**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

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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 reached out to students **3 to 5** times over a six-week period of the term.

**Example Timeline**

<table>
<thead>
<tr>
<th>Week</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Email #1</td>
</tr>
<tr>
<td>2</td>
<td>Email #2</td>
</tr>
<tr>
<td>3</td>
<td>Phone Call</td>
</tr>
<tr>
<td>3</td>
<td>Advising Sessions</td>
</tr>
<tr>
<td>6</td>
<td>Follow Up Email</td>
</tr>
</tbody>
</table>

**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
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

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:**

<table>
<thead>
<tr>
<th>Method</th>
<th>Timing/ Frequency</th>
<th>Communication Objective and Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Two times, one week apart during the first half of the term</td>
<td>First: notification of undeclared status, encourage to make appointment; second: more urgent encouragement, suggest career center and tutoring center before midterms</td>
</tr>
<tr>
<td>Phone</td>
<td>Once in the week after email #2</td>
<td>Discuss resources, why students should consider declaring, try to schedule an in-person appointment</td>
</tr>
<tr>
<td>Appointment</td>
<td>Once as early in the term as possible</td>
<td>Discuss why you are concerned, and discuss major choice, discuss study habits and time management, plan coursework for next term</td>
</tr>
</tbody>
</table>

**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:**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Target</th>
<th>Actual Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of population contacted</td>
<td>100%</td>
<td></td>
</tr>
<tr>
<td>Number of students that complete in-person advising sessions</td>
<td>31</td>
<td></td>
</tr>
<tr>
<td>Number of students that make appointments with the career center</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Number of students that declare their major by the end of the following term</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>
Campaign Design Worksheet

Define a Focus Population
My focus student population and rationale for why they require this additional attention:

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

Objectives: This appointment campaign will...
1.
2.
3.

Total number of students identified: ____

Plan Your Outreach Strategy
Action Steps These Students Need to Take:

My Communication Plan:

<table>
<thead>
<tr>
<th>Method</th>
<th>Timing/Frequency</th>
<th>Communication Objective and Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

My Follow Up Steps:

Evaluate and Share Success
Metrics and Target Outcomes:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Target</th>
<th>Actual Outcome</th>
</tr>
</thead>
</table>
## Example Student Intervention Campaigns

### Potential Student Populations to Consider for Your Campaigns

<table>
<thead>
<tr>
<th>Campaign</th>
<th>Filters</th>
<th>Intended Action</th>
</tr>
</thead>
</table>
| ✔️ 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 |                                                                                           | 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

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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**

   ![Navigate Campaigns Page]

   **Actions**
   - I want to create a new...
   - Progress Report Campaign
   - Enrollment Census Campaign
   - **Appointment Campaign**
   - Travel Letter

2. **You will be prompted to define the campaign**
   Fill in each field to name and set the parameters and goals of your campaign

   ![Define Campaign]
   - **How many appointments should the student schedule?**
   - **How many students can sign up for a time slot at one time?**
   - **What is the service for the appointment?**

   Several field options are dependent on other selections you make. For example, the Care Unit will produce the options available for Location and Service.
How-To Guide: Appointment Campaigns (CONTINUED)

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

**Step 1:** Select the correct enrollment status and term

**Step 2:** Select your filtering criteria

**Step 3:** Click ‘Search’

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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

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**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

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How-To Guide: Appointment Campaigns (CONTINUED)

4 Review the invite list and add students to your campaign

- Check this box to import all students returned into your campaign roster
- Your applied filters appear here
- You can also use the Actions menu to remove selected students if you would like to exclude them from the 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.

- Make sure that added staff members have set up their availability in the platform or students will not be able to schedule.
How-To Guide: Appointment Campaigns  (CONTINUED)

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.

<table>
<thead>
<tr>
<th>Compose Your Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>$student_first_name. Schedule an Advising Appointment</td>
</tr>
</tbody>
</table>

Use Merge Tags like this to include each student’s name in their message

<table>
<thead>
<tr>
<th>Please schedule your advising appointment.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hello $student_first_name:</td>
</tr>
<tr>
<td>Your advisor requests that you schedule an appointment. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.</td>
</tr>
<tr>
<td>$schedule_link</td>
</tr>
<tr>
<td>Thank you</td>
</tr>
</tbody>
</table>

A link to schedule the appointment is directly embedded in the email the student receives

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.

<table>
<thead>
<tr>
<th>Biology Career Counseling Campaign</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Confirm &amp; Send</strong></td>
</tr>
<tr>
<td><strong>Campaign Type:</strong> Advising</td>
</tr>
<tr>
<td><strong>Reason:</strong> Career Counseling</td>
</tr>
<tr>
<td><strong>Appt Location:</strong> Academic Success Center</td>
</tr>
<tr>
<td><strong>Start Date:</strong> 12/14/2016</td>
</tr>
<tr>
<td><strong>End Date:</strong> 12/28/2016</td>
</tr>
<tr>
<td><strong>Appt Length:</strong> 15 minutes</td>
</tr>
<tr>
<td><strong>Slots Per Time:</strong> 1</td>
</tr>
<tr>
<td><strong>Reminders:</strong> E-mail</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>$student_first_name. Schedule an Advising Appointment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Preview View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invites: View All (136)</td>
</tr>
</tbody>
</table>

Included Advisors View All (4) |

< Back  Save and Exit  Send

8  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.

<table>
<thead>
<tr>
<th>Fall Semester 2016 Campaigns</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Biology Career Counseling Campaign</strong></td>
</tr>
<tr>
<td><strong>ADVISORS:</strong> 12/01/2016 - 01/07/2017</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appts. Made (0%)</td>
</tr>
<tr>
<td>Reports Created (0%)</td>
</tr>
<tr>
<td>Attend. Rate (0%)</td>
</tr>
</tbody>
</table>