



EAB

Coordinated Outreach Calendar

Maturity Curve Best Practice
Scale Actions and Differentiate Care



Best Practice Overview

Coordinated Outreach Calendar



Key Terminology: Communication and Intervention Calendar

Fundamental Components

SEPTEMBER						
mo	tu	we	th	fr	sa	su
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

- A **structured plan** outlining the standard level of care every student should receive to help students persist and graduate.
- This plan typically involves multiple stakeholders, departments, or Care Units **working together to address a particular issue or pursue a common goal.**

Primary Actions Coordinated Through the Calendar



Communications

A purposeful exchange of information through various channels such as email, SMS, or phone calls



Interventions

A targeted strategy or action designed to support and enhance a student's academic and personal development



Coordinated Outreach Strategy



Navigate360 Best Practice

- Pre-plan communication alongside the flow of the academic year
- Embrace proactive, just-in-time messaging to nudge students when needed
- Collaborate with corresponding units and teams to:
 - avoid repetition
 - ensure consistency of messaging
- Account for staff time and capacity while scaling for efficiency and impact

Sample Reenrollment Outreach Planning





Coordinated Outreach Strategy

Why? Allows for a proactive, efficient, and coordinated communication to students

Score	Maturity Standard
0	<ul style="list-style-type: none"> Minimal to no utilization
1	<ul style="list-style-type: none"> At minimum once every month outreach calendar of activities exists for at least 1 advising department on campus
2	<ul style="list-style-type: none"> At minimum, every other week outreach calendar of activities exist with the full advising service area on campus
3	<ul style="list-style-type: none"> A week by week outreach calendar exists with your full advising service area on campus Includes example communication templates and monitoring is in place for completion of outreach and its impact Other service areas (as appropriate leveraging messaging campaigns & coordinated outreach Tailored messaging campaign set-up to help staff more efficiently manage communications (rather than manual); audited every term

Key Navigate Features

- [Student Lists](#)
- [Advanced Search](#)
- [Messaging Campaign](#)
- [Workflow automation](#)
- [V3 Reports](#)

Key Terminology: Communication and Intervention Calendar





4 Leading Elements an Institution Should Consider When Conceptualizing Their Plan

1 Project Team

Who from across campus will lead the effort to define, build, execute, evaluate, and communicate impact of the calendar?

Recommendation: No more than 5 individuals as part of the core team




Examples:

-  Project Manager
-  Navigate360 or Starfish Functionality Expert
-  Coordinator/Calendar Drafter
-  Student Representative

2 Timeline



How long should you plan out communications and interventions?

Recommendation: Start with a shorter time frame and expand after experiencing and evaluating the process


-  New Student Onboarding
-  Fall/Spring Semester
-  Academic Year 202X-2Y



3 Outcome Goals and Target Population

What do you want to achieve through coordinating efforts? What population of your students do you want to impact?

-  First-Year Persistence/FTFT Students
-  Overall Retention/All Undergraduate Students

4 Metrics and Evaluation

What do you want to measure once you've completed your calendar (**A+** outcome metric) or along the way to ensure the calendar is working properly ( process metric)?

- A+** First-Year Persistence/Overall Retention
-  % of Students Engaging in Interventions
-  % of Students Who Register During Priority Registration

But Why Does This Matter?



Defining Standard Care Allows You to Deliver on the True Meaning of
Coordinated Care

Reasons to create a calendar



Improve Students' Experience on Your Campus

- Reduce the number of messages a student receives
- Improve the usage and mix of channels where information is shared
- Reduce misinformation due to siloed decision-making



Maximize Faculty and Staff's Valuable Time

- Identify redundant messages so staff are not sending identical messages
- Find opportunities to automate communications or interventions



Set Yourself Up to Easily Understand Impact

- Define and execute clear intervention and communication processes to allow yourself to also plan for evaluation

Providing Intentional and Purposeful Support to Students



Delivering on the promise of Coordinated Care

Broad-Based Strategies



Establishing a **standard level of care** ensures the delivery of need-to-haves



Emphasis on **at-scale communication and intervention** mitigates student inundation

Targeted Strategies



Development of **differentiated care** programming must incorporate or effectively replace standard care



Intentional focus on **priority-population initiatives** enhances the impact where most meaningful

Intentionally Organizing Your Outreach & Interventions

Inspiration from Florida International University

STUDENT SUCCESS ROADMAP

Progress report, attendance,
and mid-semester grades reminder

W1

W2

Drop for non-payment outreach

Graduation
Eligibility Project

W3

Retention cohort Fall B
enrollment push

W4

Preliminary Degree Check (PDC)
Advising Appointment Campaign

W5

B term low enrolled review

W6

B Term Begins

W10

B Term drop for
non-payment outreach

W9

Registration hold outreach

W8

Freshmen Advising
Appointment Campaign

W7

W11

Registration opens for
upcoming term(s)

Re-enrollment outreach
part one

W13

Registration hold outreach

W14

Re-enrollment outreach
part two

W15

Finals

Course offerings planning
reports for key-in

W12

Course offerings monitoring
reports for upcoming term

W14

W15

Between semesters:

- Review 4-year graduation cohort
- Retention cohort Coaching Campaign
- Targeted population(s) Coaching Campaign
- Low enrolled review

FIU FLORIDA
INTERNATIONAL
UNIVERSITY

● Highlights

1. Week-by-week staff-facing structure allows for clear and progressive areas of focus across a standard academic term
2. Potential to repurpose this calendar for multiple audiences (students, parents)

Intentionally Organizing Your Outreach & Interventions



Inspiration from Cal Poly Pomona

CPP CONNECT

Academic Advising Annual

Overview:
A campaign in CPP Connect enables advisors to population in need of intervention. After identity communication to these specific students, these students can then schedule an appointment advisor's pre-set availability.

Goals:
By proactively focusing on target student population maximize the impact of their advising efforts to that every student in need of advising support.

Implementation Plan:
The University Advising team will collaborate with the Early Support team to design and implement. This multi-level campaign strategy ensure customized and targeted support.

- Types of Campaigns**
- Re-enrollment Campaigns
 - Focused on enrollment and completion
 - Facilitated by the University Adv
 - Academic Standing Campaigns
 - Focused on retention and getting
 - Facilitated by the Retention & G
 - Graduation Initiative 2025 Campaigns
 - Focused on graduation rates for
 - Facilitated by the Retention & G
 - Degree Progress Campaigns
 - Focused on persistence towards support level, and graduation (N)
 - Facilitated by College Advising C
 - Early Support Campaigns
 - Focused on students in need of a
 - Facilitated by Early Support Spe

Academic Advising Campaign Example

University Advising		
Name of Campaign (What)	Description and Purpose of Campaign (Why)	Dates for Campaign (When)
Re-enrollment for Fall 2022 Campaign	Improve retention by identifying students who enrolled in Spring 2022 or Summer 2022 but have not registered for the upcoming term, Fall 2022, to promote retention and prevent stop-out or disenrollment.	Sent By: August 2022 (Fall 2022 Add/Enp Period Begins)

Retention and Graduation Special

Name of Campaign (What)	Description and Purpose of Campaign (Why)	Dates for Campaign (When)	Method of Campaign (How)
Probation with Contract Campaign	Proactively engage students in academic difficulty by identifying students based on academic standing tool.	Fall 2022 and Spring 2023	Appointment Campaign
Naming Conversion Example: EMV Probation with Contract Fall 2022	Launch immediately after academic standing runs and keep open as needed.		

College Advising Centers/Student Success

Name of Campaign (What)	Description and Purpose of Campaign (Why)	Dates for Campaign (When)	Method of Campaign (How)
Senior Grad Check (Seniors)	Reach out to students who have completed 90 units or more to provide a graduation check, review, and confirm all degree requirements will be met.	Fall 2022 and Spring 2023	Appointment Campaign
Naming Conversion Example: EGR Senior Graduation Check Spring 2023			

Early Support Team

Name of Campaign (What)	Description and Purpose of Campaign (Why)	Dates for Campaign (When)	Method of Campaign (How)	Desired Outcomes (Goals)
High GPA Campaign	The Early Support intervention specialists will analyze final grade trends and data to identify students with 2+ SFWG grades to provide immediate intervention session.	Sent By: August 2022 (Fall 2022 Add/Enp Period Begins)	CPP Connect's Appointment Campaign	Meet with at least 10% of these students and create a plan for next term.
Naming Conversion Example: GSI High GPA Fall 2022		Sent By: January 2023 (Spring 2023 Add/Enp Period Begins)		

Academic Advising Campaign Calendar and Timeline

Fall 2022

July	August	September	October	November	December
No Enrollment	No Enrollment				
Staying on Track	Staying on Track	Pre-grad Check	Pre-grad Check	Senior Grad Check	Senior Grad Check
Senior Grad Check	Senior Grad Check	Senior Grad Check	Senior Grad Check	Senior Grad Check	Senior Grad Check
Probation	Probation	Probation	Probation	Probation	Probation
PAAC	PAAC	PAAC	PAAC	PAAC	PAAC
High GPA	High GPA	High GPA	High GPA	High GPA	High GPA

Spring 2023

January	February	March	April	May	June
No Enrollment	Staying on Track	Staying on Track			
Staying on Track	Staying on Track	Pre-grad Check	Pre-grad Check	Senior Grad Check	Senior Grad Check
Senior Grad Check	Senior Grad Check	Senior Grad Check	Senior Grad Check	Senior Grad Check	Senior Grad Check
Low P/Fs	Low P/Fs	Low P/Fs	Low P/Fs	Low P/Fs	Low P/Fs
High P/Fs	High P/Fs	High P/Fs	High P/Fs	High P/Fs	High P/Fs
Probation	Probation	Probation	Probation	Probation	Probation
PAAC	PAAC	PAAC	PAAC	PAAC	PAAC
High GPA	High GPA	High GPA	High GPA	High GPA	High GPA

Highlights

1. First page provides key terms and overview, especially helpful for new staff
2. Specific Desired Outcomes set clear metrics
3. Third page "pulls it all together"



CalPolyPomona

Source: EAB interviews and analysis

Campaign Types in Navigate360

Robust CRM Functionality to Align the Right Support at the Right Time

Student Campaigns



Appointment Campaign

Invite students for appointments to guide advising and support service



Messaging Campaign

Drip campaign to share information about and nudge on key actions or dates



Enrollment Campaign

Drip campaign to encourage and nudge students to reenroll in a particular term

Staff Campaigns



Progress Report Campaign

Mechanism to identify potential barriers to student success through instructor feedback



Enrollment Census Campaign

Mechanism to monitor student attendance









Travel Letter Campaign

Mechanism to share with faculty students who will miss class due to university events

Automated Enrollment Reminders

Example from Benedictine College

NAME	STUDENTS	STATS
 24Fall-0+hours 04/11/2024 - 05/07/2024	448	Enrolled Rate 94% 
 24Fall-30+hours 04/10/2024 - 05/07/2024	280	Enrolled Rate 95% 
 24Fall - 50+Hours 04/09/2024 - 05/07/2024	305	Enrolled Rate 96% 
 24Fall-70+Hours 04/08/2024 - 05/07/2024	311	Enrolled Rate 98% 
 24Fall-90Hours 04/07/2024 - 05/07/2024	351	Enrolled Rate 95% 

1

Starts By Segmenting
Population Based On
Priority Registration

3

Impressive Outcomes
Help Focus Outreach
Where It's Most
Meaningful

Prior To Registration

1. Advisors meet with students to help plan courses & socialize registration dates
2. **[NEW]** "Remove Your Hold" Messaging Campaign sent proactively to guide students before they try to register and run into a roadblock

2

Step 1	Day Before Registration – Reminder Email <ul style="list-style-type: none">• All students in that specific campaign
Step 2	Registration Day – Reminder Text Message <ul style="list-style-type: none">• All students in that specific campaign
Step 3	Registration Day + 4 – "Did You Forget To Register?" Email <ul style="list-style-type: none">• Only students who have not registered
Step 4	Registration Success Message <ul style="list-style-type: none">• Sent to students once they've registered with reminders about ensuring they've enrolled in at least 12 credit hours



Automate Common and Routine Workflows

Newer Features to Alleviate Pressure on Staff Time



Leading Automations Today

- Advisor Intro When Students Change Caseloads
- Intake Survey Follow-Up
- Concerning Appointment Satisfaction Ratings
- Enrollment Census "Never Attended" Flags
- Student Hasn't Logged Into LMS Within X Days
- Additional Instructions For How To Prepare For Specific Meetings & Interactions



Exploring Limited Use

Coordinated Outreach Calendar

MATURITY STANDARD LEVEL

1

Planning and Standardizing Outreach

- Are students already receiving proactive and just-in-time messaging from this advising team?
- Are messages sent to all students clear, important, and general enough to meet needs across the caseload?





Common Advising Communication

Getting Started In Mapping the Semester

Weeks 1-5

- > **Start of the Term**
 - First day of classes well wishes and reminders
 - Add/drop deadlines

- > **Early Alert Considerations**
 - Academic support resources and nudges
 - Outreach and referrals

Weeks 6-10

- > **Midterms**
 - Study tips and words of encouragement
 - Midterm grade outreach

- > **Next Term Registration**
 - Recommended courses and considerations
 - Communication of key dates and required next steps

Weeks 11-15

- > **Course Withdrawal Deadlines**
 - Required advising appointments
 - Impact on next term, degree progress, financial aid

- > **End-of-Term**
 - Finals week encouragement and reminders
 - Preparation for next term

Getting Started



General Timing	Campaign Sender?	Purpose	Type of Campaign	Campaign Students	Action or Intervention	Tracking Mechanism
Example						
1 Week Prior To Classes Starting	Advisors with First Year and Transfer Students	New Student Welcome Email	Proactive (Email)	New First Year / Transfer Students	Introductory Email With University Resources	N/A
Week 4	Director of Student Success	Week 4 Progress Reports	Proactive (PR Campaign)	All First Year and all STEM Students	Collect feedback from faculty on student progress in courses and intervene based on feedback submitted	Faculty feedback % & student response rates to outreach
Week 9-11	Advisors	Registration Campaigns	Proactive (Appointment Campaign)	All Advisees	Meet with advisees to check in on term progress & plan for the spring	# of students with an appointment & % of students registering in a timely manner
Your Care Unit Outreach Efforts						



Exploring Expanded Use

Coordinated Outreach Calendar

MATURITY STANDARD LEVEL

2

Coordinated Outreach at Scale

- Are all students receiving the same level of outreach in alignment with key deadlines and activities?
- What can we do to help advisors across units consistently scale their outreach?
- Are students receiving both ***essential*** and ***encouraged*** communication from their entire student success team?





Expanding Advising Communication

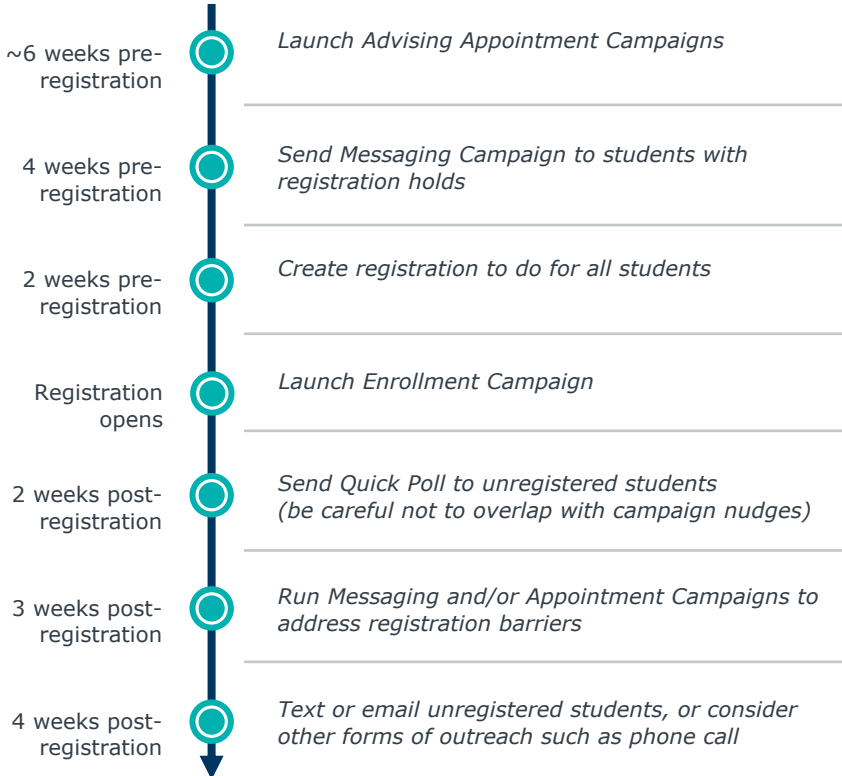
Sample Fall Outreach Calendar for Advising

Timeline	Navigate Initiative and Process	Champion	Outcome
August Weeks 1 & 2	Recruit Back Efforts Campaign to all students not registered	School/Dept Coordinator	Student gets registered for next semester
August Weeks 3 & 4	New Student Early Check-In Campaign to all new students (all newly enrolled transfers)	School/Dept Coordinator or Faculty Advisor	Student is introduced to faculty advisor with contact information
August Weeks 3 & 4	New Student Early Check-In Campaign to all new students (new advisees with 24+ hours)	School/Dept Coordinator or Faculty Advisor	Student is introduced to faculty advisor with contact information
September Weeks 2 & 3	Murky Middle Intervention Campaign to all students with GPA range 2.0-3.0	Faculty Advisor	Student meets with faculty advisor to determine barrier and refer for appropriate intervention
October Weeks 1 & 2	Advising Appointments Campaign to all students in school/dept	Faculty Advisor	Student meets with faculty advisor to plan for next semester(s)
October Weeks 3 & 4	Missed Success Marker Intervention Campaign to all students in school/dept with missed markers	Faculty Advisor	Student meets with faculty advisor to ensure on track to timely degree completion
November Weeks 1 & 2	Registration Reminder Communication via email and text to all students in department	School/Dept Coordinator	Students not yet registered take steps to register for next semester
December Weeks 2 & 3	Recruit Back Efforts Campaign to all students not registered	School/Dept Coordinator	Student gets registered for next semester



Goal Specific Advising Communication

Sample Reenrollment Campaign Outreach



Aligning with Student Needs and Strategic Priorities

Consider utility for:

- Major Declaration
- Academic Standing Appeals
- Satisfactory Academic Progress Appeals
- Leave of Absence Follow Up
- Athletic Eligibility and Requirements



Exploring Strategic Use

Coordinated Outreach Calendar

MATURITY STANDARD LEVEL

3

Enhancing and Expanding Coordination and Messaging

- What tips do you have to help other advisors and student success team members scale communication?
- What gets the **best response** from your students?
- What does NOT get a good response?



Breaking Through the Student Communications Barrier



Frontline Staff Sending Lengthy, Formal Emails...



...to Students Accustomed to Captions

Information Regarding Your Academic Progress

Dear Laura:

University policy requires that all students declare a major prior to completing 60 units. Records indicate that you are currently undeclared and have completed at least 45 credits. Records also indicate that your GPA is below a 2.5, which is the minimum required threshold for many majors at the University.

There are many resources here at the University that can help you in selecting your major and improving your GPA. There is still time to adjust your skills and work to make some necessary improvements. A success coach can help you set goals and develop skills necessary to achieve success. With the help of the success coach, you can work on a variety of topics such as study skills, organizational techniques, and time management, among many other items. Additionally the career center on campus is staffed with career counselors who can administer an interest inventory and help you explore the connection between careers and majors. I hope you will reach out to one of these offices to support your progress.

Sincerely,

Jerome Smith
Office of Student Success

(202) 555.5555

Frontline Staff Sending Lengthy, Formal Emails...

...to Students Accustomed to Tweets

Subject line
too vague

Information Regarding Your Academic Progress

Dear Laura: *Impersonal*

University policy requires that all students declare a major prior to completing 60 units. Records indicate that you are currently undeclared and have completed at least 45 credits. Records also indicate that your GPA is below a 2.5, which is the minimum required threshold for many majors at the University.

Greeting
and closing
too formal

There are many resources here at the University that can help you in selecting your major and improving your GPA. There is still time to adjust your skills and work to make some necessary improvements. A success coach can help you set goals and develop skills necessary to achieve success. With the help of the success coach, you can work on a variety of topics such as study skills, organizational techniques, and time management, among many other items. Additionally the career center on campus is staffed with career counselors who can administer an interest inventory and help you explore the connection between careers and majors. I hope you will reach out to one of these offices to support your progress.

Does the
student know
this office?

Sincerely,
John Smith
Office of Student Success
(202) 555.5555

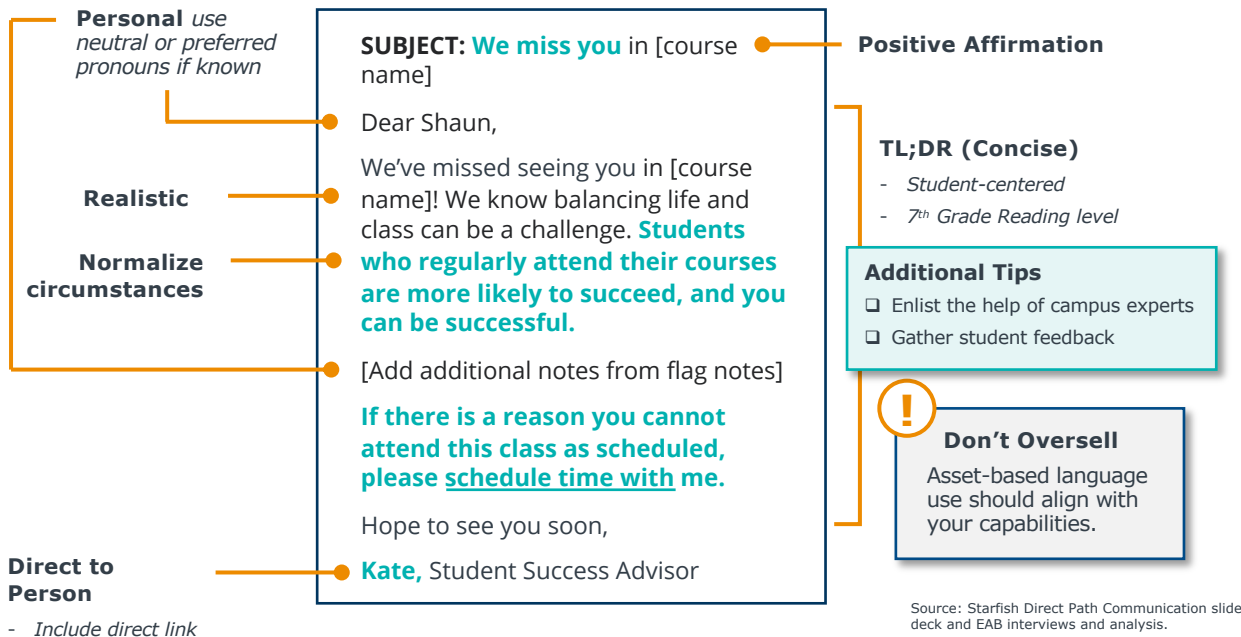
Next steps and
timeline not clear

Jargon
Extraneous
information

This paragraph
too long. What
is the important
info?

F

Anatomy of an Asset-Based Email



How to Approach Student Communications



Balance Marketing Techniques with Student-Centric Values



Make Them Remember You

We live in a complicated and noisy world, and we don't get the chance for our audience to remember much about us, so we have to stand out and be really clear about what we want them to know.

Be Authentic

Students will see through inauthenticity. Building trust and respecting their communications boundaries is especially crucial in the education world. Appeal to what is important to them!

Write for Your Audience

Effective Messages Are Student-Centered and Student-Friendly

Tone Should Focus on Students and Their Goals, Not Rules or Policies

Impersonal Copy

"Whitehouse University cares about your success and offers a number of resources for students in need of additional support. Students have found the tutoring center to be critical in improving their GPA for admission into certain selective programs."

Student-Centered Copy

"I care about your success and noticed that your math midterm grade is not up to standards for the Business School, which you want to apply for next semester. You should schedule an appointment with the tutoring center."

50% Increase in response rate
(Royall recruitment campaign)

Language Should Be Clear to All Students (Including ESL)

▶ Reduce multisyllabic words

"Exempted" → "Do not need to"

▶ Remove passive voice

"If you are contacted by your advisor" → "If your advisor contacts you"

▶ Translate jargon

"Non-credit-bearing" → "Does not count for credit"

▶ Ensure readability

The Gunning Fog Index is an online tool to assess the grade-level of a given text



Tool: "Higher Ed Jargon Reduction Exercise" on eab.com

Don't Ignore Your Call to Action (CTA)

The Call to Action Is Critical, but Often the Hardest Part to Get Right

Out-of-Industry Best Practices

Include Only One CTA When Possible

42%



increase in clicks when the number of CTAs are reduced from 4 to 1

Make Your CTA Stand Out

Register Now

Offset CTAs with bold, different colored text, or buttons



Lead with a CTA in the Subject Line



Include the CTA in the subject line so students immediately know what they need to do

Convey a Sense of Urgency



Use action verbs that convey a sense of urgency, such as "sign up," "schedule," or "pay"



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