

Holistic Advising



Improve day to day efficiencies for your student support network



Create space for strategic & creative student support



Amplify impact & improve scale with multi-touch, coordinated student engagement strategies



HOLISTIC ADVISING

Strategically
organize the day

COLLEGE STATE UNIVERSITY

ADVISE ENGAGE CONNECT REPORT

search students by first/last name, preferred name, or student ID

connect > calendar: calendar view

Calendar

search calendar

Calendar View

List View

Available Appointments

Attendance

My Calendars

- My Advising Calendar
- dawn.jeffries@csu.edu

Add a Calendar

adviser first or last name

Other Calendars

no calendars added

Event Type

< Nov 11 - Nov 17 2018 >

MONTH WEEK DAY TODAY

	SUN 11/11	MON 11/12	TUE 11/13	WED 11/14	THU 11/15	FRI 11/16	SAT 11/17
All Day							
8am			Walk-in Hours	Busy	Schedule Appointment	Busy	
9am					Billy Lewis		
10am		Chris Jones		Walk-in Hours	Randy Ross	Walk-in Hours	
11am		Kat Reeves			Christina Lee		
		Manuel Craig			Allie Smith		
12pm		Taylor Burke				Busy	
1pm		Schedule Appointment	Busy	Busy	Walk-in Hours		
2pm			Megan Schneider	Schedule Appointment		Schedule Appointment	







 **Chris Jones**

-  VIEW STUDENT SUMMARY
-  MESSAGE
-  ADD TO GROUP(S)
-  SCHEDULE APPOINTMENT

- Profile
- Engagement Opportunities
- Advising Notes
- Alerts**
- Messages
- Events
- Courses
- Library

Alerts (2) [+ NEW ALERT](#) [EXCEL](#)

<input type="checkbox"/>	★	COURSE	TERM	TYPE	AUTHOR	LEVEL	RESOLVED	DATE
<input type="checkbox"/>	★	BUS 300	FALL 2018	Mid-Term	James Castillo		--	Oct 30, 2018
		<p>Concerns</p> <p>You have one or more low test grades</p> <p>You have class absences</p> <p>You seem unprepared for class</p>	<p>Recommendation(s) for student</p> <p>Meet with me during my office hours</p> <p>Meet with an academic advisor</p> <p>Focus on preparing for tests</p> <p>Make class attendance a priority</p>		<p>Request(s) for advisors</p> <p>Meet with the student</p> <p>Talk to the student about any academic challenges</p>			
		<p>Comment</p> <p>Chris is barely making passing grades in this course. He has also missed a few crucial classes. There is a concern whether this course is too advanced for him at this point and whether he should consider dropping now to not affect his GPA and possibly retake another term.</p> <p> RESOLVE</p>						
<input type="checkbox"/>	★	CHEM 201	FALL 2018	Four Week	Lisa Craft			Sept 19, 2018

HOLISTIC ADVISING

Maximize student interactions with relevant context and minimal ramp time



HOLISTIC ADVISING

Capture information and close the loop with faculty and across the student support network

The screenshot displays the 'Alerts' section of a web application for College State University. The header includes the university logo, 'COLLEGE STATE UNIVERSITY', and navigation links for 'TASKS', 'CONNECT', and a user profile icon. The main content area is titled 'Alerts' and features a sidebar with filters and a main table of alerts.

Alerts


Fall 2018 Courses

Current Academic Year Alerts

Filters

- Terms
 - All
 - Fall 2018
 - Spring 2019
 - Summer 2019
- Alert Type
 - All
 - Four Week
 - Mid-term
 - General
- Alert Level
 - All
 - High Alert
 - Medium Alert
 - Commendation
- Alert Status
 - All

Current Academic Year Alerts (24) [+ NEW ALERT](#)

STUDENT	COURSE	TERM	TYPE	LEVEL	RESOLVED	DATE UPDATED
Chris Jones	BUS 300	Fall 2018	Mid-Term	▲ high	✔ resolved	Nov 12, 2018
 Chris Jones Fall 2018 - Spring 2020 Business Administration	Concerns You have one or more low test grades You have class absences You seem unprepared for class	Recommendation(s) for student Meet with me during my office hours Meet with an academic advisor Focus on preparing for tests Make class attendance a priority	Request(s) for advisors Meet with the student Talk to the student about any academic challenges	Date Resolved Nov 12, 2018 Resolution Comment Met with Chris today and we set up a regular schedule for him in the tutoring center to get more help in his accounting classes before his next test. Resolved by Dawn Jeffries		
Rosie Jenkins	BUS 300	Fall 2018	Mid-Term	▲ high	--	Nov 8, 2018



HOLISTIC ADVISING

Coordinate cross-functional engagement around broader strategies

The screenshot displays the 'Advising Management' interface for College State University. The top navigation bar includes 'ADVISE', 'ENGAGE', 'CONNECT', and 'REPORT'. A search bar at the top allows searching for students by name or ID. The main content area is titled 'Advising Management' and features a 'Custom Groups (5)' table. The table lists five groups with columns for 'GROUP NAME', 'GROUP TYPE', 'LAST UPDATED', and 'NUMBER OF STUDENTS'. A sidebar on the left contains navigation options like 'Students', 'Advising Notes', 'Alerts', and 'Groups', along with a 'Filters' section for 'Student Group Type' with checkboxes for 'All', 'Favorites', 'Dynamic', and 'Static'. Action buttons for 'CREATE GROUP', 'DELETE', 'refresh', 'download', and 'email' are located above the table.









GROUP NAME	GROUP TYPE	LAST UPDATED	NUMBER OF STUDENTS
<input type="checkbox"/> ★ Unenrolled students for next term	Dynamic	May 2, 2018	94
<input type="checkbox"/> ★ My priority students	Static	Sept 5, 2018	32
<input type="checkbox"/> ★ Women in STEM Majors	Dynamic	Oct 1, 2018	54
<input type="checkbox"/> ★ Scholarship program students	Static	Sept 6, 2018	23
<input type="checkbox"/> ★ Freshman Learning Communities	Dynamic	May 8, 2018	88



COLLEGE STATE UNIVERSITY

ADVISE ENGAGE CONNECT REPORT

Filter by Persistence Prediction Very Low Low Moderate High Very High

 <p>Sam Tucker Business Administration</p> <p>4 Very Low ENGAGEMENT OPPORTUNITIES PERSISTENCE PREDICTION</p> <p>Students with a GPA of 2.0 or higher who are less likely to persist</p> <p>Students with alerts from multiple faculty or staff</p> <p>Early career students who have withdrawn from a course</p> <p>New transfer students who have not met with their advisor</p>	 <p>Tyler King Economics</p> <p>4 Very Low ENGAGEMENT OPPORTUNITIES PERSISTENCE PREDICTION</p> <p>Students with a GPA of 2.0 or higher who are less likely to persist</p> <p>Students with alerts from multiple faculty or staff</p> <p>Early career students who have withdrawn from a course</p> <p>First time in college students who have not met with their advisor</p>	 <p>Chris Jones Business Administration</p> <p>3 Low ENGAGEMENT OPPORTUNITIES PERSISTENCE PREDICTION</p> <p>Students with a GPA of 2.0 or higher who are less likely to persist</p> <p>Students with alerts from multiple faculty or staff</p> <p>New transfer students who have not met with their advisor</p>	 <p>Seth Nguyen Undeclared</p> <p>3 Low ENGAGEMENT OPPORTUNITIES PERSISTENCE PREDICTION</p> <p>Students with alerts from multiple faculty or staff</p> <p>Early career students who have withdrawn from a course</p> <p>First time in college students who have not met with their advisor</p>
 <p>Mattie Cook Psychology</p>	 <p>Amy James Nursing</p>	 <p>Wesley Ortega Physics</p> <p>2 Moderate ENGAGEMENT OPPORTUNITIES PERSISTENCE PREDICTION</p>	 <p>Caleb Wilson Business Administration</p> <p>1 Moderate ENGAGEMENT OPPORTUNITY PERSISTENCE PREDICTION</p>

HOLISTIC ADVISING

Align your most valuable people resources to the students most in need



search students by first/last name, preferred name, or student ID

← First time in college students who have not met with their advisor

These are students entering their first term in college who have not scheduled an appointment or met with an advisor before the start of their first term. It could be an opportunity to discuss their academic goals and plan.

Filter		Students (48) EXCEL MAIL				
<input checked="" type="radio"/> All Students (48) <input type="radio"/> My Assigned Students (27)		NAME	PERSISTENCE PREDICTION	MAJOR(S)	LAST OUTREACH	ADDRESSED?
<input checked="" type="checkbox"/> Active Students (48) <input type="checkbox"/> Inactive Students (0)		<input type="checkbox"/> Diana Alvarez	Moderate	Education	Jun 13, 2017 - Message	No
Persistence Prediction <input type="checkbox"/> Very Low (23) <input type="checkbox"/> Low (18) <input type="checkbox"/> Moderate (7) <input type="checkbox"/> High (0) <input type="checkbox"/> Very High (0)		<input type="checkbox"/> Becca Anderson	Very Low	Accounting	Apr 30, 2018 - Message	Yes
<input checked="" type="checkbox"/> Addressed <input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No		<input type="checkbox"/> Danielle Azul	Very Low	Biology	--	No
Add/Remove Columns		<input type="checkbox"/> Daniel Baldwin	Low	Chemistry	Feb 20, 2018 - Appt	Yes
		<input type="checkbox"/> Andrea Barnett	Low	Finance	Mar 30, 2017 - Message	No
		<input type="checkbox"/> Emily Beck	Very Low	Accounting	Jun 13, 2018 - Message	No
		<input type="checkbox"/> Joel Buckner	Very Low	Accounting	--	No

HOLISTIC ADVISING

Turn slower periods into the highest value time with proactive student engagement



search students by first/last name, preferred name, or student ID

report > report center: create report

Reports Center

Create Report

Saved Report Templates

Appointments Custom Report

START OVER

CLEAR

RUN REPORT

All Appointments

My Appointments

Select student groups*

Full-Time First Time Students x

Start Date

End Date

01-01-2018

07-10-2019

all data

Appointment Details

The following data is included in your report:

✓ Start Date/Time

✓ End Date/Time

✓ Location

Advisor

All advisors College of Social Science x

Appointment Type

In Person x

Session Topic(s)

Course Selection x Enrolling in Class x

Display on Student Calendar

display on student calendar

HOLISTIC ADVISING

Monitor activities aligned to students' needs & success strategies





Chris Jones

- VIEW STUDENT SUMMARY
- MESSAGE
- ADD TO GROUP(S)
- SCHEDULE APPOINTMENT

- Profile
- Engagement Opportunities
- Advising Notes
- Alerts
- Messages**
- Events
- Courses
- Library

Messages (4)

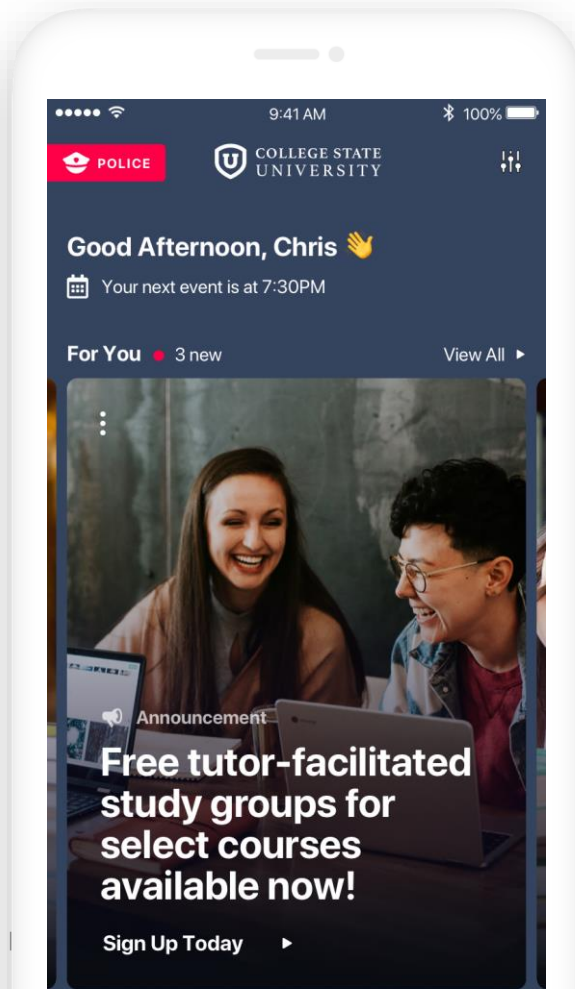
COMPOSE DELETE

<input type="checkbox"/>	SUBJECT	DATE	SENT FROM
<input type="checkbox"/>	★ Know which classes you're taking?	Apr 12, 2019	Illume on behalf of Advisors
	Dawn Jeffries to Chris Jones	Dear Chris, The end of the Spring term is a busy time! Everyone feels stressed out and overwhelmed with getting through finals and deciding what classes to take next Fall. Remember that you are closer to your goal of getting a college degree than you ever have been. So hang in there and don't give up! I want to see you back here next Fall. We have course previews on the Department Websites you can check out and watch registration how-to videos on our Youtube channel. If you have any questions, I'm always available to assist you! Feel free to email me or schedule some time with me. Dawn Jeffries Nudge Context : This nudge was the first nudge for the Re-enrollemt campaign late term to urge students that have not enrolled and have low, medium and high risk.	Apr 12, 2019
<input type="checkbox"/>	★ Our upcoming appt	Nov 9, 2018	Messages
<input type="checkbox"/>	★ Fall Midterms	Oct 1, 2018	Messages
<input type="checkbox"/>	★ Transfer forms	Sept 30, 2018	Messages
<input type="checkbox"/>	★ Welcome to CSU!	Aug 11, 2018	Messages

HOLISTIC ADVISING

Free up advising staff capacity with centralized student success communications





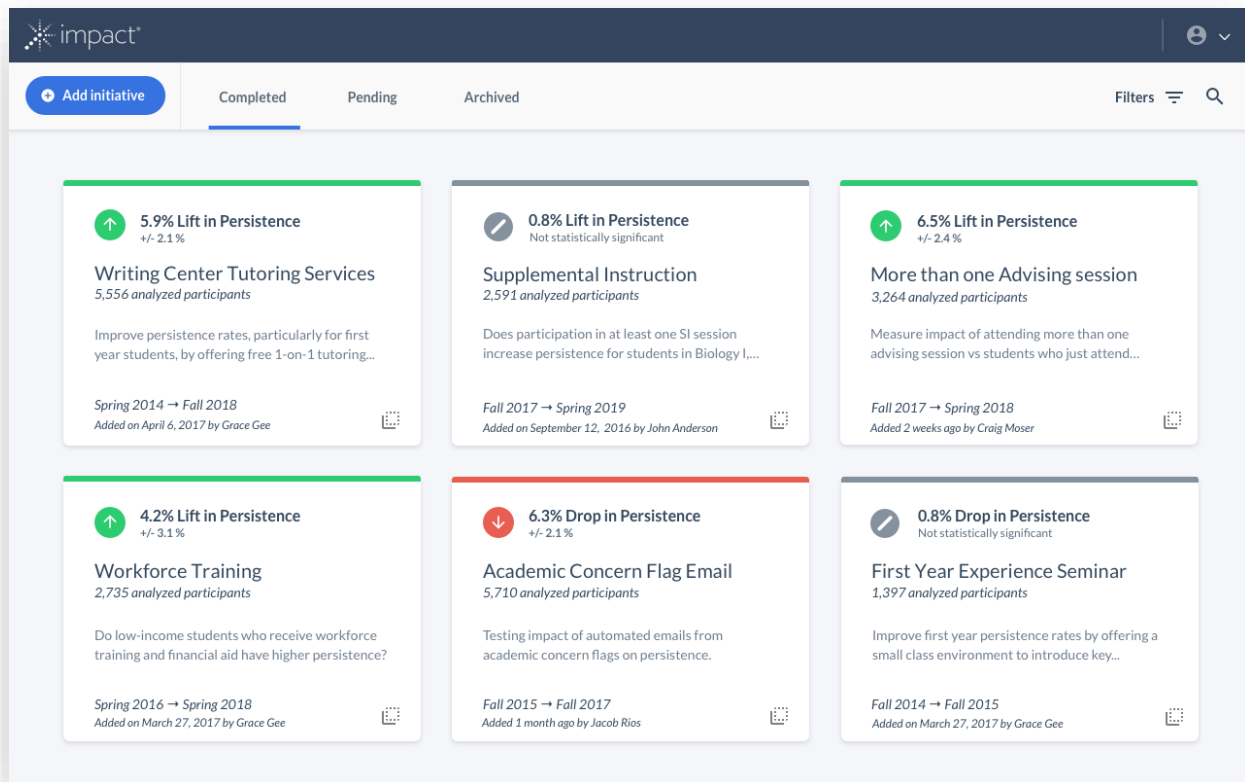
HOLISTIC ADVISING

Amplify student engagement & increase program utilization with multi-touch strategies



HOLISTIC ADVISING

Evaluate the impact of coordinated initiatives and action plans



Holistic Advising with Civitas Learning

- Provide infrastructure and intuitive workflow tools to connect stakeholders with to complete tasks and share information
- Use a sophisticated intelligence platform to surface insights around which students need help and factors influencing success
- Surface prescriptive, actionable insight to increase positive effect of advising through focus on the important and “changeable” things
- Report and monitor activity consistently so you can manage and coordinate around specific student groups

