



# Charting a Path to **Persistence**

Strategic Interventions for Adult and Online Learners

# COE Forum

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# Supporting Members in Best Practice Implementation

## Resources Available Within Your Membership

This publication is only the beginning of our work to help members support the success of adult and online learners. Recognizing that ideas seldom speak for themselves, our ambition is to work actively with members of the COE Forum to decide which practices are most relevant for your organization, accelerate consensus among key constituencies, and save implementation time.

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# Executive Summary

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## **A Not So “Nontraditional” Experience**

Leaders of continuing, professional, and online education have long known that the experience of the “nontraditional” student *is* the typical student experience. The National Center for Education Statistics (NCES) designates more than 70% of currently enrolled postsecondary students as having one or more characteristics of a nontraditional learner, noting that these students are automatically at higher risk for attrition than their traditional counterparts.

Preventing stop-outs and promoting persistence is arguably hardest for those serving adult and online learners, as retention and graduation strategies that work well for traditional, campus-based students have only partial applicability for working adults, who often have little connection to an institution and face competing demands on their time. Lacking sufficient resources to duplicate the robust support resources of the main campus, most continuing, professional, and online education units require effective yet lower-cost approaches to meeting student needs.

Identifying a practical approach to persistence is all the more urgent as a growing number of prospective students seek evidence of academic, financial, and career outcomes when choosing among programs and institutions. The three most important considerations for adult and online learners continue to be convenience and flexibility of offerings, financial assistance and affordability, and the academic reputation and outcomes of the institution. Enrollment (and revenue) gains are increasingly reserved for those continuing, professional, and online education units that best demonstrate an institutional commitment to adult and online learner success.

## **Three Retention Disciplines for Continuing, Professional, and Online Education**

Promoting persistence among adult and online learners requires:

- Monitoring indicators of students’ financial, academic, and engagement risk and embedding intervention and follow-up into instructor and advisor workflow
- Encouraging re-enrollment by tracking term-to-term persistence and securing advance permission to contact students following necessary stop-out periods
- Facilitating adult degree completion by eliminating both real and perceived barriers to enrollment through proactive outreach campaigns, simplified readmission procedures, and special financial incentives

## **Charting a Path to Persistence**

This study details 13 strategic interventions to monitor financial, academic, and engagement stop-out risk, encourage re-enrollment, and facilitate adult degree completion.





# New Urgency in 'Nontraditional' Student Success

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INTRODUCTION

# Defining ‘Success’ Across a Diverse Portfolio



## Adult Degree Completion

Returning students compare programs based on outcomes and the quality of student services.



## Online Learning

Much of the campus success infrastructure presumes F2F interaction.



## Professional Master's

Students enroll to achieve specific career goals and objectives that must be tracked.



## Noncredit Courses

Repeat purchase necessitates that a student see a clear benefit to each course completed.



## Program Director

University leadership and accreditors want success metrics, but what matters in my program is simply different than what the main campus counts.



## Marketing Director

Outcomes and results—an ability to demonstrate value—guide prospective students' searches. Our marketing messages must communicate success.

Across the spectrum of continuing, professional, and online education, there is a growing need to more precisely define and more consistently demonstrate institutional commitment to students' academic and career success. The definition of "success" differs across the portfolio, but commitment to outcomes, persistence, and completion is shared. The graphic above outlines how success is defined across four common COE groups:

- Degree completion programs define success as graduation. They emphasize academic services and advising intended to support a student's return to academic coursework.
- Online programs may need to couple an emphasis on completion with evidence of high-quality learning outcomes and flexible support.
- Professional master's programs define success in terms of specific career objectives like advancement in one's field or successful transition to a new industry.

- Noncredit courses must clearly articulate benefits to enrollment in order to encourage an individual course-taker to take the next course in a sequence or to try an additional non-credit experience.

And it's not enough to just be successful; a program needs to make sure current and prospective students know that the program can help them succeed. Marketing directors increasingly need to highlight success in outreach campaigns and content marketing, while deans and program directors note how the emphasis on undergraduate student has led to more rigorous success monitoring and reporting among continuing, professional, and online education units.

Finally, many units note that as undergraduate student populations look increasingly "nontraditional," core campus colleagues are beginning to seek COE guidance on how best to promote persistence.

Source: EAB interviews and analysis.

# More Important Than Ever

## Three Forces Elevating Nontraditional Student Persistence

1

### Not So “Nontraditional”

73%



Nontraditional

- Growing proportion of nontraditional enrollments
- Requires formalized, well-resourced support infrastructure

2

### Competing on Completion



- Competitors growing share based on compelling results-focused marketing
- Transparent career, cost, and academic outcomes

3

### Raising the Outcomes Bar



- Monitoring accreditation risk and requirements
- Gainful Employment 2.0
- Internal marketing to acculturate campus to COE value proposition

Student success has always been central to the mission of continuing, professional, and online education units. However, three forces are elevating “nontraditional” student persistence on the list of institutional priorities.

First, as COE leaders have long known, “nontraditional” students represent the majority of postsecondary enrollments in the United States. The National Center for Education Statistics (NCES) designates more than 70% of currently enrolled postsecondary students as having one or more characteristics of a nontraditional learner. The experience of the nontraditional student *is* the typical experience.

Second, students increasingly are comparing institutions on the basis of academic and career outcomes, and leading institutions are using evidence of the success of their students and alumni to secure a growing share of enrollments (and revenue).

Finally, while student success measurement and reporting has to date focused on first-time, full-time students, there is evidence that regional accreditors, foundations and other third parties are beginning to raise the bar in terms of holding COE units accountable for monitoring and reporting on the success of their student populations.

Source: EAB interviews and analysis.

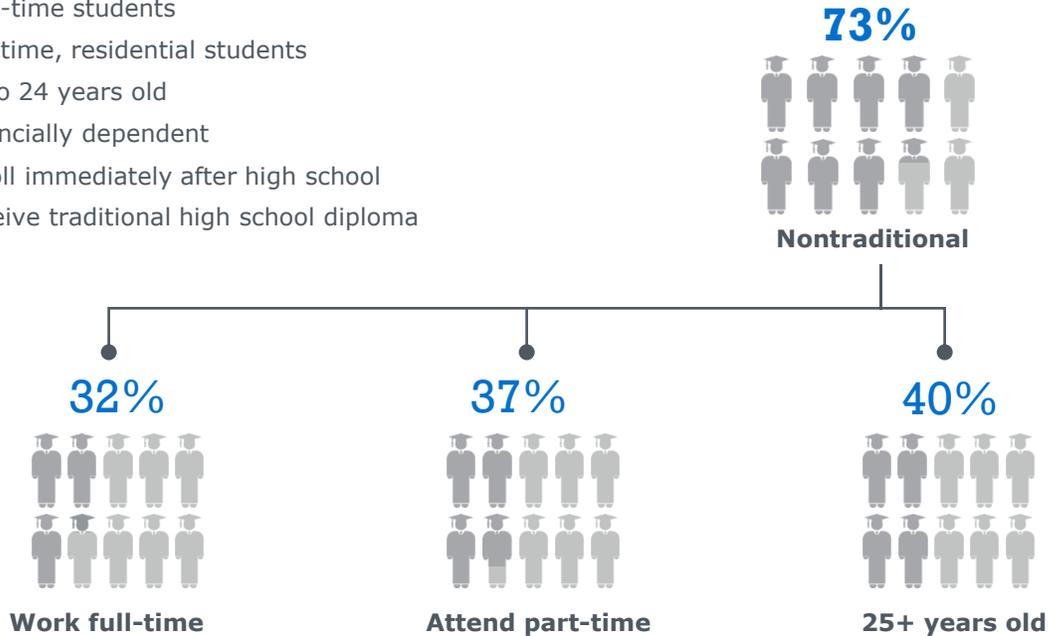
# A Hidden Higher Ed System

## Millions of Postsecondary Students Below the Success Radar

### Traditional Completion Rates Count...

- First-time students
- Full-time, residential students
- 18 to 24 years old
- Financially dependent
- Enroll immediately after high school
- Receive traditional high school diploma

### ...But How "Traditional" is Higher Ed?



Federal reporting requirements and the national conversation about student success reflect the experiences of only a small percentage of students: first-time, full-time, 18-22 year olds pursuing residential higher education programs immediately after high school.

Absent is the experience of the majority of students pursuing higher education today. NCES reports that 73% of all students enrolled in postsecondary institutions in the United States have at least one of the seven characteristics of a nontraditional student, listed on the next page.

Examining NCES data from 2011, 32% of students enrolled in postsecondary education work full-time, 37% attend part-time, and 40% are older than 25. Individuals with three or more characteristics of the

nontraditional student are at moderate to high risk of not completing, with nontraditional students more likely to stop-out in their first year and less likely to complete a bachelor's degree within five years than their traditional counterparts.

Given these figures, it is imperative that institutions gain a fuller understanding of the barriers to persistence and completion among adult learners, working professionals, and part-time students.

And, it is critical that we do so quickly, as this student population is projected to experience double-digit growth across the next decade. Specifically, the NCES projects a 21% increase in enrollment of students aged 25 to 34, and a 16% increase in those 35+, by 2020.

Source: Susan Choy, Findings from the Condition of Education 2002: Nontraditional Undergraduates, National Center for Education Statistics, <http://nces.ed.gov/programs/coe/2002/analyses/nontraditional/index.asp>; "Time is the Enemy," Complete College America, 2011, [http://www.completecollege.org/docs/Time\\_Is\\_the\\_Enemy.pdf](http://www.completecollege.org/docs/Time_Is_the_Enemy.pdf); National Center for Education Statistics; EAB interviews and analysis.

# Automatically at Higher Risk

## Nontraditional Students Less Likely to Persist and Complete

### Seven Characteristics of Nontraditional Learners



Delays postsecondary enrollment beyond a year of high school completion



Long term postsecondary part-time enrollment



Full-time employment while enrolled (35 or more hours)



Classified as financially independent for financial aid purposes



Financially supporting dependents other than spouse

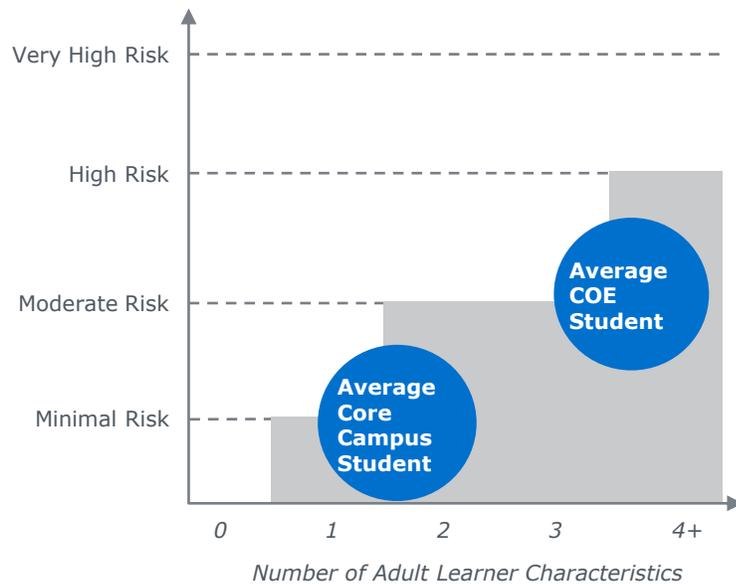


Single parent status

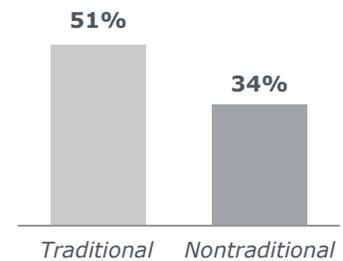


Lacking a traditional high school diploma (earned GED)

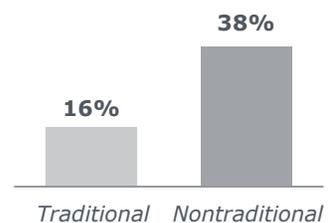
### Nontraditional Student Continuum



### Bachelor's Completion Within Five Years



### Students Who Leave School in First Year



Source: National Center for Education Statistics, <http://nces.ed.gov/pubs/web/97578e.asp>; Catherine Cash, "Breaking Down Barriers and Building Opportunities for Nontraditional Students,," presented at: NASPA FL Drive-In Conference, 2013; EAB interviews and analysis

# Outcomes as Marketing Advantage

## Capella University's Award-Winning Learning Outcomes Portal

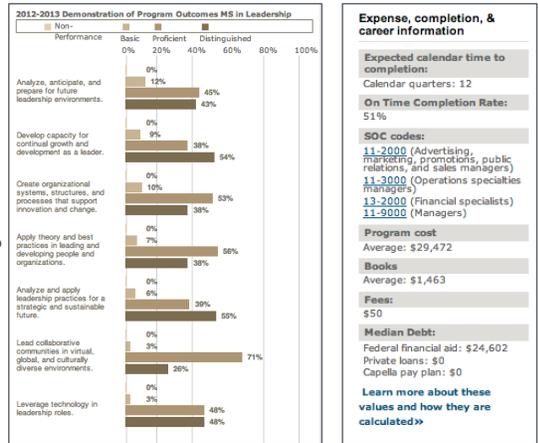


**Linking Learning to Career**

- Copy emphasizes career value and alumni satisfaction
- Multimedia-rich interface lets students, alumni, faculty speak to success

**Outcomes for Every Offering**

- Program-level outcomes snapshot communicates what it takes to succeed
- Expense, completion, and career information all in one place



A second force elevating the importance of nontraditional student success is the use of academic and career outcomes as a point of competitive differentiation. Prospective adult learners and working professionals have a large and growing number of institutions and programs to choose from when considering a return to higher education. Institutions with strong evidence of student academic and career outcomes can use that data to make a compelling case for enrollment, helping them to stand out in a crowded market.

One best-in-class example of using outcomes in marketing and recruiting is Capella University. Partnering with design consulting firm IDEO, Capella created CapellaResults.org, a content-rich web portal that highlights learning outcomes, student satisfaction

data, and cost information alongside student, faculty, and employer testimonials. For each program Capella University offers, a prospective student can find financial information including cost to attend and average student debt at graduation, academic outcomes like average time to completion, and career outcomes including positions and job roles that graduates of the programs secure.

Sites like Capella University's are setting a new standard for digital marketing and web presence, demonstrating how clearly defined and communicated outcomes can be used in marketing messages and brand awareness campaigns to effectively "compete on completion."

Source: Capella University, capellareults.org; EAB interviews and analysis.

## Outcomes Definition Efforts Gaining Traction

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### Accreditors Requiring Nontraditional Success Reporting

#### *WASC Leading the Charge*

Providing templates for collecting graduation rates for all students, including nontraditional, part-time, graduate and adults



### Defining Success for Military and Veteran Students

#### *Servicemembers Opportunity Colleges Convenes Working Group*

Recommending metrics to track success among military and veteran student cohorts benefiting from federal aid



### Tracking Prior Learning Credits and Identifying “Near Completers”

#### *WICHE and Lumina Foundation Lead Multi-state Effort*

Generating policy solutions to increase adult degree completion through Adult College Completion Network and Non-traditional No More campaigns

While federal student success reporting is largely focused on the experience of first-time, full-time students, there is a growing sense that regional accreditors and the Department of Education (ED) will soon raise expectations for reporting and monitoring success among COE student populations. Perhaps a first step in that direction, as of July 1, 2015, new federal Gainful Employment (GE) rules took effect, requiring higher education institutions to follow new reporting, disclosure, and certification requirements, as well as report debt-to-earnings metrics designed to assess programmatic “return on investment.”

The Western Association of Schools and Colleges (WASC) now asks institutions to track and define student success outcomes for all students, including those enrolled part-time or classified as adult learners.

WASC and other regional accreditors are creating reporting templates and working with institutions to define and measure success outcomes for these student populations.

The Lumina Foundation and the Western Interstate Commission for Higher Education (WICHE) are also focused on improving efforts to define, monitor, and report outcomes for adult degree completion populations given the national emphasis on increasing postsecondary attainment rates. And institutions serving special populations, including the Servicemembers Opportunity Colleges serving active-duty military and veterans, are working together to more precisely monitor and report outcomes.

Source: “Educational Attainment: Tracking the Academic Success of Servicemembers and Veterans”, <http://assets.system.tamus.edu/files/veterans/pdf/symposium-presentations/soc-educational-attainment-final.pdf>; Western Association of Schools and Colleges, [www.acswasc.org](http://www.acswasc.org); WICHE, Strategies for Success Policy Brief, <http://www.wiche.edu/info/publications/accnPolEx-strategies-for-success.pdf>; EAB interviews and analysis.

# Efforts to Diagnose Attrition Limited

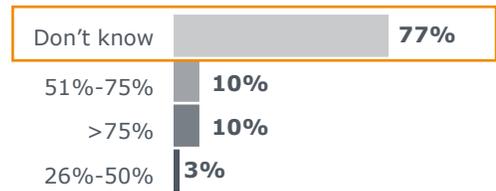
## UPCEA/Inside Track Survey Reveals Incomplete Picture of Success



Does your institution track retention and degree completion rates for nontraditional students?



What is your current degree completion rate for nontraditional students?



How well does your institution understand the root causes of attrition among your nontraditional students?



Given these forces, most continuing, professional, and online education units are considering making new or increased investments in staff and systems to more precisely define, measure, and report on student success.

A 2013 University Professional and Continuing Education Association (UPCEA) and InsideTrack survey revealed that while 69% of responding continuing, professional, and online education units track retention and completion rates, 77% do not know the current degree completion rate for nontraditional students. Moreover, a majority of respondents report that their

institution only “has some initial ideas” as to the root causes of attrition among this student population, with 15% of all responding institutions only beginning to explore the many and complex reasons why nontraditional students fail to complete.

There is clearly more work to be done to elevate campus and unit conversations on the success of students served primarily by continuing, professional, and online education units.

Source: “Measuring Post-Traditional Student Success: Institutions Making Progress but Challenges Remain,” presented at UPCEA InsideTrack, 2013; EAB interviews and analysis

# Most at Risk, Least Engaged

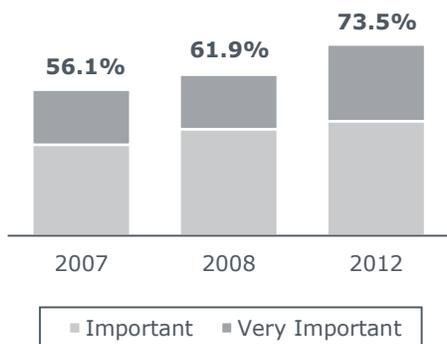
## Student Success Requires More Than Technology

### Justified Concerns Over Online Retention

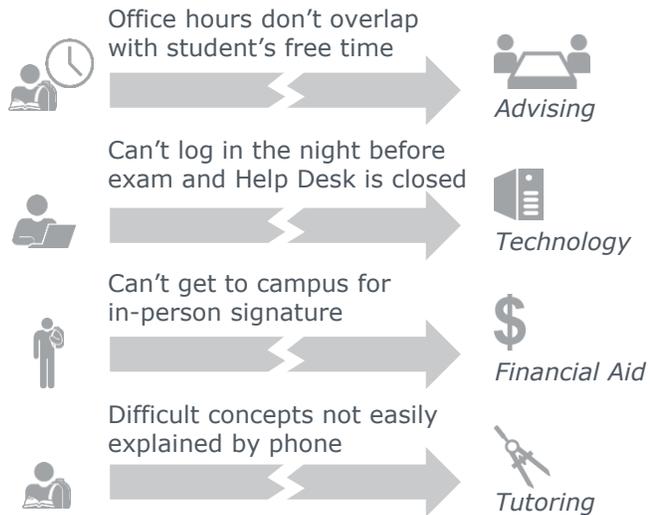
**10-20%**

Typical gap between completion rates for online courses vs. comparable face-to-face sections

### Institutions Citing Retention Concerns as a Barrier to Growth of Online Instruction



### An Inflexible Service Portfolio Creates Pain Points for Adult & Online Learners



Despite a lack of formal measurement, most institutions recognize that students served by COE units are often at greatest risk and the most challenging to engage. This is especially true at institutions serving large populations of online learners.

Despite a growing body of scholarship on the quality of online instruction, concerns persist about the learning outcomes and completion rates of students enrolled in blended or fully online courses. Many institutions are still working to ensure that all faculty and instructors have been trained in developing and delivering quality courses across a variety of modalities.

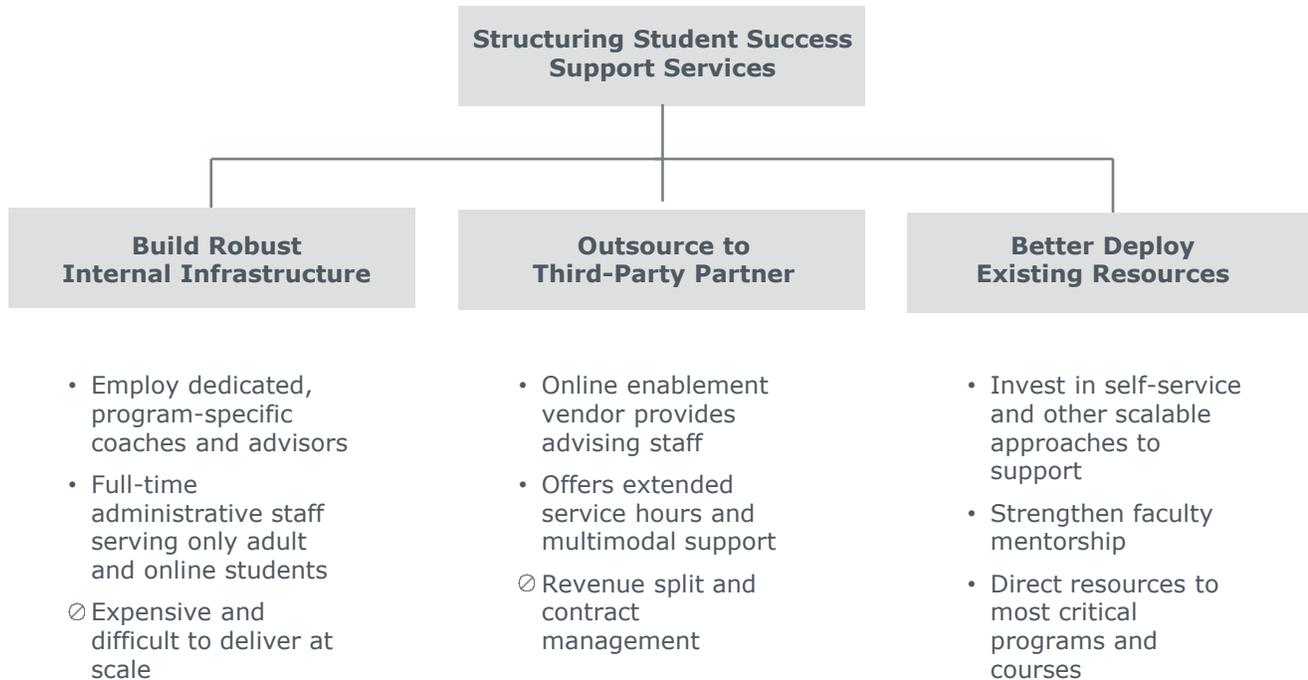
Beyond the classroom, administrative and student support services are rarely structured to meet the

unique needs of the online learner. Anecdotes abound of students who work during the day when campus units are open and struggle to secure support during evenings and weekends when they turn their attention to coursework. Even those units that have invested in 24/7 support systems find that university academic policies may not yet reflect the experience of the online learner. Students may be required to secure a signature to drop or add a course, or may need to make an in-person appointment with the financial aid office to review student loan paperwork.

Increasing the persistence of adult and online learners requires a different approach.

Source: Lorraine M. Angelino, et al, "Strategies to Engage Online Students and Reduce Attrition Rates," The Journal of Educators Online, Volume 4, Number 2, July 2007; 1. Elaine Allen and Jeff Seaman, "Changing Course: Ten Years of Tracking Online Education in the United States," Babson Survey Research Group, <http://www.onlinelearningresearch.com/reports/changingcourse.pdf>, 2013; EAB interviews and analysis

# Three Models for Supporting COE Student Success



There are three common approaches to providing dedicated support services to adult and online learners.

Adult-serving institutions or those with a majority adult or online student population develop robust internal infrastructure. These units employ dedicated, often program-specific, recruitment and advising staff who specialize in meeting the needs of the adult and online student population. While this model provides excellent support, it is expensive and difficult for most COE units to achieve.

Insufficient resources to support internal staff and services leads many units to partner with online

enablement or other third-party vendors for adult and online-friendly recruiting, advising, and academic or career support services. While a third-party vendor can offer the flexible and dedicated support preferred by adult and online students, this support comes at a cost.

The vast majority of COE units and institutions are looking for a middle ground, relying on faculty and peer support models and making select investments in services most meaningful to students enrolled in signature programs.

Source: EAB interviews and analysis.

# An Expensive Proposition

## Dedicated Staff Advisors Lead to Meaningful Gains

### Full-Time Staff, Serving Online Only

Online students are first and only advisor priority

### Program-Specific Advisors

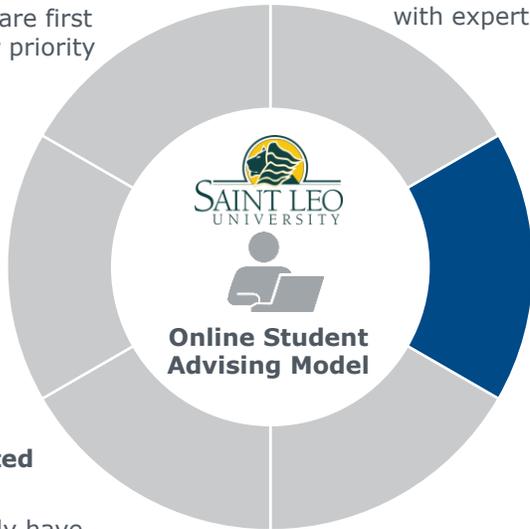
Students assigned to advisors with expertise in their program

### Single Point of Contact

Students have same advisor throughout

### Service-Oriented Background

Advisors typically have master's-level experience in education or social work



**Online Student Advising Model**

### Increased Availability

Advisors work evenings, summer

### Dual Communication Triggers

#### Proactive

- Welcome call
- 2-week check-in

#### Reactive

- Automatic LMS Triggers
- Low participation
- Poor scores



### Advising Key Metrics

#### Student-to-Advisor Ratios

- Undergraduate: 175—220:1
- Graduate: 220—260:1

#### Average Advisor Call Load per Day

- 30 to 40 calls placed
- ~10 calls received

At Saint Leo University, online learners are assigned a full-time, program-specific online advisor who serves as a primary institutional point of contact throughout the students' time enrolled.

This dedicated online-only advising model can better reflect the learning preferences and unique needs of the online student population. Online advisors typically have master's-level experience in education or social work, equipping them to serve not only as a triage point for administrative issues but more importantly as counselors and coaches. Advisors work evenings and summers to ensure responsiveness and to provide support at times and hours when students are more likely to be focused on their coursework.

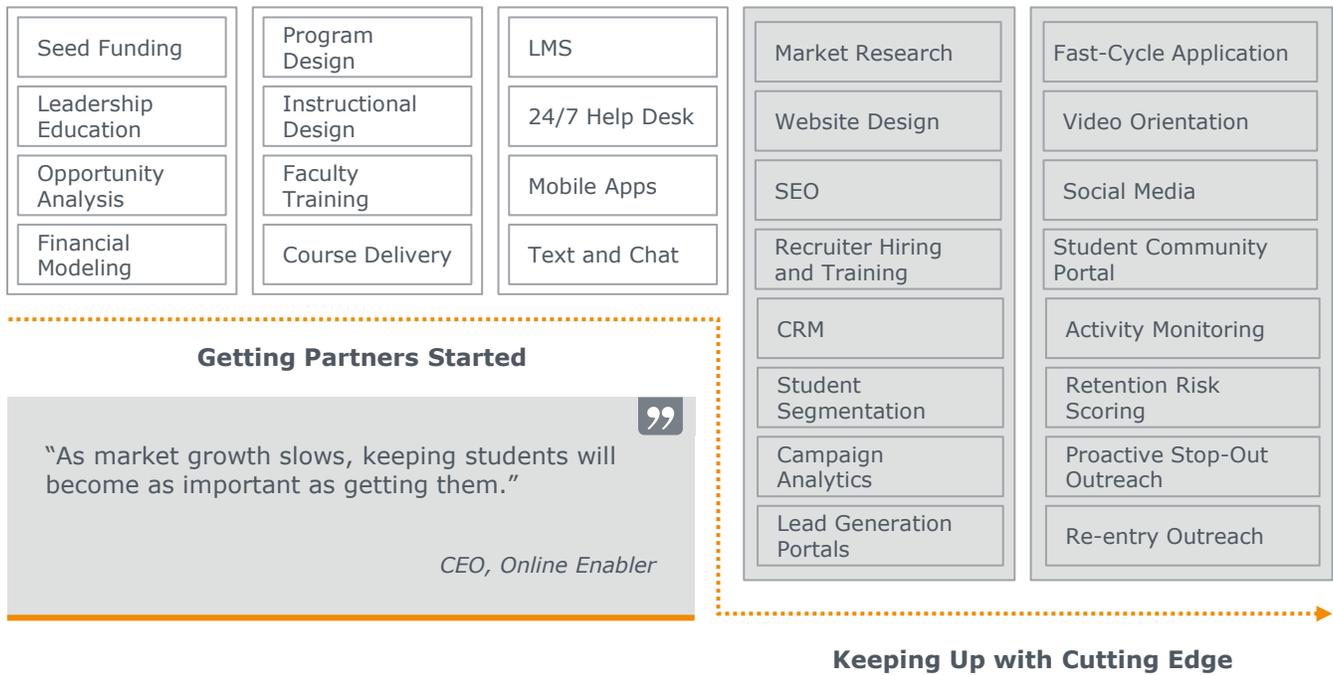
Saint Leo University's advisors spend most of their time directly interacting with students, placing 30 to 40 calls to advisees each day and answering up to 10 inbound requests. All students receive a welcome call introducing their advisor as well as a check-in call two weeks into each term, and advisors closely monitor LMS activity and instructor grades for early signs that a student might require intervention.

While many COE units aspire to a dedicated student advising model like Saint Leo's, few have the resources to achieve this high-touch, highly personalized coaching model at scale.

Source: EAB interviews and analysis..

# Trading Up the Value Chain

## Online Enablers Justify Tuition Splits on Next-Generation Markets and Retention



Lacking sufficient internal resources to support a dedicated advising model like Saint Leo’s, many institutions and COE units are turning to online enablement vendors or other third-party partners to provide dedicated student support and advising services to adult and online learners.

As institutions have developed internal capabilities in program development, instructional design, and IT

support, the value of partnering with an online enablement vendor has begun to shift from those “early stage” activities (identified in the white boxes above) to the later-stage activities depicted in the gray boxes.

Online enablement vendors justify their share of program revenue on the strength of their marketing, recruiting, and student services capabilities.

Source: EAB interviews and analysis.

# Enlisting a Corps of Part-Time Advisors

## Professional Development Opportunities for Students and Staff Volunteers

### Online Course Peer Mentors



- Students nominated by faculty as strong class contributors
- Assigned to 40% online classes
- Log in at least twice a day; respond within 48 hours
- Encourage discussion, answer technical questions, contact “disappeared” students

**> 50% cost savings compared to TAs**

### Staff Volunteers



- 40 clerical, administrative, and professional staff volunteers
- Paired with student on academic warning for term
- Weekly phone call supplemented by emails
- Connect to other campus resources, discuss assignments, provide advice on working with faculty

**40% move out of warning status**

There are many individuals on campus who can support adult and online student persistence, often at much lower cost than hiring full-time professional advisors or partnering with a third-party provider.

Washington State University offers eight undergraduate degrees entirely online. Approximately 40% of their online courses have peer mentors—students who were nominated by faculty as strong class contributors. Frequency of contact is an important charge of these peer mentors; they have strict guidelines in terms of how often they should login and how quickly they must respond to questions.

SUNY Empire State College has a similar practice to provide support students enrolled in their distance learning programs. Empire State recruited 40 clerical and administrative staff to, on a volunteer basis, be

trained as mentors for students on academic warning. Volunteer mentors are required to call their assigned students weekly during the course of the term and email them between calls. The focus of these conversations is to surface not only academic issues but also any financial, personal, and other risk factors for attrition.

Volunteers might connect a student to a campus resource or provide advice on working with faculty. Students receive a high level of personal support—at a low cost to the institution—and the staff also see it as professional development, a way for clerical staff to build their resumes and explore other job opportunities.

Source: EAB interviews and analysis.

# Alleviating Common Pain Points

## Adult Learners Seeking Assurance of Support Prior to Enrollment



### Top Criteria for Nontraditional Applicants

**#1**

Convenience and Flexibility of Offerings

Promoting persistence among adult and online learners requires monitoring three risk factors for attrition: financial risk, academic risk, and engagement risk. Said differently, institutions need to assure prospective students that they can afford to return, that there are support services in place to ensure their academic readiness and success, and that they will be able to balance competing demands on their time.

Cost and availability of financial assistance remains a top criteria for nontraditional students. Many adult learners are ineligible for federal financial aid, either having exhausted their eligibility or failing to qualify based on their program or credential of choice. Special scholarships and tuition discounts can be especially meaningful to students who are weighing the return on investment in continued education.

**#2**

Cost and Availability of Financial Assistance

Beyond financial concerns, the return to academic coursework—whether to complete an undergraduate degree or pursue a professional certificate or master’s—brings with it questions of academic readiness. Many online learners may have concerns about navigating the online learning environment or worry they won’t have adequate instructor or peer support absent a classroom environment. Students seeking to complete an undergraduate degree may be returning to the classroom after years (or decades) away.

Finally, many adult and online learners are concerned with successfully balancing the many competing demands on their time. These students, perhaps more than most, desire a community of instructors, peers, and institutional staff who will support them throughout their educational career.

**#3**

Academic Reputation and Outcomes

Source: "The Factors Influencing College Choice Among Nontraditional Students," [https://www.ruffaloni.com/documents/shared/Papers\\_and\\_research/2012/2012\\_Adlt\\_Factors\\_to\\_Enroll.pdf](https://www.ruffaloni.com/documents/shared/Papers_and_research/2012/2012_Adlt_Factors_to_Enroll.pdf); EAB interviews and analysis.

# Charting a Path to Persistence

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## Strategic Interventions for Adult and Online Learners

### Monitor Stop-Out Risk

**1**

#### *Financial Risk*

1. Financial Hold Reconciliation
2. Triaged Administrative Support
3. Self-Service Financial Aid Counseling

**2**

#### *Academic Risk*

4. Discussion Post Risk Tags
5. Faculty Tutorial Referrals
6. Risk Score Analytics

**3**

#### *Engagement Risk*

7. Midterm Stress Questionnaire
8. Practical Community Engagement

### Encourage Re-enrollment

**4**

9. Escalating Re-enrollment Outreach
10. Proactive Re-approach Campaign

### Facilitate Adult Degree Completion

**5**

11. Expedited Re-admit Procedures
12. Second Opportunity Financial Incentives
13. Statewide Completion One-Stop Shop





# Monitor Financial Stop-Out Risk

*Can I Afford It?*

---

PART

1

- 1: Financial Hold Reconciliation
- 2: Triaged Administrative Support
- 3: Self-Service Financial Aid Counseling

# Strategic Objectives for Financial Support

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<p><b>1</b></p> <p><b>Separate Paperwork Confusion from Financial Distress</b></p> <ul style="list-style-type: none"><li>• Financial Hold Reconciliation</li><li>• Emergency Grants and Micro-scholarships</li></ul>	<p><b>2</b></p> <p><b>Build Self-aware Consumers of Financial Aid Information</b></p> <ul style="list-style-type: none"><li>• Triaged Admin Support</li><li>• Self-service financial aid counseling</li></ul>
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There are two ways COE units can prioritize efforts to monitor the financial stop-out risk of adult and online learners.

First, before allocating scarce financial assistance and staff time to address student financial concerns, it is critical to distinguish between students who are confused by paperwork requirements and deadlines and those who are truly experiencing financial distress.

A more precise understanding of the reason why a student has not fulfilled a requirement, submitted a payment, or completed a form allows the COE unit to target emergency assistance—small grants or micro-scholarships—to students with greatest need.

Second, to elevate the financial literacy and awareness of as many students as possible, institutions should also offer self-service or peer-provided administrative and financial counseling. Self-service tools provide flexible and just-in-time answers to students questions, help to minimize paperwork confusion, and preserve the time and attention of financial aid counselors and other administrative professionals for the most complex or urgent instances when resolving a student’s financial concerns requires their expertise and counsel.

Source: EAB interviews and analysis.

# Separating Paperwork Issues from Real Distress

## Xavier’s Escalating Interventions for Resolving Bursar Holds



### Phase One

#### Mass Email Reminder

- Audit two weeks prior to registration
- Automated email to students with outstanding balances
- Effective for most students



### Phase Two

#### Personalized Support

- When registration opens
- Weekly audits continue, confirming that students clear their holds
- Students still on hold targeted for phone or in-person counseling



*Assistance needed to resolve bursar holds*



### Phase Three

#### Emergency Funds

- Emergency micro-scholarships to students with urgent financial issues
- Typically \$1,000 or less, funded by small alumni donations and undistributed Perkins loans
- 98% of recipients graduate



*Students in financial distress*



Small unpaid bursar balances can prevent students at many institutions from registering for classes for the next term or semester, increasing the likelihood of stop-out and decreasing the chance that the institution will collect missing revenue.

Retention professionals at Xavier University work with the bursar’s office to audit student records for holds two weeks prior to the start of registration. Students with outstanding balances receive an email notification that suggests steps to resolve the hold and offers assistance. Audits are re-run weekly through the registration period to identify new holds. For most students, this intervention is sufficient and minimal staff time is required.

Beyond the email campaign, Xavier has a series of escalating interventions to support students in financial distress. Some students can resolve a hold only after a brief phone or in-person counseling session, while a small number of students each term are unable to resolve a hold absent institutional financial assistance.

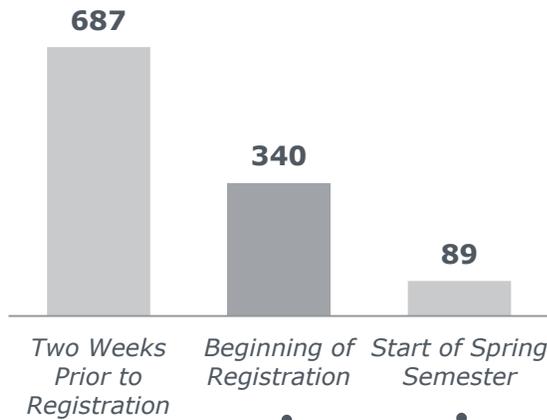
Students identified to be in true financial distress are eligible to receive emergency micro-scholarships. The amount awarded is typically less than \$1,000—on average most students receive \$250—and funded through special alumni donations or undistributed Perkins loans. Students awarded micro-scholarships must be in good academic standing.

Source: EAB interviews and analysis.

# Success on All Fronts

## Resolution of Holds Credited with Improved Retention

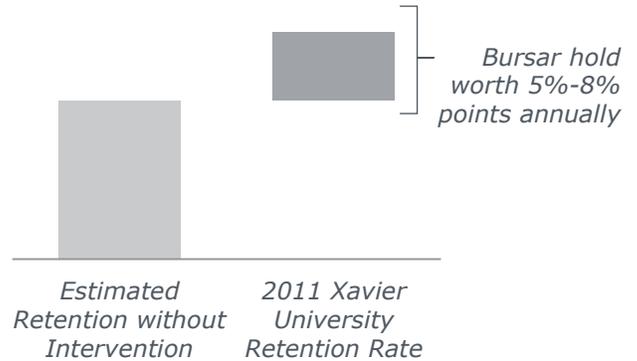
**Number of Students with Bursar Holds**  
Fall 2011



Greater than 50% reduction in number of students unable to register on time for spring semester

Nearly 90% of holds cleared before spring

**Estimated Impact on Retention**



**>\$2M** Collected in a two-month period by clearing undergraduate holds

In just the two weeks prior to registration, Xavier is typically able to reduce the number of students on bursar hold by over half. Nearly 90% of holds will be cleared before the start of the next semester. Xavier estimates that these efforts reduce attrition rates by 5 to 8 percentage points annually, and more than \$2 million dollars in revenue is collected in the two month period each year when the escalating intervention strategy is deployed.

While financial hold reconciliation was designed at Xavier University to support undergraduate students, the escalating interventions can be equally effective for

adult and online learners. Many COE students have exhausted financial aid eligibility or have additional competing priorities for their limited discretionary income. Micro-scholarships can serve as a critical way to cover unexpected costs associated with enrollment, and demonstrate the institution’s commitment to adult and online learner success.

Source: "Traditional Student Retention and Graduation Statistics," Xavier University Office of Retention and Parent Outreach; EAB interviews and analysis.

# Rationalizing the Service Pipeline

## Triage Requests to Improve Service and Protect Core Campus

**Online Support Center**  
 Monday-Friday 7AM to 7PM Mountain

Contact Us Today!



Start a LIVE CHAT

Phone  
 (208) 496-1800  
 (866) 672-2984

Email  
 onlinelearning@byui.edu

Text/SMS (USA Only)  
 (208) 557-4142

Request Information

Concerns/Complaints

Select Functional Areas Served

<i><b>Student Records</b></i>	<i><b>Bursar</b></i>	<i><b>Financial Aid</b></i>
Online registration help	Online payment "how to" help	Forward FAFSA forms
Wait-list prioritization	Payment tracking	Scholarship availability
Record office forms	Payment receipt	Aid counseling
Course authorization	Collection letters	Financial aid status
Registration holds	Financial holds	Aid disbursement

**Handled by Online Support Center**

- Routine requests
- Basic SIS access
- Minimal legal risk

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**Escalated to Campus Units**

- Specialized assistance
- Protected information
- Sensitive compliance implications

**Benefits**

- Preserves campus service unit time for the most advanced help requests
- Provides students a seamless single-point-of-contact experience

Navigating institutional administrative support resources can often be overwhelming for adult and online students, exacerbating paperwork confusion and overwhelming campus units with routine requests.

BYU-Idaho's Online Support Center balances responsiveness to student concerns with the need to protect the time of functional area professionals by employing highly trained student employees to serve as a triage point for administrative questions.

Student employees of the Online Support Center resolve routine requests and answer basic questions related to student records, billing, and financial aid. From 7 am to 7 pm Monday through Friday (as well as Saturdays at the start of each term), student employees answer questions about online course registration, forward financial aid forms or scholarship

information, and explain how to submit an online payment. Thirty-eight students are employed in the Center, with 3 to 5 students working per shift.

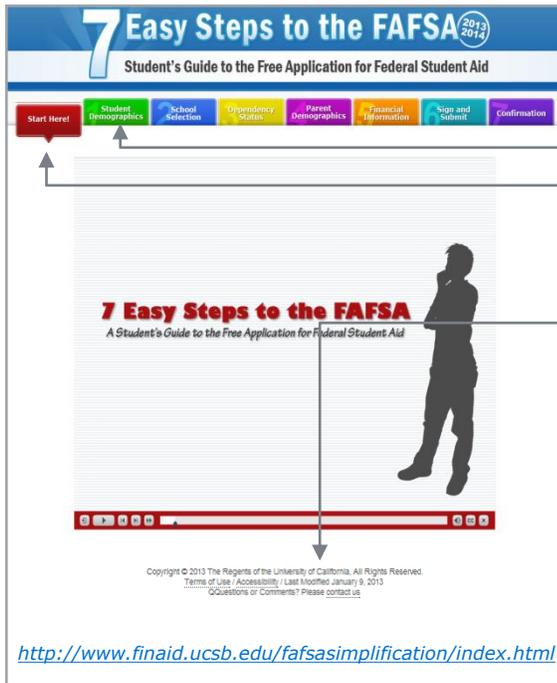
Student employees are trained to escalate complex or legally sensitive inquiries to the appropriate campus units. A student inquiring about aid disbursement or attempting to clear a registration hold is directed to a professional staff member or campus office.

The Online Support Center manages 3,400 contacts per month, providing students an efficient and effective single point of contact for most concerns and ensuring University staff spend time on only the most critical or complex cases.

Source: EAB interviews and analysis.

# A FAFSA How-To

## University of California, Santa Barbara's Video Walkthrough



- A series of 14 short videos featuring screen shots and voice-over narration provides in-the-moment support to students as they fill out their FAFSA
- An overview video walks students through how to acquire a PIN as well as information necessary for form completion
- "Contact Us" link at the bottom directs students to the financial aid office website to submit questions or call for more assistance
- Video is part of five UCSB video tutorials with others focusing on
  - IRS Data Retrieval Tool
  - California Dream Applications
  - How to Appeal
  - Renewing Aid

The Office of Financial Aid and Scholarships at University of California, Santa Barbara developed a series of video tutorials to further scale financial counseling and support beyond individual appointments and central triage. The most popular tutorial in the series is 7 Easy Steps to the FAFSA that includes screenshots and voice over narration to provide in-the-moment support to students as they complete the form.

Other videos introduce students to the IRS Data Retrieval Tool, a tool that allows students to access IRS tax return information to complete the FAFSA. Other tutorials in the series discuss why and how changes are

made to financial aid awards, provide overviews of specific scholarship or aid programs, and explain the process of appealing Financial Aid awards. All tutorials are housed on the Office of Financial Aid and Scholarships webpage and can be sorted by undergraduate, graduate, prospective students, or parents/guardians.

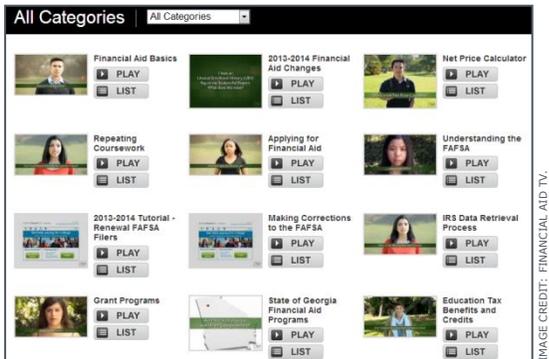
Institutions are welcome to link to the UCSB-developed tutorials on their own financial aid and student service websites: [www.finaid.ucsb.edu/fafsasimplification/](http://www.finaid.ucsb.edu/fafsasimplification/)

Source: The Regents of the University of California, "7 Easy Steps to the FAFSA: A Student's Guide to the Free Application for Federal Student Aid," 2013, <https://www.finaid.ucsb.edu/fafsasimplification/>.

# Financial Aid TV

## A Solution for the Overburdened Financial Aid Office

### Videos Assist with Counseling and Support



- Short, YouTube-like format
- Free to students and available 24x7
- Range of topics, including special link to videos and FAQs for adult and graduate students

### Diverse Range of Participating Institutions



- Subscription-based service
- Over 900 videos in library
- Option to create custom content and landing page

Financial Aid TV (FATV) offers institutions another means to provide engaging, self-service, web-based tutorials. Institutions subscribing to FATV's GetAnswers service gain access to a library of more than 900 short, YouTube-style videos on a variety of financial topics. The video library addresses a wide-range of topics including financial literacy, federal financial aid, and programs serving specific student populations.

Beyond the existing video library, subscribers can work with FATV to develop custom landing pages and custom videos on institutionally specific topics or issues. Additionally, FATV will work with institutions to integrate pre-existing, university-developed content into the FATV playlists.

Currently enrolled students can readily access information on critical financial questions at the exact moment when the information is most helpful, reducing the volume of one-off asks of institutional staff (especially during peak periods). Institutions also highlight the video tutorials in marketing campaigns given the number of financial questions and concerns raised by prospective students.

# Key Lessons to Monitor Financial Stop-Out Risk

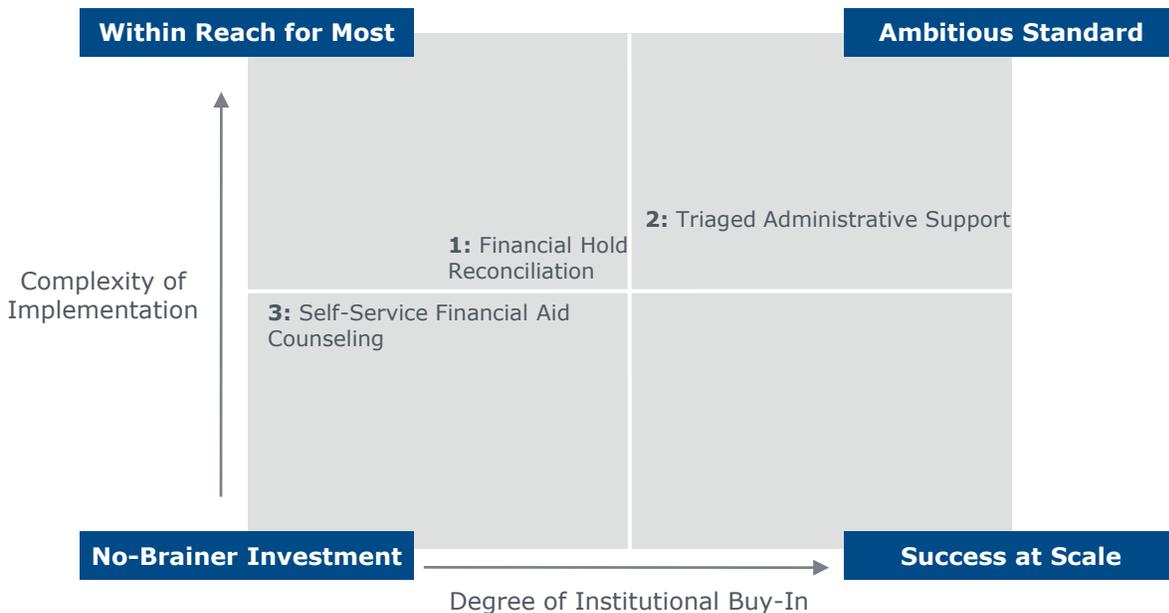
- 1** *Financial Hold Reconciliation*

Identify and resolve financial holds before registration deadlines to (a) ensure term-to-term re-enrollment and long-term persistence, and (b) target emergency aid to students in financial distress.
  
- 2** *Triaged Administrative Support*

Employ students and/or part-time professional staff to address routine requests and answer basic inquiries. Reserve on-campus staff for highest need or most complex administrative support cases.
  
- 3** *Self-Service Financial Aid Counseling*

Offer web-based, self-service tools to address the high volume of financial questions. Students are more likely to engage with multimedia videos and tutorials than to read FAQ documents.

Train advisors and peer coaches to refer students to self-service tools before escalating to financial aid counselors.





# Monitor Academic Stop-Out Risk

*Can I Make the Grade?*

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PART

2

- 4: Discussion Post Risk Tags
- 5: Faculty Tutorial Referrals
- 6: Risk Score Analytics

# Getting Lost in the Shuffle

## COE Students Often Deprioritized in Advising Structures

### Advisors Focus on Physically Present Students



#### Separate and Unequal

"Our faculty advisors barely keep up with updates to on-campus degree policies, let alone think about the unique needs of nontraditional students."

*Vice Dean, Private Research University*

While academic coaching and support is critical to promoting persistence among adult and online learners, existing structures for academic advising and support typically fail to meet the needs of COE students.

Campus offices, including advising, tutoring, writing, and math centers are overwhelmed by the 'tyranny of the immediate.' As one advisor lamented, "The most important question to answer is the one posed by the student in front of me." While many institutions are using tools and resources to support advisors with prioritizing interventions and triaging student needs, the current model almost always disadvantages the

adult and online learner who can't drop in.

Even advisors assigned to work specifically with adult and online learners often lack training or familiarity with the unique needs and circumstances of nontraditional student populations. Beyond understanding the academic, financial, and social risks experienced by these students, few advisors are familiar with programmatic requirements, aid eligibility, or other policies of continuing, professional, and online education units.

Source: EAB interviews and analysis.

# The (Transient) Face of the Institution

## The Dilemma of Part-Time Instructors

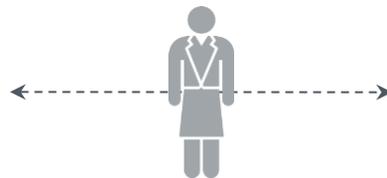
### Critical to Engagement...



Adult and online learners identify with faculty, rather than institution



Faculty already interacting with student while advisor waits to intervene



**Part-Time Faculty**

### ...But Already Overstretched



Classes often taught by working professionals



Little if any training in adult learning theory (andragogy)



Higher-than-average volume of email, discussion posts

Beyond the limitations of campus advising models, the difficulty of supporting the academic success of adult and online learners is made more acute by what can be called the dilemma of part-time instructors.

On the one hand, faculty are critical to the engagement of adult learners. Studies show that adults often identify with individual faculty members rather than the institution as a whole. Faculty are also most likely to surface student concerns given how much time students spend in courses relative to other activities. While advisors may have one hour-long session with a student at the start of a term, an instructor interacts with students multiple hours each week.

That said, faculty are already overstretched. In COE, classes are often taught by part-time faculty, working professionals who themselves may be on campus only a few hours a week, if at all. And whether part- or full-time, faculty have little if any training in adult learner pedagogy (andragogy)—so may not know how to connect with adult students to optimal levels. Instructors teaching online courses may have hundreds of students enrolled in each course, requiring significantly more time be spent on grading and instructional activities. Given these many demands on faculty time, how do we make it easier for faculty to help with retention efforts?

Source: EAB interviews and analysis.

# Surfacing Student Calls for Help

## Tagging Risk Guides Faculty to Students Most in Need

### Students Post Questions on Course Discussion Board



#### Questions for Instructor

**This Week's Problem Set** Posted 11/4/13, 1:12 pm



Joe  
Student

*"Help! I'm really struggling with this week's problem set. I tried over and over but I can't seem to get past questions 7, 9, and 12."*

**Re: This Week's Problem Set** Posted 11/5/13, 2:26 pm



Jane  
Faculty

*"Hi Joe – let's see if we can work through this. What components of the questions are giving you trouble?"*

### Multiple Checks Ensure Timely Faculty Response

Faculty respond to students in the "Questions for Instructor" section of course discussion board



LMS automatically searches for key phrases posted by struggling students, such as "help" and "over and over"



Quality assurance staff member checks search results for questions unanswered after 24 hours and alerts faculty member as necessary

While most instructors want to spend time addressing academic questions and concerns, those teaching multiple sections or hundreds of students may struggle to intervene in a timely fashion. Champlain College supports online instructors with identifying students most in need of academic intervention by highlighting "risk phrases" in students' online discussion board posts.

The institution developed a list of frequently used key words and phrases that signal academic risk, (e.g., *help!*, *tried over and over*, *frustrated*, *don't understand*). An automatic script identifies all instances

of the words in posts, and instructors are provided a prioritized list of students to proactively contact.

Instructors are eligible for a performance bonus of up to \$500 for fulfilling recommended student success interventions—including responding to posts identified through the discussion board risk tagging.

Central staff time is allocated to monitor the risk tags and instructor responses. Instructors are alerted to students whose questions have gone unaddressed within 24 hours.

# Making Realistic Demands on Faculty

## Monitoring Tutorial Referrals Among SUNY-ESC's Distance Students

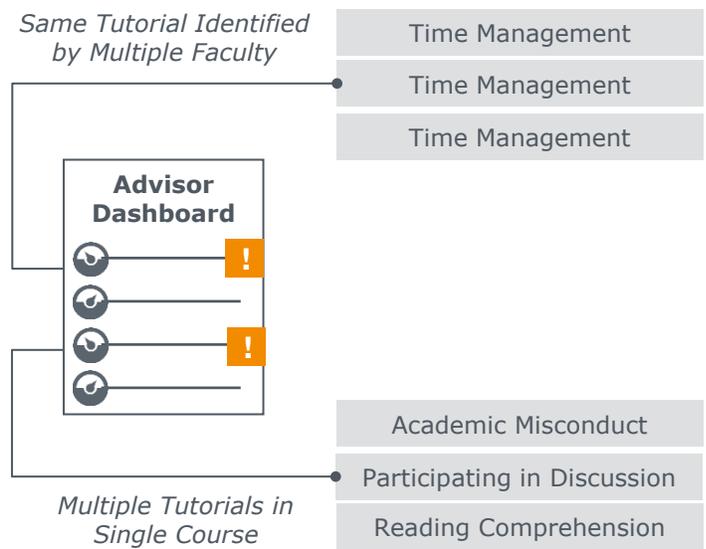
### Faculty Refer Students to Self-Paced Tutorials

Writing Skills
Basic Math
Time Management
Academic Misconduct
Participating in Discussion
Reading Comprehension



- 1 Instructor notices problem; discusses with student and enrolls in tutorial
- 2 Tutorial automatically appears in student's LMS
- 3 Instructor and advisor can track progress

### Multiple Referrals Trigger Advisor Intervention



SUNY Empire State College, an institution with a strong majority of online students, has also built academic support directly into the LMS. Empire State faculty developed a series of web-based, self-paced tutorials on academic topics. A faculty member can refer a student to tutorials based on graded assignments, classroom observation, or office hour conversations.

Self-paced tutorials address common academic readiness and developmental topics, including writing skills and basic math, time management, and reading comprehension, as well as active participation in discussion and issues of academic misconduct.

Instructors enroll a student in the appropriate tutorial, at which point a notification appears in the student-view of the LMS. The instructor and any advisor, if

there is a second person supporting the student, can see all the tutorials that have been sent to the student.

Two conditions trigger additional intervention. If the same tutorial (e.g., time management) has been flagged by multiple instructors, then an advisor intervenes. Or, if a single faculty member refers a student to multiple tutorials on different topics, then an advisor intervenes.

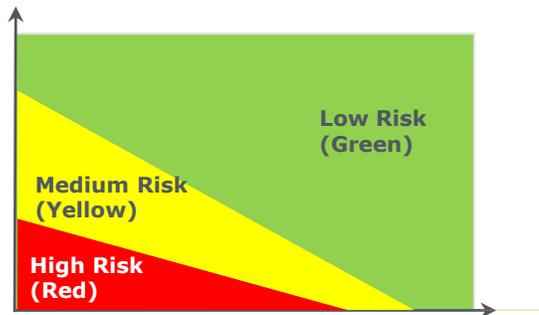
In the cases of both Discussion Post Risk Tags and Faculty Tutorial Referrals, instructors are given a way to spend scarce time with students who are most in need and most at risk while simultaneously improving communication and coordination with professional advising staff.

Source: EAB interviews and analysis.

# Calculating Risk from LMS Scores

## Determining Intervention Needs Without Self- or Faculty Identification

**Predictive Modeling Metrics**  
(Illustrative—Synthesis from Multiple Universities)



### Past Performance

- High school GPA
- Standardized tests
- Prior-term GPA (if enrolled)

### Zip Code

- Predicts socioeconomic status

### Usage Metrics

- Number of log-ins, page views
- Number and length of online postings
- Minutes spent on course website
- Practice quiz attempts

A growing number of institutions are looking to scale academic risk identification and intervention beyond individual faculty effort. Rather than rely on timely submission of academic alerts and continuous monitoring of student behavioral patterns, progressive institutions are developing algorithms to predict the risk of attrition using historical records, demographic data, and LMS usage metrics.

Predictive risk modeling offers three advantages to the institution. First, algorithms leverage the vast stores of data already collected within online learning environments. Data gleaned from enrollment and admissions information can be paired with in-course activity data, including the number of log-ins and page views, number and length of online postings, minutes

spent on the course website, and attempts at practice quizzes or other formative assessments embedded in the online course environment.

Second, risk scoring reduces the time and effort required from faculty, enabling instructors to reduce total workload, focus energy on supporting highest risk students, and intervene earlier in the semester.

Finally, risk scoring allows for automated intervention and communication with students. Students whose risk score indicates escalating risk may be automatically enrolled in a self-paced tutorial or sent an email recommending that they schedule an advising appointment.

## Advantages of Automation

### 1 Leverages Existing Data

Automation relies primarily on data already being collected at the university

### 2 Reduced Faculty Burden

Total workload for instructors is reduced and can be pulled forward to before the semester

### 3 Automatic Intervention Communications

Risk levels triaged electronically, triggering automated intervention messages

Source: EAB interviews and analysis.

# A Simplified Approach to Scoring Risk

## Rio Salado College Calculates Risk Based on Easy-to-Track LMS Activity

### Keeping It Simple



#### RioPACE Student Risk Score Generator

Previous Model:  
30 Variables

1. Past enrollment patterns
2. LMS activity logs
- ...
30. Current enrollment status

Current Model: 4  
Variables

- Log-in activity
- Recent site activity
- Pace in course
- Current course load



**Four-variable model found to be a better predictor of student risk than prior 30-variable analysis**



#### Don't Overlook the Obvious

"The best predictor of online course completion and success is whether the student logs in and takes all the exams. It's not rocket science, and we already have that data."

*Director of Academic Support Services  
Public Research University*

Developing a predictive risk algorithm can seem out of reach for many institutions, especially for independent continuing, professional, and online education units.

However, all units can adopt a practical approach to risk scoring like the RioPACE (Progress and Course Engagement) model from Rio Salado College. Rio Salado scales down the typical multivariate analysis to focus on four, easy-to-track but highly predictive variables.

Launched in 2011, the RioPACE risk score is based on LMS log-in activity, recent site activity, pace in course (i.e., completion of required assignments and grades), and the student's current course load.

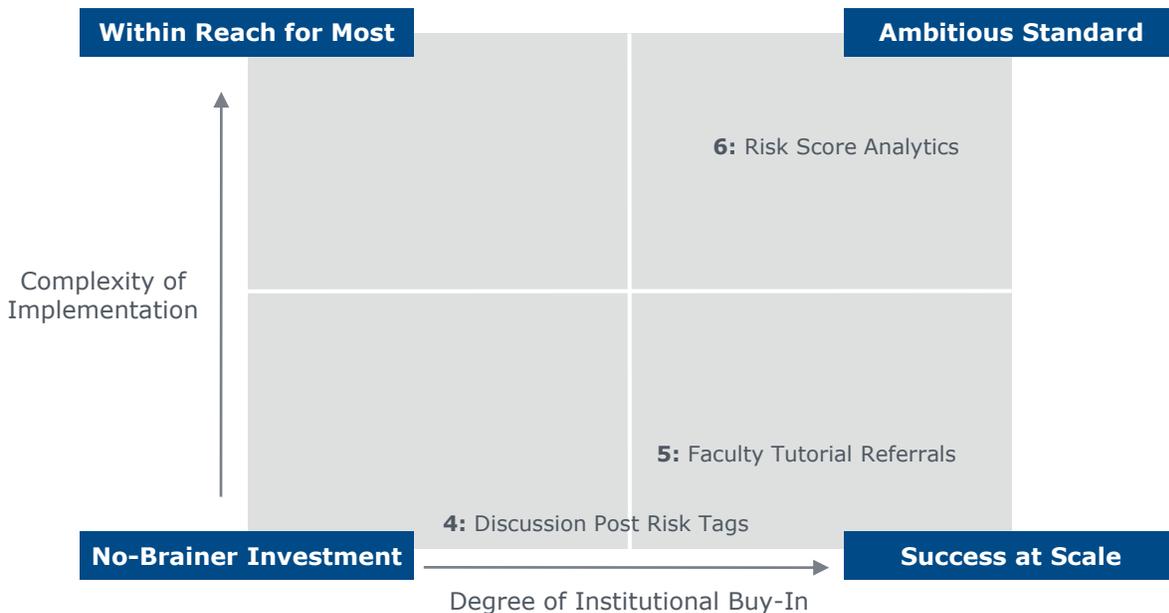
The model is updated weekly to reflect activities and grade information, and was built to run automatically within the institution's LMS.

Risk scores are displayed to the instructor next to the students' names on the course roster; hovering over a student's score provides information on log-in frequency, site engagement, and pace. Instructors can then choose how best to intervene with students based on the score and underlying data.

Source: Rio Salado College and Learning Analytics, [http://www.riosalado.edu/web/selfStudy/Rio%20SaladoCollege%20Self-Study%202012/Resource%20Room%20Documents/Self-Study%20Criterion%203/RioPacePredictiveAnalyticsModel\\_June%202011.pdf](http://www.riosalado.edu/web/selfStudy/Rio%20SaladoCollege%20Self-Study%202012/Resource%20Room%20Documents/Self-Study%20Criterion%203/RioPacePredictiveAnalyticsModel_June%202011.pdf); EAB interviews and analysis.

# Key Lessons to Monitor Academic Stop-Out Risk

- 4** *Discussion Post Risk Tags* Monitor discussion board posts for high-risk words and phrases to prioritize instructor and counselor intervention. Particularly effective in high-enrollment courses and with fully online students.
- 5** *Faculty Tutorial Referrals* Embed academic tutorial referrals into LMS environments to more quickly and consistently intervene with students, and to increase coordination between instructors and advising staff.
- 6** *Risk Score Analytics* Monitor and analyze a discrete number of demographic and behavioral inputs to provide actionable insight into student's predicted level of academic risk.





# Monitor Engagement Stop-Out Risk

*Can I Make It Work?*

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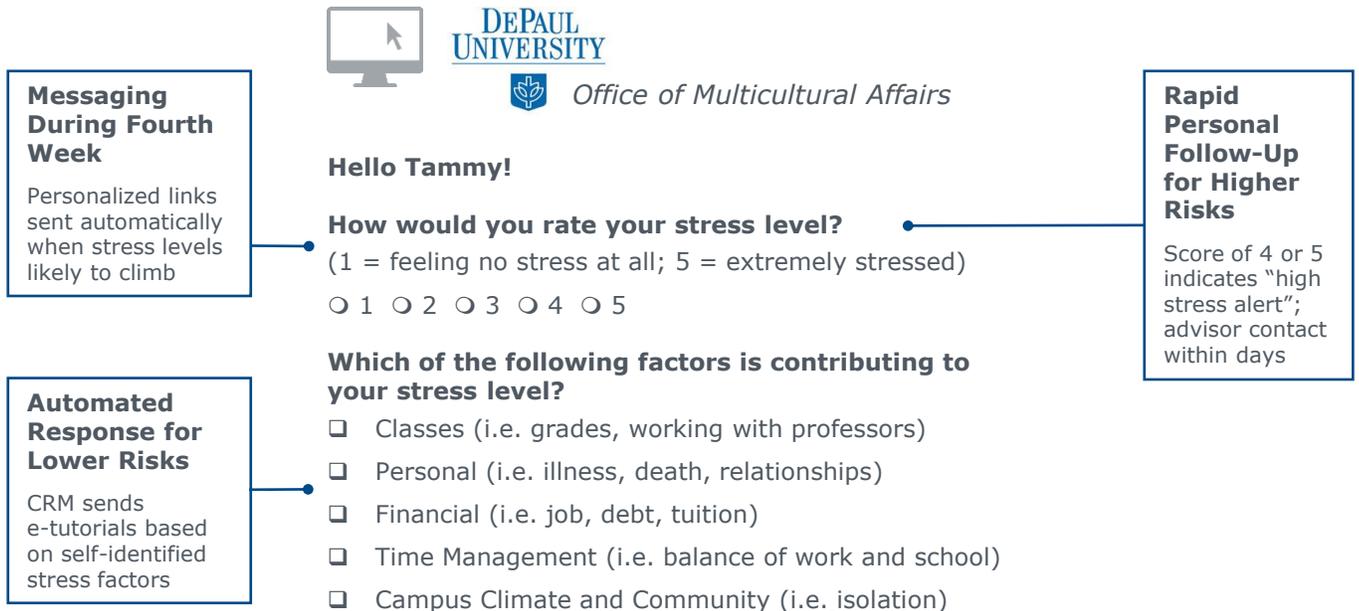
PART

- 7: Midterm Stress Questionnaire
- 8: Practical Community Engagement

3

# Before Stressed Out Becomes Dropped Out

## DePaul University's Mid-quarter Stress Questionnaire



For many adult and online learners, the first sign of escalating academic and financial risk is an overall feeling of stress. DePaul University recognized that the midpoint in a term was a peak period for student stress and disengagement. To identify students at highest risk and provide them support, the Office of Multicultural Affairs developed a short, voluntary questionnaire to gauge a student's stress at mid-quarter.

Students receive a brief email asking them to rate their current level of stress on a scale from 1 to 5. They are then asked to indicate the factors contributing to their current stress level. Students are encouraged to select all factors that apply.

For lower-risk students—those scoring a 1 to 3 on the Likert scale—the university's CRM sends an automated

response that highlights appropriate e-tutorials or links to campus resources related to the factors contributing to the student's stress level.

A student indicating a low level of academic stress might be sent resources on academic advising or study skills and time management. Students who indicate that they are struggling to acclimate to the campus climate and community might be provided referrals to peer mentoring programs, the campus counseling center, or a list of student groups and organizations.

For students who might be hesitant to seek out resources on their own, the use of an automated message is seen as a non-judgmental, non-invasive way to provide support.

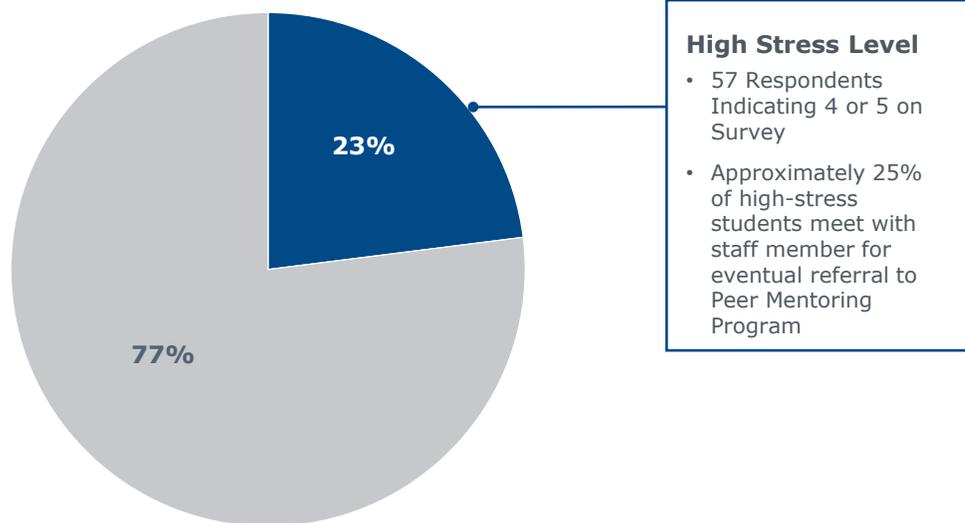
Source: EAB interviews and analysis.

# Rapid Response

## Personal Intervention for Students with Self-Reported High Levels of Stress

### Student Stress Levels at Mid-Quarter

Among ≈250 Survey Respondents



Higher-risk students who report a current stress level of 4 or 5 receive rapid, personal follow-up from a staff member in the Office of Multicultural Affairs. The staff member contacts the student by phone within a few days of the submitted survey.

During a recent semester, approximately 250 students completed the voluntary survey. Seventy-seven percent of respondents had a low stress level, while 23% of respondents were at high risk. Of the 57

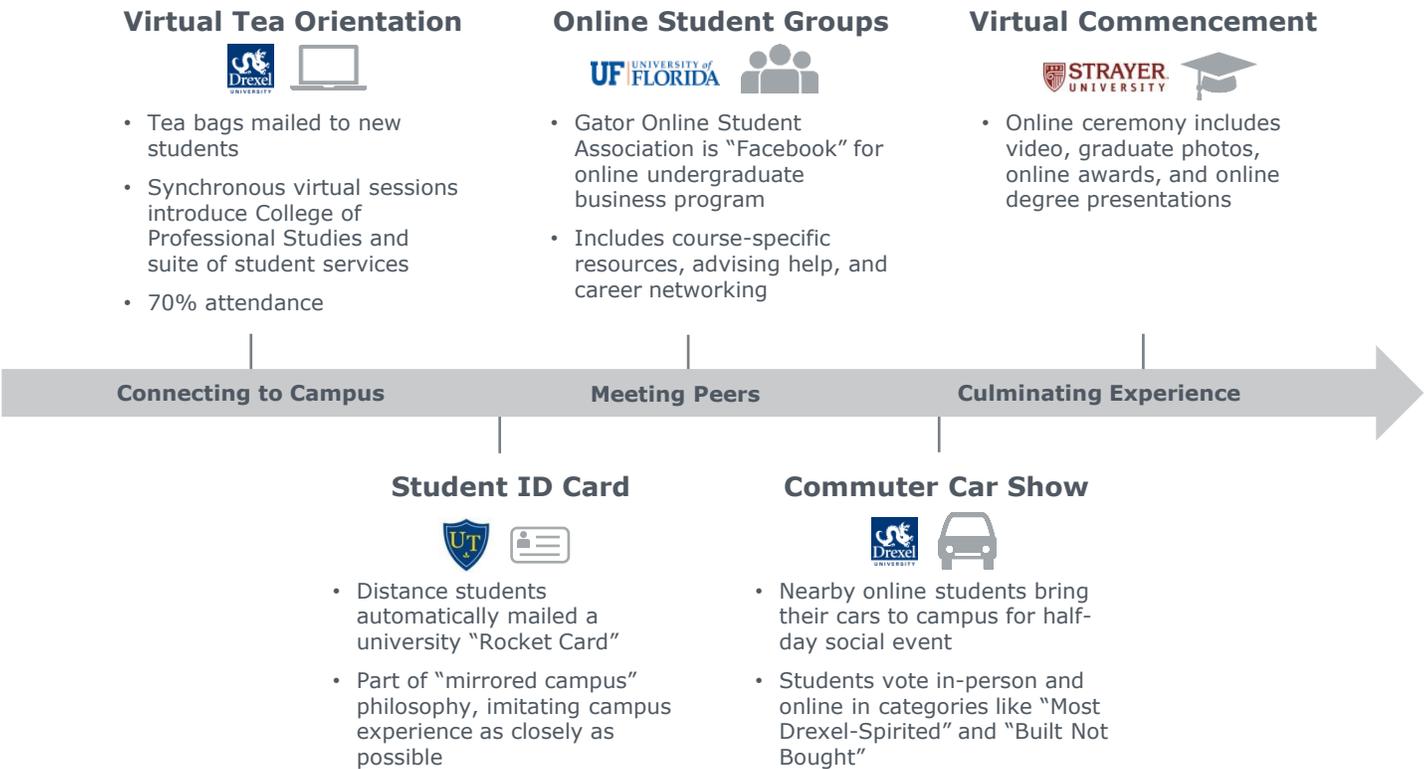
students indicating a stress level of 4 or 5, 25% met with staff and were referred to a peer mentoring program for continued support.

Personalized follow-ups are critical to preventing students from stopping out. Office of Multicultural Affairs staff have identified students actively considering withdrawing from the institution. Following the intervention, many of those students feel they now have the support and resources required to persist.

Source: EAB interviews and analysis.

# Re-imagining the Residential Campus Experience

Easy, Low-Cost Wins to Foster Engagement with Adult and Online Learners



Building relationships with peers, instructors, and campus staff is important to promoting persistence among all students, but creating community and connection to campus is perhaps especially critical when serving adult and online learners who do not benefit from the residential experience.

COE units and institutions can replicate key aspects of the campus experience for adult and online learners—a philosophy the University of Toledo calls "mirrored campus"—by creating signature events and activities across the term and year.

Drexel University hosts a Virtual Tea Orientation to welcome online first-year students and provide an overview of student support services. Seventy percent of first-year students attend. Later in the academic year, online students might choose to attend the Commuter Car Show, a half-day social event that aims to bring students who do not live on campus.

The University of Toledo and the University of Florida replicate aspects of the on-campus student experience. Toledo online learners receive the school's student ID card in the mail, while University of Florida online undergraduate business students may join the student-led Gator Online Student Association (GOSA). GOSA not only offers campus leadership opportunities to online students but creates an incredibly important peer support network.

Graduates of Strayer University's online programs participate in an online graduation ceremony. In fact a growing number of institutions host virtual commencement or include adult and online learners in university commencement ceremonies.

Source: EAB interviews and analysis.

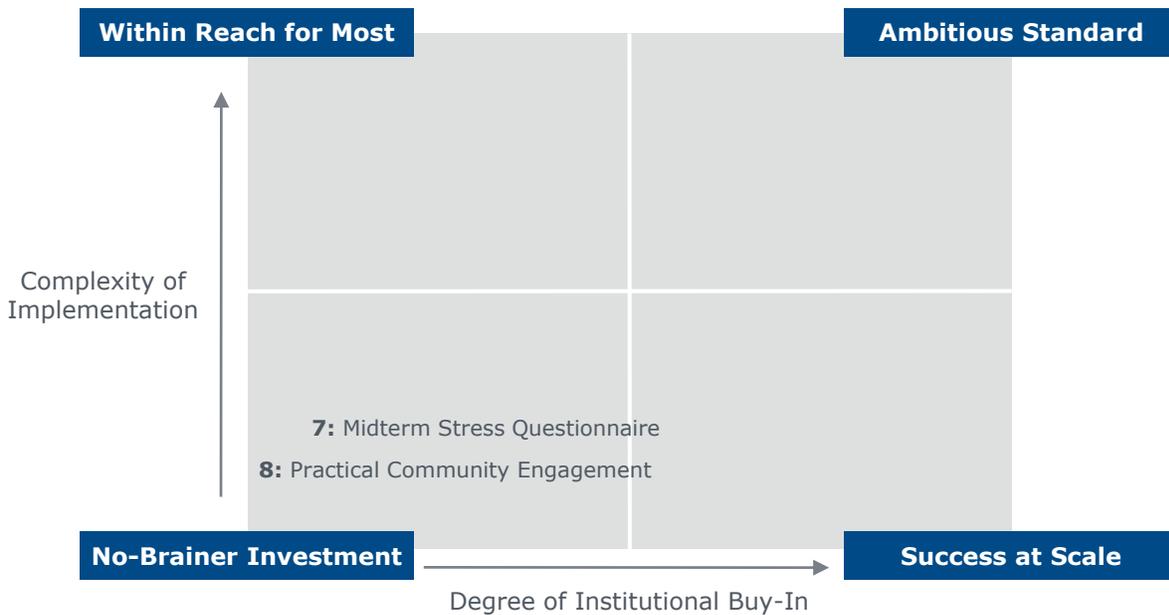
# Key Lessons to Monitor Engagement Stop-Out Risk

## 7 *Midterm Stress Questionnaire*

Invite students to complete a mid-quarter or mid-semester survey of student stress and engagement levels. Send a list of campus resources and services to those with lower risk and intervene with students self-identifying as high risk.

## 8 *Practical Community Engagement*

Recreate or tailor parts of the “traditional” campus experience, when appropriate, to foster inclusiveness and sense of belonging among nontraditional students.







# Encourage Re-enrollment

Term-to-Term Persistence and Post-Stop-Out Restarts

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PART

- 9: Escalating Re-enrollment Outreach
- 10: Proactive Re-approach Campaign

4

# Preventing Stop-Outs Before They Occur

## Increasing Term-to-Term Persistence

### By Week 3



#### Registration Census

- Lists students registered for a current class but not a future class
- Focuses on graduate students

### By Week 4



#### Templatized Email

- Students receive reminder to re-enroll
- Links to financial aid and other resources

### By Week 8



#### Personalized Calls

- School-specific counselor outreach complete
- Follow-up with automatic "last chance" email



Certainly some stop-outs are unpreventable, but in many cases the impulse to stop-out stems from something seemingly minor like acquiring the right textbook or finding an alternative section time.

Regis University's School of Professional Studies monitors a list of currently enrolled graduate students who are not registered for future courses. The graduate registration census is reviewed during the third week of every term.

Un-enrolled students receive an email reminding them to re-enroll. After the email campaign, the number of un-enrolled students in Fall 2013 dropped from 1,062 to 811.

Following the email campaign, remaining unregistered students receive a phone call from a re-enrollment

counselor assigned to support specific graduate programs or clusters. In this term, after the personalized calls an additional 579 students registered.

As a result of this outreach, an additional 830 students enrolled at Regis. With a conservative estimate of \$1,500 per course, the practice yielded \$1.1 million in tuition revenue.

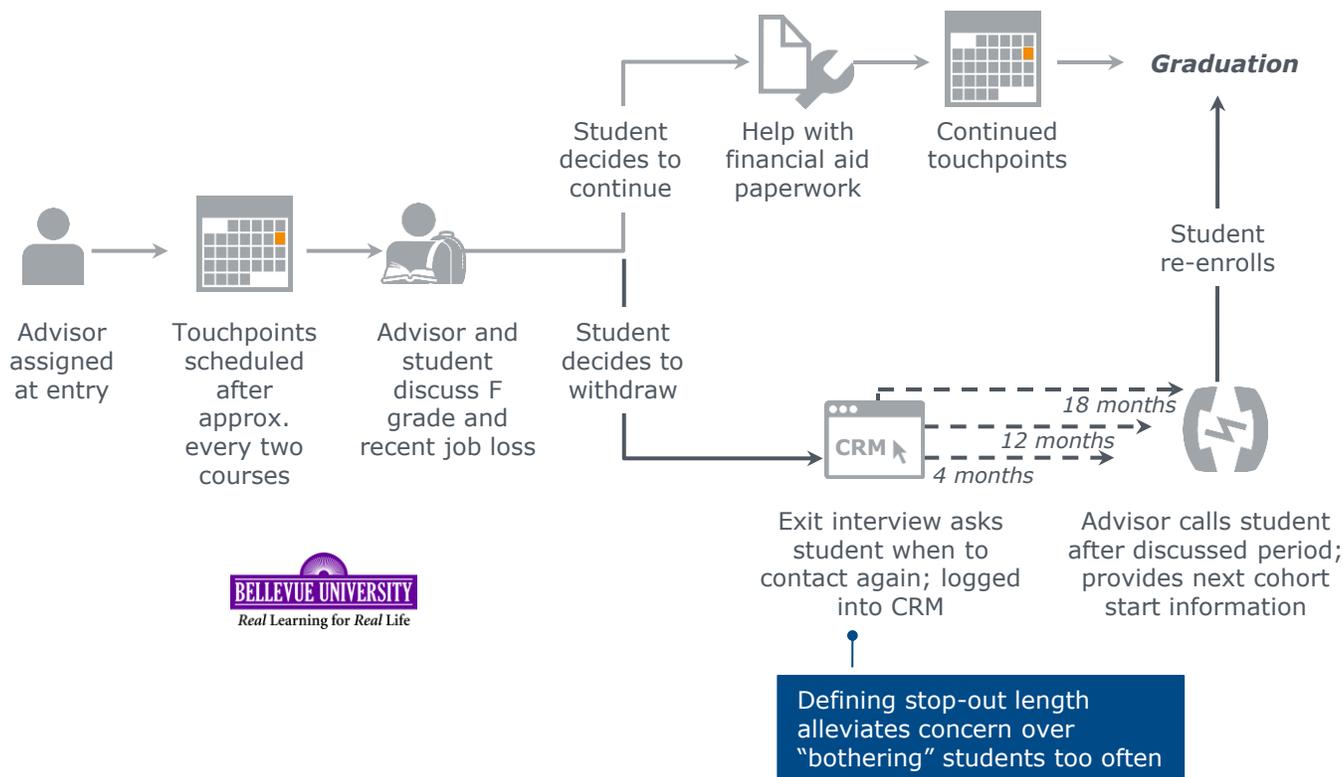
When re-enrollment counselors are not calling current students to remind them to register for the next term, they are calling "step-outs"—those students who have been out for one semester—as well as stop-outs who have been un-enrolled for at least a year.

1) Data from first eight-week term of Fall 2013.

Source: EAB interviews and analysis.

# Securing Permission to Re-Approach

Bellevue University's Support Tracking System (*Illustrative*)



Recognizing that some students will still need to step away for a period of time, Bellevue University secures students' permission to re-approach them at a future date. Each student at Bellevue is assigned an advisor at entry who checks in with him or her after every two courses. Advisors monitor student progress and can proactively intervene if there is an indicator of risk. For example, an advisor might see a low grade on a transcript and learn that the student has recently lost a job or experienced a family emergency that negatively impacted academic performance. In this moment, there are two different paths this student might take.

Ideally, the student would decide to continue their studies. More likely, however, the student will decide to withdraw. The Bellevue advisor conducts an exit interview before the withdrawal date and asks the

student when they want to be contacted by Bellevue again—in other words, the student is asked to estimate the length of their stop-out period.

Bellevue has found the estimated stop out length to vary considerably—from four months to two years. No matter the length of time, the advisor logs it into the CRM and sets an automated reminder to call the student after the discussed period.

Defining the stop-out length alleviates concern over "bothering" students too often, and the institution is also better allocating advisor time to call students only when they are most ready to return.

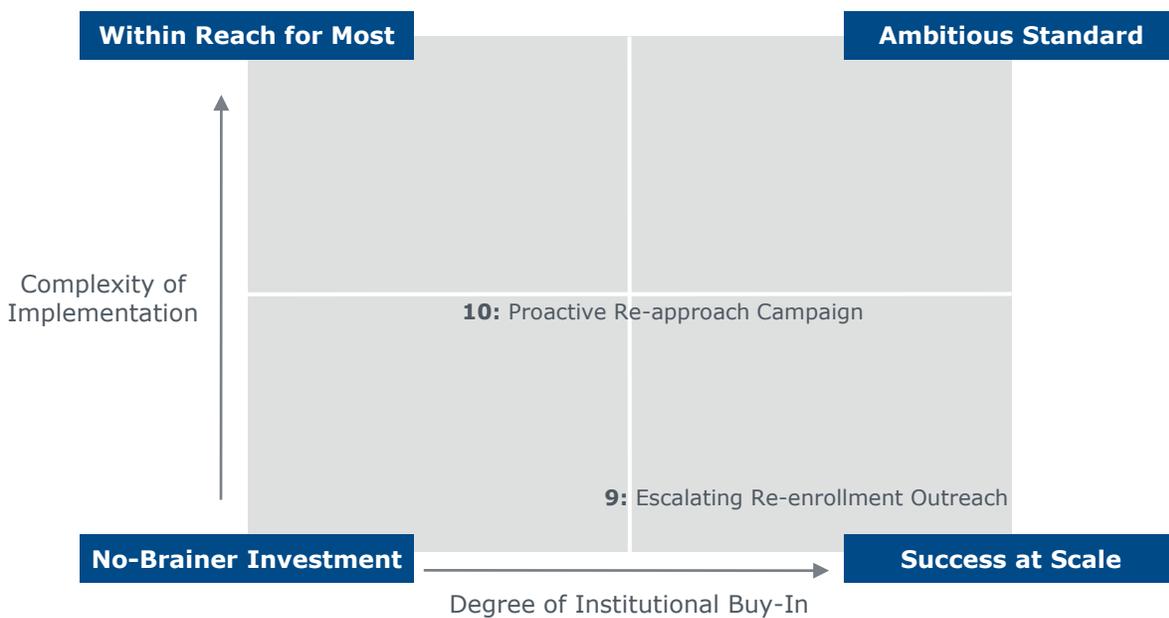
The program has enjoyed tremendous success. Since implementation in 1997, more than 5,000 students have been contacted, 2,600 have re-enrolled, and more than 1,850 returning students have graduated.

Source: EAB interviews and analysis.

# Key Lessons to Encourage Re-Enrollment

**9** *Escalating Re-enrollment Outreach* Target registration reminder emails to those students who have not registered for the next course in a program sequence. Use multiple communication channels to maximize response rate.

**10** *Proactive Re-approach Campaign* Identify students with planned stop-outs during end-of-course evaluations or next term registration appointments. Secure permission for counselors to phone and/or email before an agreed upon re-admission date.





# Facilitate Adult Degree Completion

Simplify Readmission and Create Financial Incentives

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PART

5

- 11: Expedited Re-admit Procedures
- 12: Second Opportunity Financial Incentives
- 13: Statewide Completion One-Stop Shop

# The Best Hope for National Completion Goals

## Foundations and Governors Pin Hopes on Degree Completers

### Lumina Leads the Completion Charge



Percentage of Americans with "high-quality degrees or other credentials"



### States Add Their Own 2025 Pledges

- **Colorado** plans to double the number of degrees produced in its state system
- **Arkansas** pledges to double the total number of degree holders in the state
- **Tennessee** plans to increase its degree-holder rate to the national average

#### Nontraditional Students are Non-negotiable

"While the specifics and timeframes of these goals may differ, one thing is true across the board: none of them will be met by only improving the 'traditional' education pipeline. States and institutions will also have to increase the number of adults who earn a postsecondary degree."

*Patrick Lane, Demaré K. Michelau, and Iris Palmer  
WICHE/HCM Strategists*

Ambitions to increase the postsecondary attainment rate in the United States hinge on the ability of universities and colleges to enroll (and in most cases re-enroll) adult learners who have not yet earned an associate's or bachelor's degree. The Lumina Foundation's 2025 goal states that 60% of all US adults will earn a high-quality degree or credential by 2025. Many governors have set similarly ambitious goals to increase the educational attainment rates within their states. Governors in Colorado and Arkansas have called for a doubling of degrees produced in the state

system or a doubling of degree holders in the state. Tennessee's Drive to 55 campaign states that 55% of all adults in the state need to have a degree or credential.

The challenge is that as of 2010 only 38% of US adults had earned a high-quality credential. With a growing emphasis on the role certificates might play in increasing that figure, eyes are increasingly on COE units to meet national completion goals.

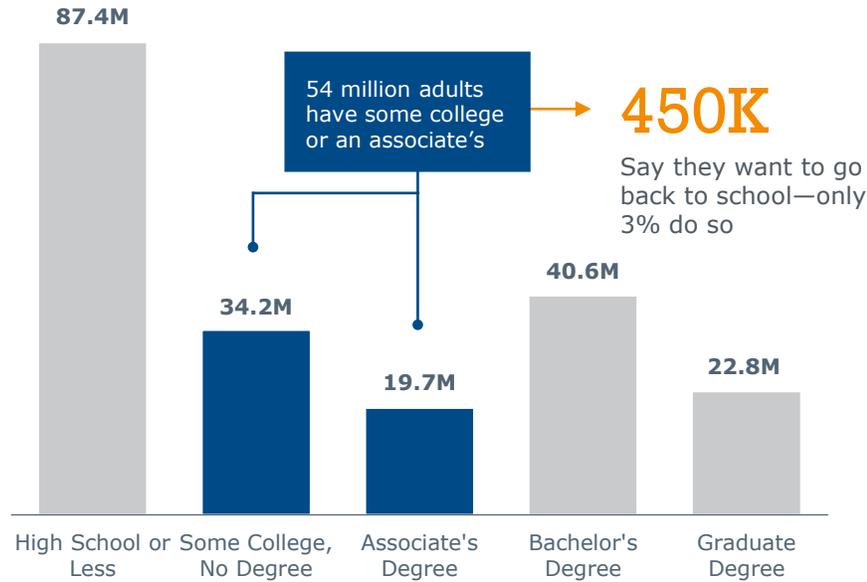
Source: WICHE, "Going the Distance in Adult Degree Completion: Lessons from the Non-Traditional No More Project," <http://www.wiche.edu/info/publications/tnmStateCaseStudies.pdf>; EAB interviews and analysis.

# A Second Chance for a College Degree

54M Adults Have Completed Some College, but Not a Bachelor's Degree

## The Degree Completion Opportunity

U.S. Population by Education Level



## Yesterday's Dropouts, Tomorrow's Clientele

1.8M

... undergraduates start at 4-year institutions every year



450K

... will have dropped out or transferred to a 2 year within six years, **becoming potential degree completers**

Fifty-four million adults in the United States have completed some college but not attained a bachelor's degree. Of those, 19.7 million have earned an associate's—a credential most agree should be considered a high-quality degree for the purposes of record-keeping—leaving a degree completion market of approximately 34 million US adults.

Half of the 54 million adults with some college but no bachelor's indicate an interest in returning to higher education; however, only 3% of them currently do so.

The financial barriers seem too high, the time required seems too much, and the question of academic readiness weighs too heavily on many adult learners' minds.

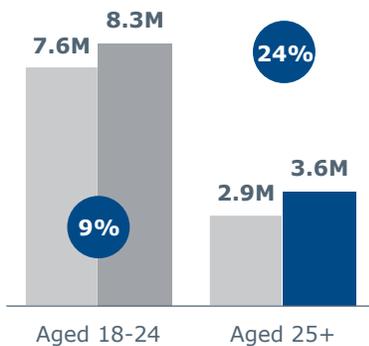
The number of prospective degree completion students also grows each year, as 450,000 of the 1.8 million first-time, full-time students will drop out or transfer to a two-year institution with six years.

Source: National Student Clearinghouse Research Center, "Completing College: A National View of National Attainment Rates," November 2012, [http://nscresearchcenter.org/wp-content/uploads/NSC\\_Signature\\_Report\\_6.pdf](http://nscresearchcenter.org/wp-content/uploads/NSC_Signature_Report_6.pdf); U.S. Census Bureau, "Educational Attainment in the United States: 2012." National Center for Education Statistics, Digest of Education Statistics 2012, <https://www.census.gov/hhes/socdemo/education/data/cps/2012/tables.html>; EAB interviews and analysis

# Adult Degree Completers

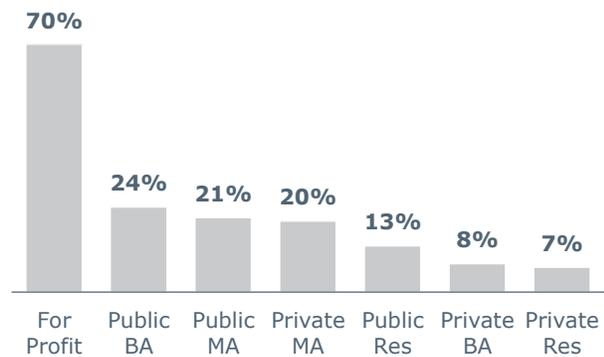
## Growth to Outpace 18 to 24 Year Olds

Growth in Four-Year Undergraduate Enrollment by Age, 2011-2021



## For-Profits Still Dominate Adult Market

Median Percentage of Adult Undergraduates by Sector



## Market Undersaturated Despite Anticipated Growth

**54M**

U.S. adults with some college but no bachelor's degree

**50%**

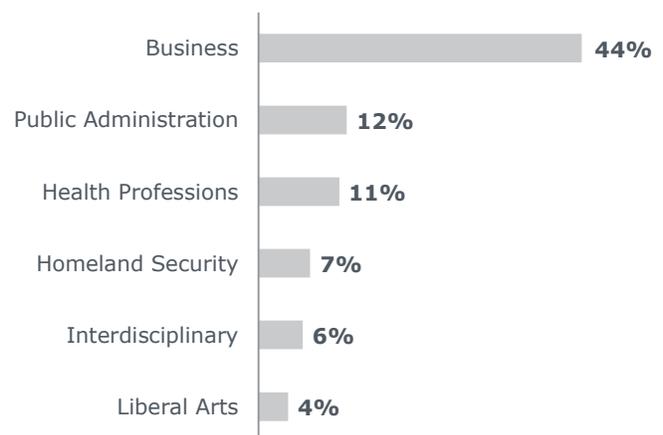
Proportion who would return to school if it were more convenient

**3%**

Proportion of students with some college who return to school

## Degree Interests Overwhelmingly Professional

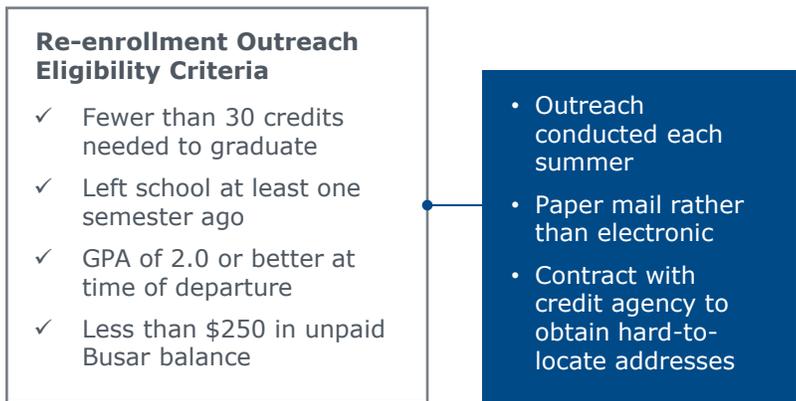
Undergraduate Completions at Adult-Friendly Institutions



Source: National Center for Education Statistics Census Bureau, <http://nces.ed.gov/pubs2013/2013008.pdf>; EAB analysis.

# Removing Obstacles to Re-admission

## Re-enrolling Stop-Outs Through UNM’s Graduation Project



### Easing the Re-entry Process

-  Simplified, no-fee re-enrollment application
-  Offer up to \$750/semester in grant aid

### Preventing Future Stop-Outs

-  Override enrollment caps in required courses
-  Closely monitor registrar and bursar holds
-  Biweekly email and phone check-ups

Even if we set up opportunities to re-approach students, there is still a need to simplify the re-enrollment process. The University of New Mexico developed an institution-wide campaign to reach out to students who had left the institution before earning a degree. The campaign targets “near completers” or those that left UNM at least one semester prior with a GPA of 2.0 or higher, owing less than \$250, and having made substantial progress toward a degree.

UNM thoughtfully considered how to reduce the bureaucratic hurdles associated with re-enrollment that might be reducing the likelihood that a student return.

They developed an expedited readmission process that includes a transcript review and assessment of credit

for prior learning. There is no fee re-enrollment application, and there is an opportunity to receive grant aid of up to \$750 (roughly the cost of one 3-credit hour course). UNM also works to override course enrollment caps in critical courses near-completers require for graduation, working with faculty to find extra course seats whenever necessary.

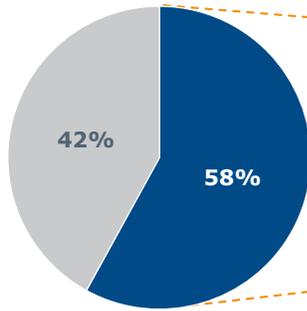
Re-enrollment benefits are highlighted in UNM’s print mail campaigns. One of the barriers to reaching degree completion prospects is that contact information is often incorrect or out-of-date. UNM partners with the credit agency Experian to ensure current mailing address.

Source: EAB interviews and analysis.

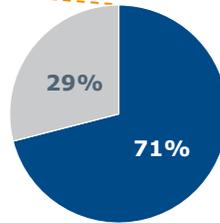
# A Decade of Degree Completion

## UNM's Graduation Project, First 10 Years

### Re-enrollment Rate



### Graduation Rate



### 1,850 Additional Graduates



- Majority of beneficiaries are transfers or outside the six-year window
- Hundreds of graduates only needed help with paperwork, not additional coursework

In the first decade of University of New Mexico's Project Graduate, 2,600 students have re-enrolled out of pool of 4,500 prospects. Of those 2,600 students, 1,850 have graduated. Most completers fell outside the six-year graduation window monitored by the federal government, so UNM does not receive a lift in its federally reported graduation rates. That said, the benefits of serving these students certainly aligns with the institutional mission and provides a financial benefit as well.

UNM noted that many near completers had failed to graduate due only to paperwork issues. Some students had failed to apply for graduation or needed to resolve a bursar hold in order to officially complete. One recommended policy change UNM and others are considering is switching graduation requirements so that students "opt-out" rather than "opt-in" if they've met all graduation requirements.

Source: EAB interviews and analysis.

# Addressing Academic ‘False Starts’

## UA College of Continuing Studies Brings Students Back to Bama



**Back to Bama Eligibility Criteria**

- ✓ Attempted at least 15 semester hours at UA
- ✓ Left school at least two semesters ago
- ✓ Have not earned an undergraduate degree
- ✓ No academic or financial holds

- Single point of entry for 600+ programs
- Attracts in-state and nonresident students
- Re-engagement beyond course completion

### Focus on Financial Feasibility



Simple scholarship form for all returning students



First class offered free

### Academic “Clean Slate”



Eligible students left UA more than 3 years ago



Transcript assessment if GPA less than 2.0



Courses remain on transcript but don’t affect new GPA

The College of Continuing Studies at the University of Alabama has designed a re-enrollment campaign known as “Back to Bama” that targets students who suffered from an academic false start. These students have completed fewer than 15 student credit hours (SCH) at the university before dropping out. Students left the institution at least two semesters prior and must have no academic or financial holds.

The College of Continuing Studies provides these returning students with a single point of entry for the institution’s more than 600 flexible and online completion programs. Many students who started in a residential campus program opt to complete in a new online or multimodal program instead.

Like UNM, the University of Alabama provides incentives to students who choose to re-enroll. Students are invited to enroll in their first course back at no charge and are eligible for scholarships and financial support. All students can opt to participate in the institution’s academic clean slate policy, which allows the student’s GPA to reflect only new courses (previous coursework remains on the student’s transcript but appears as Pass or Fail).

Source: EAB interviews and analysis.

# Focus on Financial Feasibility Yields Early Returns



## Back to Bama' Results

16 Spring, Summer, and Fall Terms



**3-6 Hrs.**

Typical amount of credits completed by recipients



**37.6**

Awards per term



**\$1,000**

Average award value



**600**

Total awards given out

Students must take three courses (9+ Hrs.) for institution to recoup financial investment

To date, most participating students are near completers rather than students who suffered academic false starts. That said, the College of Continuing Studies has awarded 600 financial awards to returning "Back to Bama" students. The average financial award amount is \$1,000 allocated as a one-time discount to incent re-enrollment.

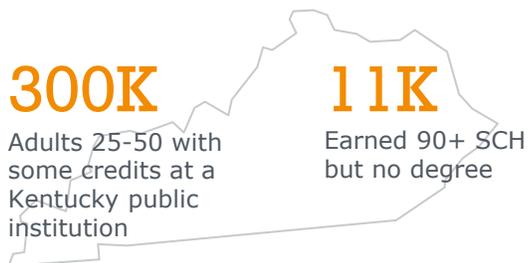
To recover the cost of the initial free course, students need to complete three courses or 9 SCH. And, while many near completers may require only one or two courses, the vast majority of students the program intends to serve will easily enroll in sufficient credit hours for the program to break even.

Source: EAB interviews and analysis.

# One-Stop Shop for State's Near Completers

## KnowHow2GOKy and Kentucky's Project Graduate

### A Sizeable Opportunity



### Incentivizing Re-entry

-  Simple application
-  Tuition assistance
-  Priority enrollment
-  Individual advising

Given the emphasis governors and state legislatures are placing on increasing statewide completion, the Kentucky Council for Postsecondary Education designed a collaborative campaign to support adult degree completion called Project Graduate.

Project Graduate included a one-stop-shop online portal, called KnowHowtoGoKy, to reach the more than 300,000 adult residents between the ages of 25 and 50 who had some college credit from a Kentucky public institution but no degree. Of the 300,000 targeted, 11,000 students had earned 90+ SCH. This population of near completers was the initial target audience for the Council's efforts.



### A Coordinated Effort



- Launched Fall 2008
- Single statewide brand, one stop portal
- 8 publics, 10 private participate
- Targets adults with 80+ hrs completed
- Campus advocates
- Campus action plans, incentives

Public institutions in the state of Kentucky have a designated representative who determines the incentives—both financial and academic—that the university will offer to re-enrollees. Some institutions have focused on priority registration status, others a free application, while still others focus on tuition assistance and debt counseling.

The initial success of the effort led to participation by 10 private colleges and universities across the state as well.

Source: Project Graduate, Kentucky Council on Postsecondary Education, <http://cpe.ky.gov/committees/collegeaccess/projgraduate/>; EAB analysis.

# Building Graduates and Goodwill

## Project Graduate Results 2008-2011



### 2,000+ Enrollments

Increased **97%** over three years



### 873 Graduates

Increased **510%** over three years



### Tuition Revenue

More than **\$12 million** across 8 participating public universities



### New Qualified Leads

All campuses report increases in inquiries and re-admits from other adults for continuing education

\$60,000 investment from the Kentucky Council on Postsecondary Education supported campus implementation equates to \$69 per graduate



Between 2008 and 2011, the Kentucky Council on Postsecondary Education's Project Graduate supported more than 2,000 enrollments across participating public and private institutions. So far, 873 students have graduated, and more than \$12 million in tuition revenue has been generated just among public institutions.

An additional positive consequence of the campaign has been an increase in inquiries and qualified leads for the institution's other professional, continuing, and

graduate education offerings. Many students were not an appropriate fit for a degree completion program but still contacted institutions after seeing billboards, hearing radio ads, or visiting the campaign website.

The Kentucky Council on Postsecondary Education invested \$60,000 in initial implementation and marketing and calculated a direct marketing expense of only \$69 per graduate.

Source: Project Graduate, Kentucky Council on Postsecondary Education, <http://cpe.ky.gov/committees/collegeaccess/projgraduate/>; EAB analysis.

# Key Lessons to Facilitate Adult Degree Completion

## 11 Expedited Re-admit Procedures

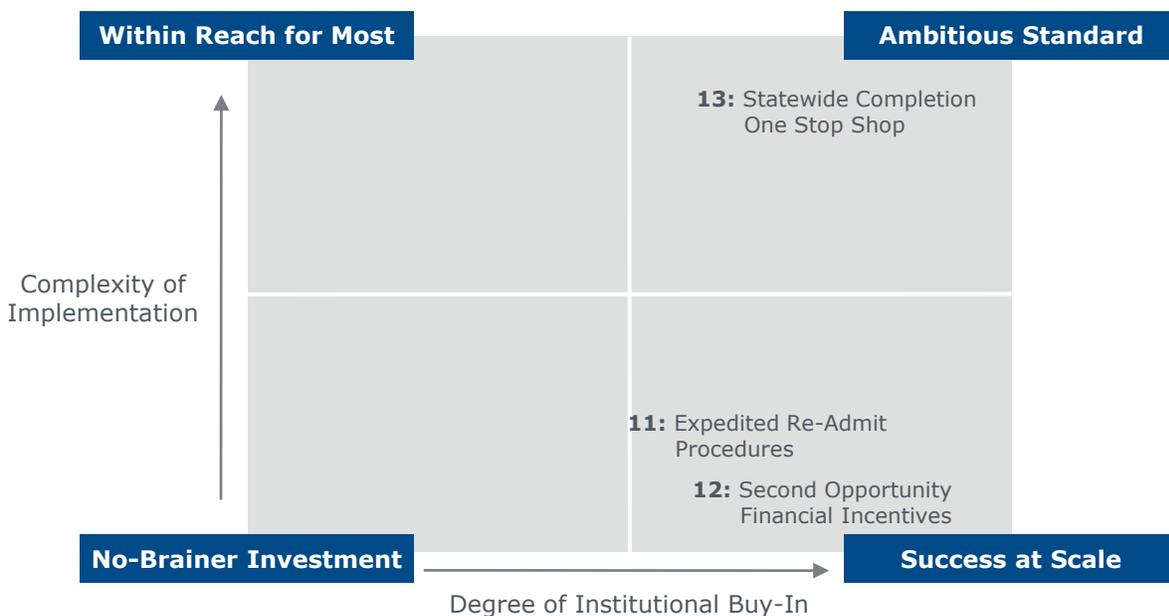
Create an expedited re-admission process, including transcript audits, prioritized course enrollment, and dedicated re-admissions counseling to facilitate return enrollment.

## 12 Second Opportunity Financial Incentives

Couple simplified re-admission procedures with financial incentives to facilitate re-enrollment of students, especially near completers who left in good academic standing.

## 13 Statewide Completion One Stop Shop

Implement unified branding, messaging, and marketing efforts across a system or state to reduce cost per graduate and make returning less complex for prospective students.



# Advisors to Our Work

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The Forum would like to express its deep gratitude to the individuals and organizations that shared their insights, analysis, and time with us. We would especially like to recognize the following individuals for being particularly generous with their time and expertise.

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