



BAY ADVISOR BULLETIN

YOUR SOURCE FOR ALL THINGS BAY ADVISOR

THANK YOU

The history of the term *thank you* is an interesting one. In English the term has been derived from the word “think” as in *I will remember what you did for me*. In many Latin cultures, *merci* (French) or *obrigado* (Portuguese) for example derive from *I am in your debt*, which has led to phrases in other Latin cultures such as *de nada* (Spanish) or *de rein* (French) to signify *it’s nothing* in response as opposed to you’re welcome in English, which has its own history.

This year has been a trying one on many levels and in many different ways for all of us. I, in as many forms as possible through as many cultures and ways as possible, want to say **thank you**, I will remember what you have done for our students, our university and our community and I am in your debt for all that you have done over this past year.

As we head into summer, please take some time for yourself. As we start to look at what our “new normal” will be, please continue to provide grace to yourselves and to those around you too. As we have seen, and have felt, we are one community working in concert to better the lives of the students at East Bay.

Be well, find the good in every moment you can, and thank you for all you have done for our campus and community.



Schedule an Appointment

^^^ The new look of Bay Advisor Student Scheduler

New Appointment

What can we help you find?

*What type of appointment would you like to schedule?

*Service

Pick a Date

Tuesday, May 11th 2021

Find Available Time

New Student Scheduler & PAL's

Out with the old and in with the new! EAB has been on a tear updating and evolving the Navigate/Bay Advisor platform this past year. Some of these updates have not gone smoothly like the new Dashboard feature which was loaded into our site and then broke and was taken down all within 2 days. The dashboard feature provides those advisors with assigned students a snapshot of where their students sit. It helps advisors know if their assigned students are enrolled in the next term, what appointments or other activity they have had recently in Bay Advisor, any outstanding appointment summaries pending for your students and a snapshot of any appointment campaign data. All useful tools that will assist you, the advisor, with your caseload and outreach. But in true EAB fashion, they rushed the release, and it broke... These useful dashboards will be back, but not sure when. The next update coming this summer has been in the works for about a year. EAB has taken their time with this feature. It is focused more on improving the student experience in the scheduling of appointments. Currently students navigate through a series of drop-down menus to get to where they want and with whom they want to schedule an appointment with. There are five different drop down's to select options from and they can potentially direct the student to dead ends, and scheduling errors. Not an ideal experience for our students.

This new scheduler takes all of that away and the student selects from two options; what type of appointment (Advising, Tutoring or HOPE services) and then picks the directed service, such as History Academic Advising, or AACE Career Counseling. Students will also have the option to select someone directly from their listed assigned success team and schedule directly with them, cutting out the menu and options. Also, and most excitingly, advisors will have the ability to produce a “Personal Advising Link” (PAL) through their availability tab that can be sent to students or even added to the bottom of an email signature where students can click on the link and be taken directly through the scheduling matrix to your posted availability.

The PAL's will only work if your availability and location are open for student facing scheduling and can be filtered at that level for specific student populations as well, just like before. Also, the PAL's will work from mobile devices, so students can potentially make appointments with their phones rather than having to log on with a “real” computer. This will be a game changer for students in finding their assigned advisors and services they need on the platform. There are some edits we will have to make on the back end to accommodate this update, so please look out for emails from Bill. The update will take place in the beginning of July.

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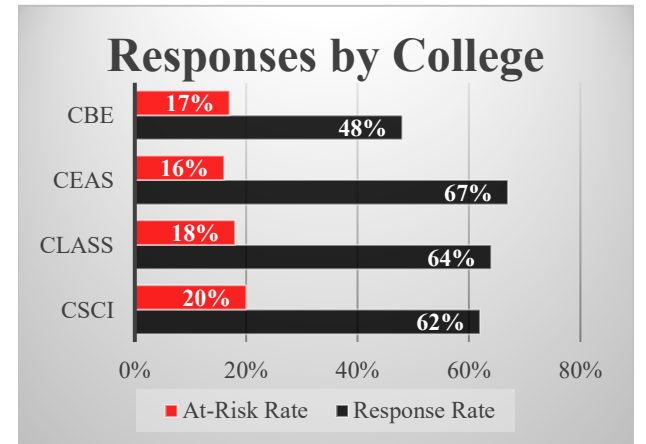
THE PROGRESS REPORT

Semester by Semester Data Highlights

The Spring 2021 progress report campaign began on February 16 and ran through March 20. There were 19,997 evaluations consolidated and sent out by advisors on behalf of 4,075 students for selected student populations. This was our largest cohort of students for progress reports. We saw a positive response rate by faculty of 62% (12,499 returned reports) and an “at risk” rate of 17% (2,200 returned reports marking the student in question as “at risk” for failing the course). The “at-risk” marked reports were for a total of 1,496 students, of which 259 students had 3 or more “at-risk” reports filed. 114 of those were first time freshman. The number one “at-risk” reason marked was “missing assignments”. A chart of response percentage by college can be seen off to the right. Thank you, faculty, for your responses and concern for our students. These reports do make a difference and allow our advisors to make changes and get the resources to our students.

Academic Alerts and Cases are the other form of early alert for our campus. They can be

viewed as faculty reaching out through Bay Advisor about a specific student to our advisors where progress reports can be viewed as our advisors reaching out to faculty for information on specific students. The Academic Alerts and Cases program launched in fall of 2019, and with the ongoing pandemic has continued to be a valuable tool for faculty in getting students assistance. This fall, we had 460 academic alerts issued for students, which is up from the 394 we had in fall semester. All alerts become cases which our advisors work to close with the student. Similar to the progress report campaign, the most common alert reason was for missing assignments. 204, or 44%, of the alerts were marked for missing assignments. All alerts issued in Spring 2021 had the cases closed in in Spring 2021 by the responding assigned advisor. Faculty can create or initiate alerts and see the current status within the Bay Advisor Platform. If there are any questions about this process or how to get students that you see struggling the assistance they need, please email bill.irwin@csueastbay.edu.



EAB Academic Planner on HOLD

This Spring registration cycle our College of Business and Economics participated in an EAB Academic Planner pilot program to test the viability of this add-on to our Bay Advisor platform. Academic planning is one aspect of advising that can take a lot of time from our advisors. The idea of an academic planner is to help give time back to our advisors by helping our students plan out their courses to graduation along their time line, whatever that may be. In concept, this is a great tool, and could be a great compliment to our caseload management development across campus. It would help our FASST team get our first-time freshman population started and to later hand them off to their major advisors once they reach upper division status. The academic planner feature is designed to help our transfer students plan out the courses they have remaining in conjunction with their staff or faculty advisor.

Jennifer Aure and her team in CBE along with Clarissa Hernandez in APS did an incredible job launching pilot for the planner. We learned a lot about academic planning, what questions to ask when developing academic templates to apply to our curriculum, and how a planner could help our advising loads. We also learned that students want an easier way to communicate with their advisor(s), especially when they are making changes to their academic plan. On the advising side of the planner, we also learned that advisors need a simpler way to review student changes. After all we learned, we have decided that we will not pursue the academic planner from EAB. It does not fit the needs of our campus, our students and our advisors at this time.

Advising on our campus must be relationship based. Our students, especially through the pandemic, want and will continue to crave a personalized relationship with our campus. Advising is one of the pathways in developing that needed relationship. The idea of an academic planner is to enhance the student/advisor relationship by giving our advisors time back and allowing our students to communicate easily and effectively with their advisor about course selection. As we developed the planner and began testing in in the College of Business & Economics, we realized that we as an advising community and administration are not ready for this type of planner, nor is our diverse student body.

Down the road as our advising shift to caseload management evolves, our advising culture evolves, and the EAB planner itself evolves, we could come back and revisit this planner. Academic planners are useful tools, but they, along with all technology, must match the needs of the campus community.

Business Admin BS - Marketing Management 120 Credits Estimated graduation **Fall 2023**

This is what your plan would look like if you were a full time student, taking about 15 credits in the Spring and Fall. Use this plan, or create your own. You can always change it later

Plan From Scratch | Create Custom Template | Use This Template

Semester	Credits	Courses
Fall 2021	15 - 17 Credits	ACCT220 Legal Environment of Business GE Area D and American Institutions (US Cod... placeholder STAT 100 – Elem. Statistics & Probability OR ... placeholder GE Area B2 placeholder American Institutions (US Code: US-1 and US... placeholder
Spring 2022	15 Credits	MKTG310 Marketing Research MGMT300 Business/Professional Ethics MGMT350 Decision Science ITM300 IT Management FIN300 Financial Management
Fall 2022	15 - 16 Credits	MKTG314 Consumer Behavior MGMT370 Business, Govt & Society MGMT310 Organizational Behavior ECON380 Managerial Econ & Bus Strat Upper Division GE Area C and Diversity Overlay placeholder
Spring 2023	15 - 16 Credits	MKTG440 Marketing Strategy MGMT360 Operations Management BUS335 Communications in Team Bldg Upper Division GE Area D and Social Justice ... placeholder Marketing Management Concentration Electi... placeholder
Fall 2023	12 Credits	MGMT499 Strategic Business Management ECON 385 –Global Economic Analysis OR M... placeholder Marketing Management Concentration Electi... placeholder Marketing Management Concentration Electi... placeholder Free Elective placeholder

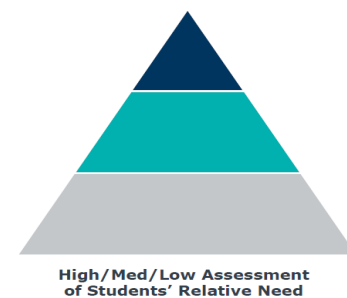
^^^ Snapshot of a completed plan in the EAB Academic Planner

REMINDER

End of the Semester and Summer To-Do's:

- ✓ **Take a Break**
You deserve it. Relax, recover, breath, stretch, do something for you.
- ✓ **Encourage Continuing Students**
Send out happy texts or emails to your students. Let them know you care about their successes just as much, if not more so, than their failures.
- ✓ **Congratulate your Students**
Those who have graduated, let them know you are proud of them.
- ✓ **Build a Plan for Fall**
Failing to plan is planning to fail and it is better to have something rather than nothing. Think about what you can plan and how you want your fall to look. Develop goals or milestones for your approach to student success.
- ✓ **Review the Year**
Take some time and reflect. What went well? What didn't? What do you have control over that can be changed?
- ✓ **Build new Student Lists**
Work in Bay Advisor and separate out your students by different Student Lists in prep to use the feature to assist with messaging, campaigns and data collection.

Caseload Management



Six Steps to an Equitable Approach

Caseload management is a skill set that needs to be developed on our campus, especially as our advising approach changes to meet the needs of our students and the advising redesign. Managing some of the caseloads we currently have on our campus is an art form, a balancing act, and unless done tactfully, can drive one crazy! A change like this is not easy and all of you should be applauded for your efforts.

The good news is that there is help out there. Bill Irwin has prepared a discussion-based training on managing a caseload equitably and

it can be applied to caseloads of any size. As part of the discussion, you will be asked to define caseload management, and talk through what your equitable service breaks are in student need and support. Bill presents a six-step approach taken throughout each semester to assist advisors in managing the students assigned to them. Those steps are:

1. Getting to know students and prioritizing
2. Setting a goal and planning outreach/campaigns
3. Executing outreach and follow through

4. "In-Person" support and referrals
5. Monitor and Document
6. Review (AAR)

Each step is broken down into manageable pieces which can be adopted by each individual advisors' approach and their students' needs. Caseload management is an ever-evolving skill. Hopefully this discussion can assist advisors in developing their own equitable approach to their students.

If you would like to learn more or have the discussion, please contact Bill at bill.irwin@csueastbay.edu to set up a meeting for individuals or groups of any size.

ADVANCED USER: STUDENT LISTS



We all know how important it is for our students to be organized for their success. Keeping their classes straight, their deadlines in each class, papers, tests, quizzes are all important and all need to be organized in some way that will work for the student. Then throw in the rest of life that our students need to manage and work with. It can be a lot. Getting organized is one of the ways students can take some level of control of the chaos that can be created just by being a "college student". We as advisors need to be organized as well for our own success and the success of the students in our care. We have a lot going on too. A lot of students in our caseloads and banging down the door, their academic and personal turmoil's, and of course our own too. To help us take some level of control, being organized with our caseloads can help. Student Lists are an incredibly powerful tool

in Bay Advisor that can help organize your caseload and student data, and assist with student messaging, appointment campaigns, and end of term/year reporting with analytics. A student list is a static list of students that you can then monitor over time. They are local to your Bay Advisor account and can only be viewed by you or specific administrators with the correct permissions. They are easy to create in Bay Advisor and can be created based on almost any data point you can think of, even if that data point lives outside of the platform. Student lists are developed in the platform through the advanced search feature and if the data point(s) you want to use live outside the platform, lists can be uploaded via .csv excel files. A short how to is published on the Bay Advisor info page and can be found [HERE](#).

Summer is upon us. Now is the time to think

about what populations you want to dive deeper into from a data perspective. These sub-populations are what you will want to create student lists for. Some examples of data points to think about when creating students lists include students who are part of specific student groups (entry term cohorts, athletics, EOP, expected grad term, etc.), categories or tags. GPA, earned unit ranges, specific majors and/or concentrations or even students who have taken or who have enrolled in specific courses, or earned specific grades in the specific course are good concepts for student lists too. These specific sub-populations come fall with student lists built will allow you to organize and build a plan for your communication and have some control of the chaos.