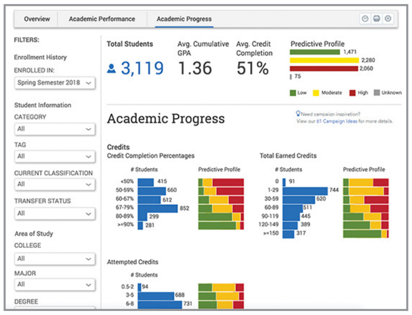
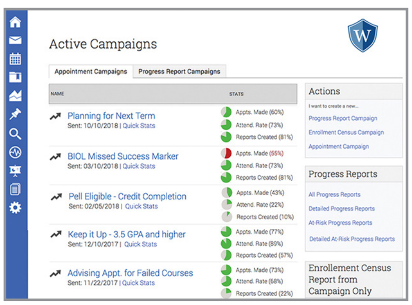
# How EAB Navigate Helps You **Manage Your Caseload**




## 1 Prioritize Attention Across Your Assigned Students

**Dashboards and Search Tools** Highlight Student Performance Across Your Caseload or College*

- Visualize performance indicators including predicted risk, GPA distribution, credit completion, DFW grades, and current registration status
- You can also use Advanced Search to identify and track groups of students based on a wide range of criteria
- You can save, export, or send outreach and appointment requests from your Advanced Search results

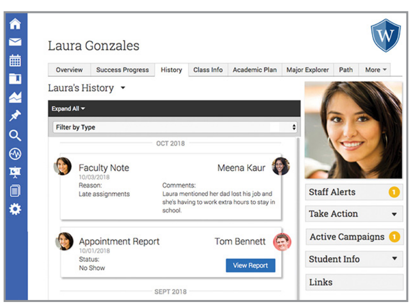



## 2 Easily Manage Your Outreach and Ongoing Campaigns

**Campaign Management** Allows You to Manage the Progress and Performance of Active Outreach Campaigns

OTHER FEATURES

- Appointment scheduling
- Automated appointment reminders
- Multimodal communication
- Free-form notes and appointment summaries




## 3 Access a History of Each Student's Interactions

Advisors Can See a **History Feed** of All Recent Appointments, Referrals, and Notes from Staff and Faculty Across Campus

- The Student Smart Profile gets you up to speed on a student's performance so you can tailor outreach and advice in the moment
- On the History tab of the Student Profile, view all previous interactions to ensure that support is coordinated and not redundant
- Easily see whether a student has followed through on your advice by attending tutoring or other services

*Dashboards are available to members with applicable capabilities. Users must have the appropriate permissions to access them.

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