Toolkit: Designing and Implementing a Student Intervention Campaign

Student Intervention Campaigns in Navigate

Student intervention campaigns enable advisors and other support staff to operationalize a proactive approach to advising students by directing 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, support staff are able to maximize the overall impacts of their efforts.

The Navigate platform makes it easier to run these initiatives with a suite of tools for quickly identifying, contacting, and meeting with students. By deploying Navigate predictive analytics in combination with workflow tools, advisors and other support staff can create highly-specific campaigns and ensure that no students fall through the cracks.

This toolkit provides step-by-step instructions and tools for designing your own student intervention campaign using the Navigate platform. Please reach out to your Strategic Leader with any questions.

Support Staff use Navigate campaigns to…

- Make a greater impact on student success through improved processes for identifying and reaching students, especially those in most need
- Focus limited support staff time on manageable groups of students
- Efficiently channel focused outreach, resources, and attention toward groups of students with similar needs
- Explore and popularize innovative ideas for data-informed advising practices

Toolkit Contents

Student Intervention Campaign Design Process

Step 1: Define a Focus Population

1. Brainstorm a group of students that might need intervention (use the worksheet on p.4 to write out each step in your design)

2. Select the parameters that will define this population and create a campaign list in the Navigate platform (For step-by-step instructions on creating an appointment campaign see p. 7)

3. Articulate objectives for the short-term (e.g., rounds of outreach, appointments) and long-term (e.g., retention, tutoring appointments) impacts of your campaign

Questions to Ask in 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 staff, student's last name, college/school, major, concentration, degree, credits earned, student classification, enrollment term, predicted success level, success markers, alerts

Check that your parameters generate a manageable number of students. We recommend **30** to **75** students.

Step 2: Plan Your Outreach Strategy

4. Determine interaction type and frequency (track different types of outreach to inform future campaigns)

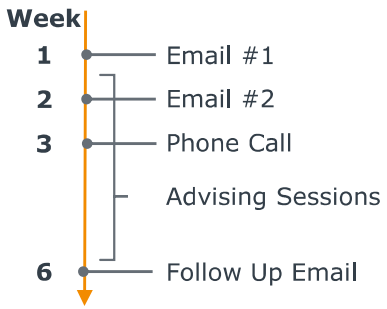
5. Articulate the messages you want to communicate and resources you want to provide at each interaction; consider the action steps this specific student population needs to take and craft appropriate messages

6. Identify next steps you will take to follow up with these students and ensure the impact of your initiative

7. Use the appointment campaign functionality in the Navigate platform to launch each round of email outreach.

Suggested Outreach Frequency: In successful campaigns, staff outreached to students **3** to **5** times over a six-week period of the term.

Example Timeline



Step 3: Evaluate and Share Success

8. Identify metrics for measuring the outcomes of your campaign and targets that will define success; consider the metrics available in the Intervention Effectiveness tool for easy analysis

9. Determine how you will communicate your campaign's outcomes, including format and audiences (e.g., other advisors, deans, senior leaders)

Potential Success Metrics

Short-Term, Process Metrics

- % of intended students contacted
- % of students who completed an appointment
- # of completed academic plans

Long-Term, Outcome Metrics

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

SAMPLE

Campaign Design Worksheet

Define a Focus Population

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

Undeclared majors in their second year with borderline GPAs. They need help to succeed and have time to make significant changes but might fly under the radar.

Objectives: This appointment campaign will…

1. *Contact all identified students at least three times to encourage them to initiate an appointment*
2. *Schedule an individual advising session with at least 75 percent of identified students*
3. *Connect 50 percent of students with the career center to explore potential majors and future careers*
4. *Reduce these students' likelihood of stopping out*

Parameters I will use to create a Navigate appointment campaign list:

- College/School: *Undeclared*
- Major: *Undeclared*
- Credits Earned: *30-45*
- Cumulative GPA: *2.00 - 2.70*
- Term Enrollment: *Enrolled*

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
☑ Email	*Two times, one week apart during the first half of the term*	*First: notification of undeclared status, encourage to make appointment; second: more urgent encouragement, suggest career center and tutoring center before midterms*
☑ Phone	*Once in the week after email #2*	*Discuss resources, why students should consider declaring, try to schedule an in-person appointment*
☑ Appoint-ment	*Once as early in the term as possible*	*Discuss why you are concerned, and discuss major choice, discuss study habits and time management, plan coursework for next term*

My Follow Up Steps:

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

Evaluate and Share Success

Metrics and Target Outcomes:

Metric	Target	Actual Outcome
Percent of population contacted	*100%*	
Number of students that complete in-person advising sessions	*31*	
Number of students that make appointments with the career center	*20*	
Number of students that declare their major by the end of the following term	*20*	

Campaign Design Worksheet

Define a Focus Population

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

Objectives: This appointment campaign will…

1.

2.

3.

Parameters I will use to create a Navigate appointment campaign list:

-
-
-
-
-
-
-

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
☐ Email		
☐ Phone		
☐ _____		
☐ Appoint-ment		

My Follow Up Steps:

Evaluate and Share Success

Metrics and Target Outcomes:

Metric	Target	Actual Outcome

Example Student Intervention Campaigns

Potential Student Populations to Consider for Your Campaigns

Campaign	Filters	Intended Action
☑ **Students with majors that do not match ideal program**	**Major:** Undeclared, General Studies **Major Explorer:** Favorited program does not match current major	Schedule appointment to discuss changing major
☑ **Undeclared students above a certain credit threshold**	**Major:** Undeclared, Pre-major **Credits Earned:** At least 30, 45, or 60 credits	Select the appropriate major and declare as soon as possible
☑ **High-performing students not currently enrolled in coursework**	**Cumulative GPA:** > 3.50 **Term Enrollment:** Not enrolled	Determine why students are not enrolled and get them enrolled
☑ **Students with excessive credits**	**Term Enrollment:** Enrolled **Credits Earned:** At least 120	Determine requirements students need to fulfill to graduate
☑ **Students in selective majors who may not meet admissions requirements**	Exact filters will vary by major **Possible Majors:** Nursing, Radiology, Surgical Technology	Encourage students to prepare a "Plan B" and seek academic support
☑ **"Stop outs" that could return and graduate easily**	**Term Enrollment:** Not enrolled **Credits Earned:** At least 100	Motivate students to re-enroll and complete their degrees
☑ **Students with excessive credit hours for the term**	**Term Enrollment:** Enrolled **Course load:** >16	Schedule appointment to review academic plan and discuss course load expectations
☑ **Students with work/life balance issues**	**Term Enrollment:** Enrolled, upcoming term **Major Explorer:** Work hours >10	Schedule appointment to review financial aid and other support service resources
☑ **Students who intend to transfer**	**Term Enrollment:** Enrolled **Major Explorer:** Stated goal is to transfer	Schedule appointment to discuss transfer plan/readiness

For more ideas, check out our two intervention campaign infographics, one specifically for 4-year institutions and the other specifically for community colleges.

Strategies to Extend Your Impact

Three Ways to Increase Your Collective Intervention Efforts

1

Collaborate To Sustain and Build Momentum

Report out on campaign insights with others in your department.

2

Build Collective Knowledge with Your Peers

Increase results through communication and accountability.

3

Share Your Success and Improve Practices

Improve campus understanding and practices by sharing results.

Run Intervention Campaigns Concurrently

Don't keep your campaign insights to yourself. Debrief with colleagues after the completion of your 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 campaigns concurrently with other advisors and support staff. 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

Share 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.

Related Resource:
Intervention Effectiveness Toolkit

If you want to take your intervention campaign evaluation to the next level, ask your Strategic Leader for a copy of our complementary toolkit on using the Navigate Intervention Effectiveness tool*. It contains a suite of resources to help you measure the impact of your campaigns and communicate your results, including:

- Intervention Effectiveness report navigation
- How to set up your analysis for success
- Post-analysis recommendations
- Data analysis and interpretation cautions
- Glossary of data definitions

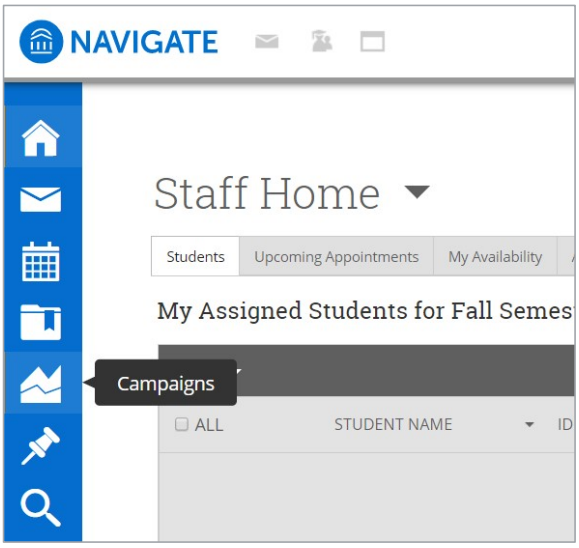
*Requires the Intelligence module of the Navigate platform

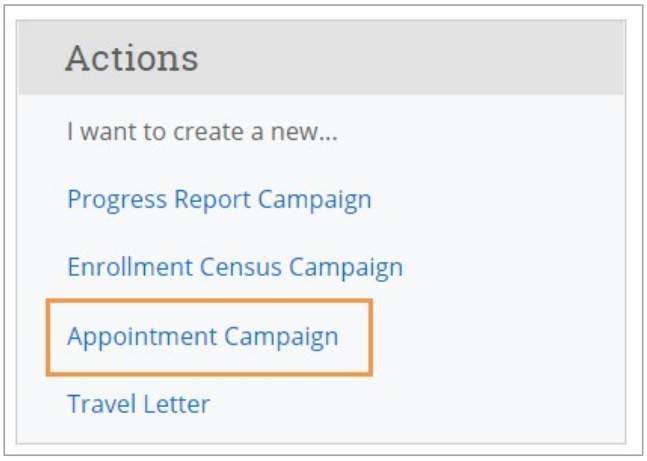
How-To Guide: Appointment Campaigns in Navigate

How to Create and Run an Appointment Campaign in Navigate

The **appointment campaign functionality** is the backbone of interventions 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 focus population have received communication, scheduled appointments, and completed those appointments, allowing for effective population health management and efficient follow-up.

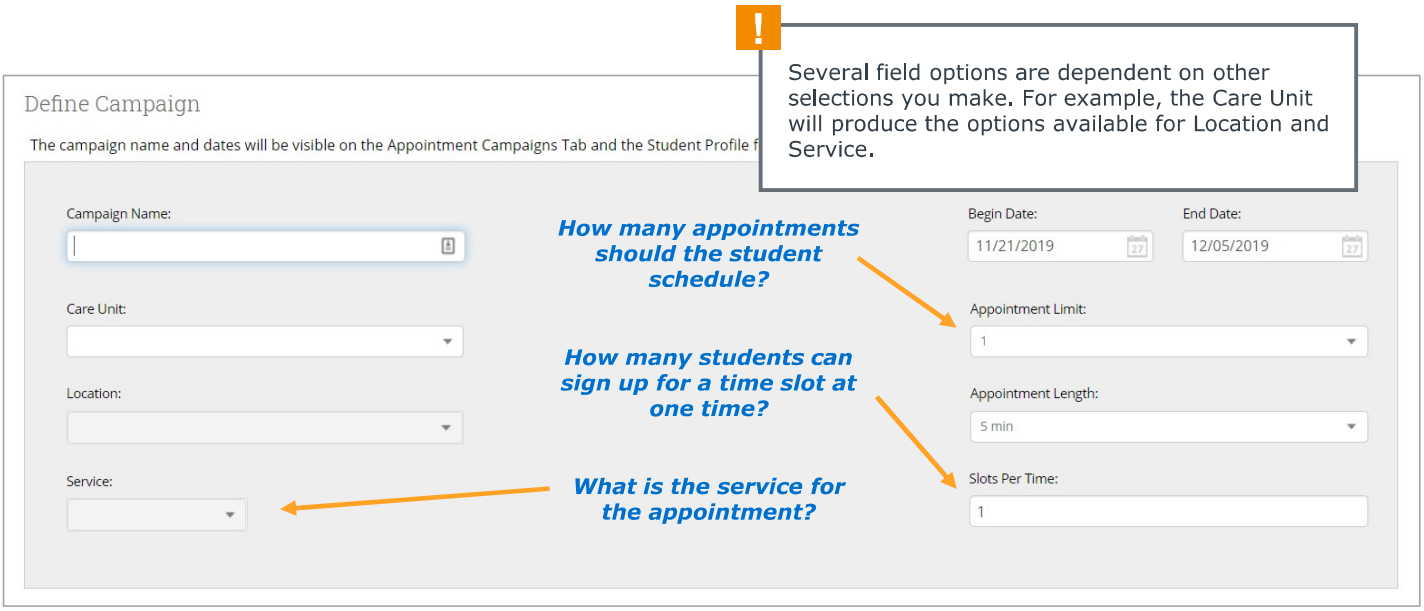
1 Use the left-hand side bar to navigate to the Campaigns page, and then select 'Appointment Campaign' from the Actions table on the right side of the screen





2 You will be prompted to define the campaign

Fill in each field to name and set the parameters and goals of your campaign



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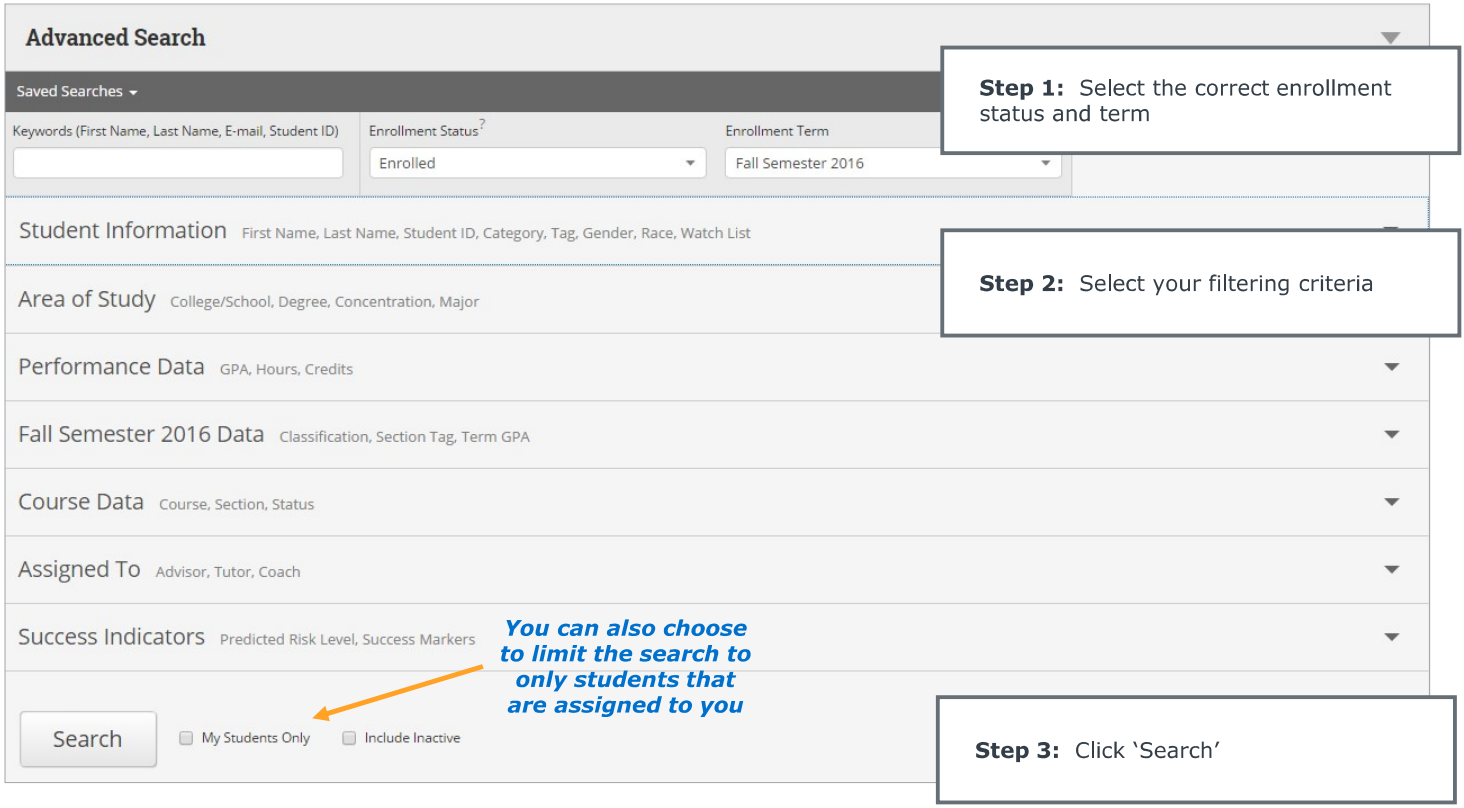
Several field options are dependent on other selections you make. For example, the Care Unit will produce the options available for Location and Service.

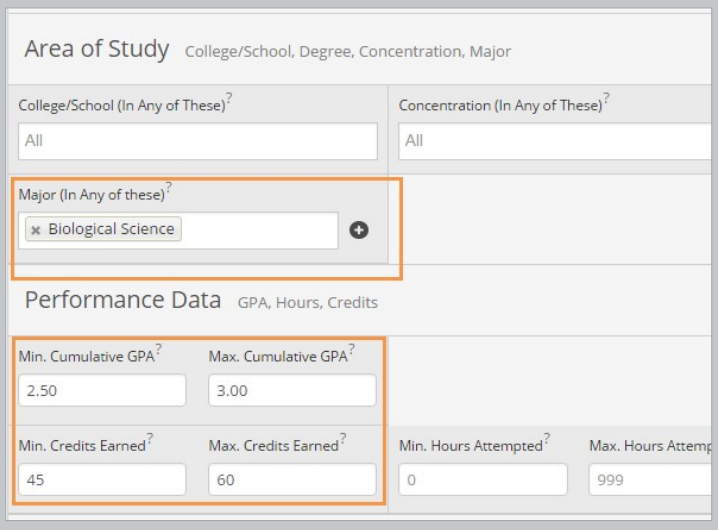
3 Continue to the Add Students to Campaign page and use the advanced search to identify the students you want to receive the campaign outreach



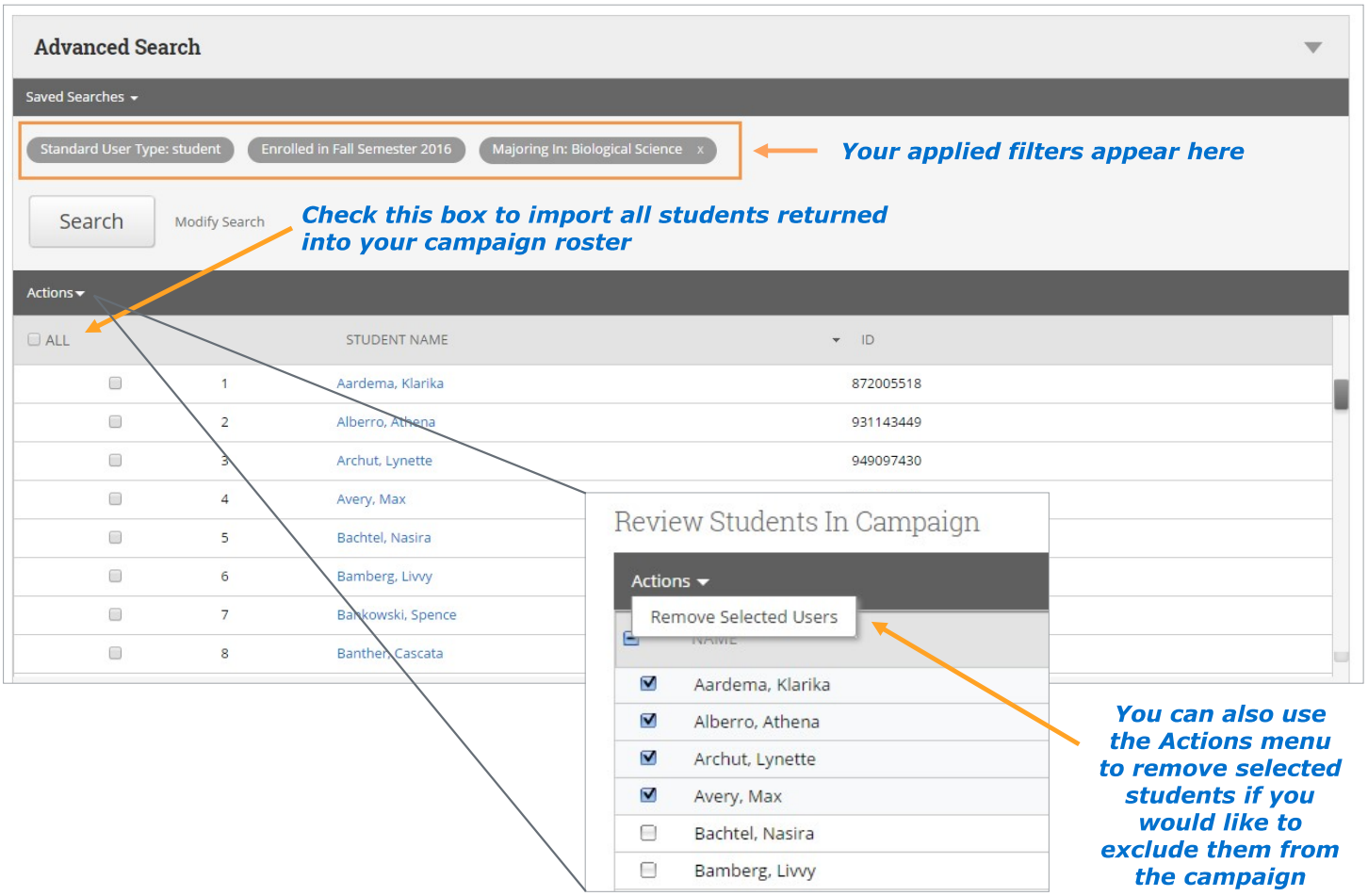
You have several options for choosing the right students to include in your campaign once you have selected the **enrollment status** and **term**:

- **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. GPA or credits earned
- **Term Data** – Filter by term-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
- **Success Indicators** – Filter by predicted risk level or specific success markers

Example: Craft your intervention student population by filtering for students majoring in Biological Science with a GPA between 2.5 and 3.0 who have completed between 45 and 60 credits

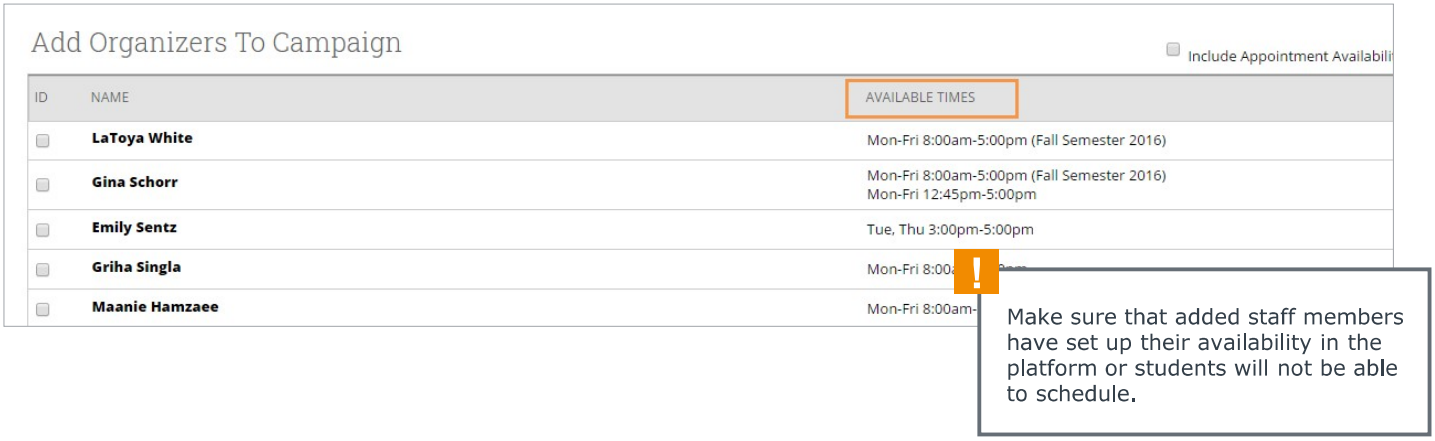


4 Review the invite list and add students to your campaign



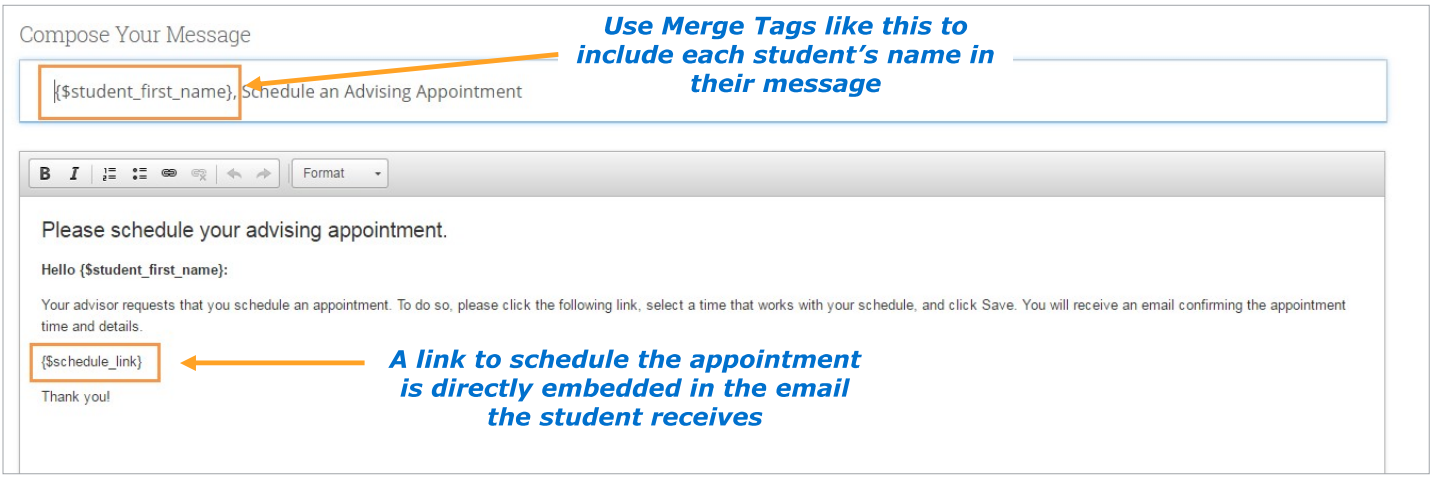
5 Add other staff members to your campaign

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



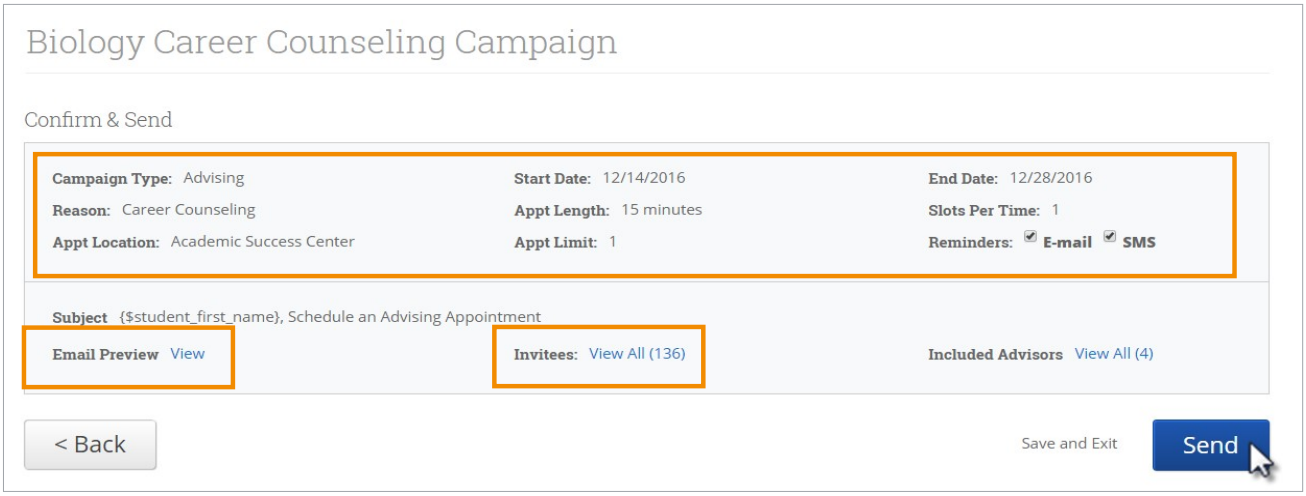
6 Compose the message you want students to receive

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



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 intervention population, and preview the message.



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.