Education Advisory Board | Student Affairs Forum

Responding to Students of Concern

Best Practices for Behavioral Intervention Teams

Student Affairs Forum

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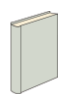
The ideas and practices profiled in this publication are the result of extensive work with Student Affairs executives, behavioral intervention teams (BITs), staff members, and experts across North America. The Forum also conducted a benchmarking exercise as part of this research to help shed light on current BIT structures, members, and processes.

The Anatomy of a Study

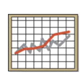
EAB Research Process Overview



Comprehensive Literature Search

130+ Interviews

- Student Affairs Executives
- BIT Chairs and Team Members
- National Experts and Consultants



Analysis of BIT Structure, Members, and Processes

Key Organizations

- National Behavioral Intervention Team Association (NaBITA)
- The Jed Foundation
- National Center for Higher Education Risk Management (NCHERM)
- NASPA Campus Safety Knowledge Community
- Higher Education Case Management Association (HECMA)

Source: Advisory Board interviews and analysis.

During this research, interviewees highlighted how the description of a student of concern varies widely across campuses. As a result, the Forum used a broad definition encompassing a range of behaviors from the student with unexplained outbursts in the classroom to the student engaging in self-injurious behavior in the residence hall to the student who has made several attempts on his or her life.

Illuminating the "Gray Area"

Students of Concern Encompasses Most Issues Short of Imminent Threat

A Diverse Group of At-Risk Students, Including Those With…

- Classroom outbursts
- Psychiatric hospitalizations
- Eating disorders
- Depression
- Anxiety or sleep disorders
- Disruptions in residence hall
- Suicide Ideation
- Suicide attempts

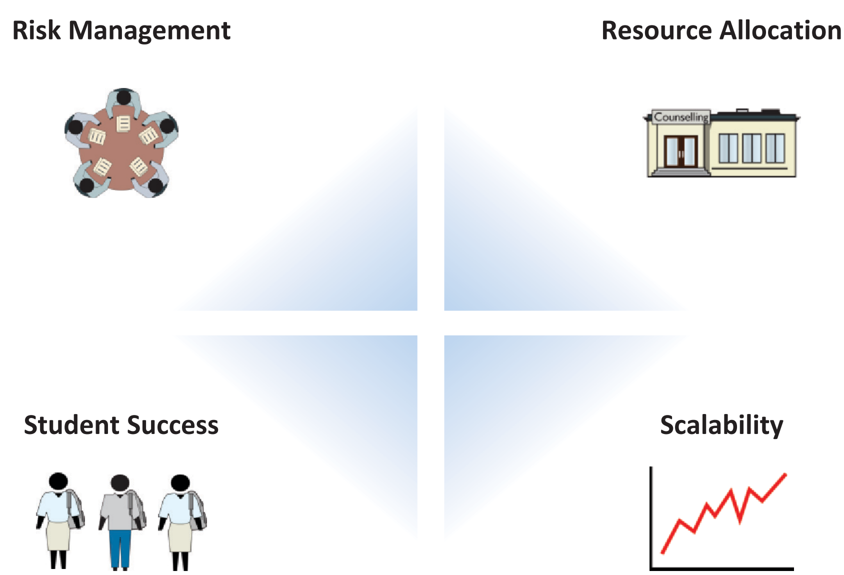
Source: Advisory Board interviews and analysis.

This publication does not focus on potential shooters or threat assessment. Interviewees noted that the majority of their time is spent working with students whose behavior is distressed or distressing but stops short of imminent threat. As such, members directed the Forum to focus on the students of concern, a place where they felt best practices would be most helpful.

The Forum's research uncovered four urgency drivers behind members' current interest in students of concern. These drivers include institutional risk management, resource investment, student success, and scalability. Interviewees particularly stressed scale as an emerging issue for Student Affairs organizations, highlighting the growing number of cases as well as the perceived increases in severity and complexity.

Why Do Research on Students of Concern Now?

Four Key Drivers of Member Interest



Source: Advisory Board interviews and analysis.

The Forum also observed how these cases place considerable strain on Student Affairs divisions as a small number of concerning students often end up consuming a disproportionate amount of practitioners' time and energy.

These developments are particularly noteworthy given the amount of resources institutions have invested in student mental health across the past five years. Institutions have added counselors, created peer mentoring programs, hired additional psychiatrists, and enhanced campus outreach initiatives.

A Growing Array of Mental Health Support Services

Institutions Adding Staff and Resources to Reach More Students

70% Of counseling center directors report that psychiatric services are offered on campus

52% Of counseling center directors report a budget increase in the past year

74% Of institutions provide stress-reduction education programs

1400 Institutions participating in the ULifeline network of mental health resources

Resources and Programming for Students

Educational Programming

- Stress and wellness workshops
- ULifeline web resources
- Active Minds chapters
- QPR training
- Mental HealthEDU

Outreach Efforts

- Mental Health First Aid
- Online mental health screenings and resources
- Depression screening events on campus

Treatment Services

- Peer mentoring
- Group therapy
- Case management
- Psychiatric consultations

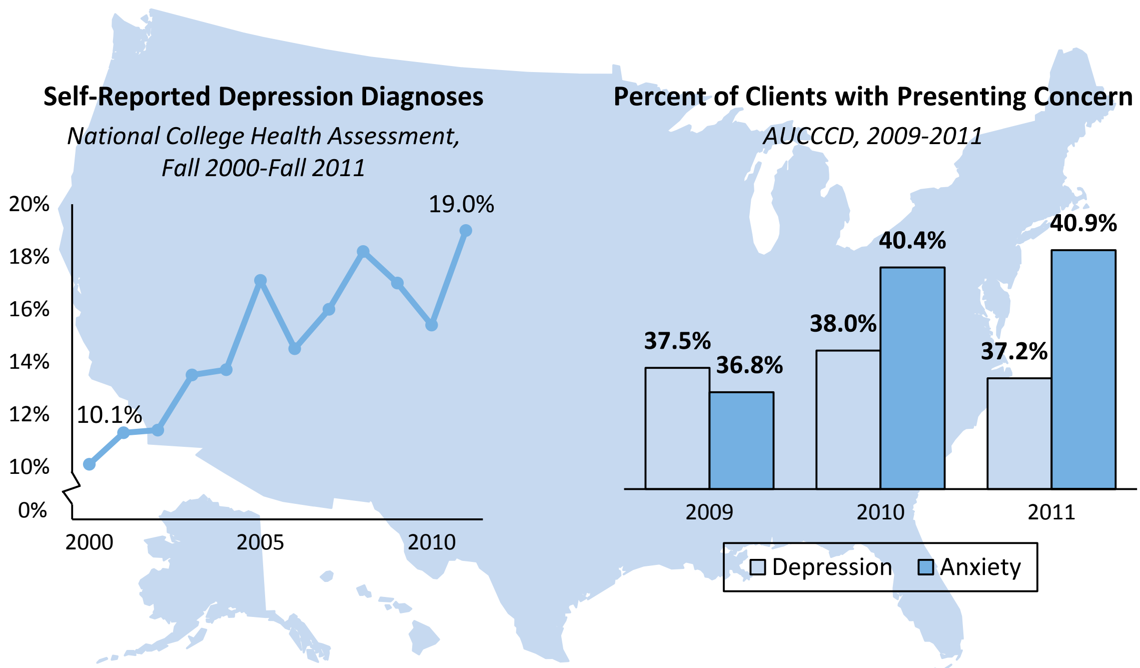
Source: Association for University and College Counseling Center Directors (AUCCCD) Survey (2011), at http://www.aucccd.org/director_surveys.html; The Jed Foundation, ULifeline web page, at http://www.jedfoundation.org/professionals/programs-and-research/ulifeline; Robert P. Gallagher and the American College Counseling Association, *National Survey of Counseling Center Directors* (International Association of Counseling Services, 2011), at http://www.iacsinc.org/2011%20NSCCD.pdf; Victor Barr et al., *Trends in College Counseling Centers Nationally: Association for University and College Counseling Center Directors*, Presentation at the 2011 NASPA Annual Conference, at http://www.aucccd.org/img/pdfs/naspa_trends_in_counseling_ctrs_nationaly.pdf; Advisory Board interviews and analysis.

Forum interviewees note that the goal behind these investments is to combat mental health stigma, raise awareness of campus resources, and encourage students to proactively seek help.

Despite the investments made by colleges and universities in support services, student self-reported mental health data continues to indicate very high levels of distress. For example, data from national surveys suggest that depression diagnoses and anxiety concerns are both on the rise among college students.

A Snapshot of Student Mental Health Trends

Depression and Anxiety on the Rise



Source: American College Health Association, *National College Health Assessment* (Fall 2000–Fall 2011) at http://www.achancha.org/pubs_rpts.html; AUCCCD Survey (2009–2011); Advisory Board interviews and analysis.

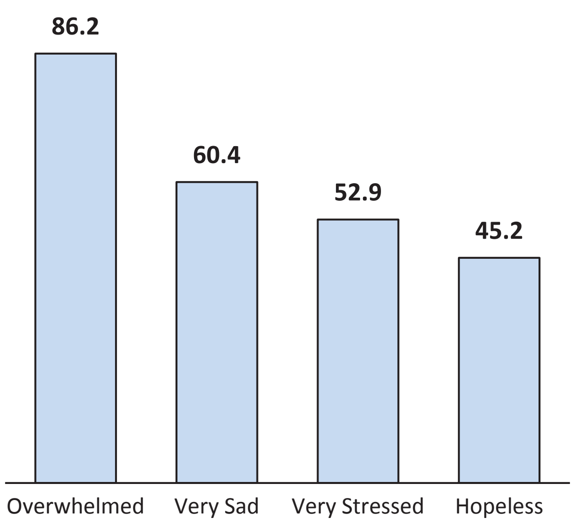
Forum research also surfaced concerns about the lack of coping skills and resilience among current students. Some executives suggest that today's generation of students suffers from "learned helplessness" due to helicopter parenting. This issue is further exacerbated by large amounts of student debt, a poor job market, and broader economic concerns.

The Underprepared Generation

Current Students Report High Levels of Emotional Distress

Prevalence of Distress Among College Students in Last 12 Months

National College Health Assessment, Fall 2011
n=27,774



Primary Causes of Distress

- Lack of coping skills and self-sufficiency
- Poor communication skills
- Difficulty sustaining healthy relationships
- Looming student debt
- Weak job market
- Financial problems at home
- High academic expectations

Failing to Cope

"We are enabling learned helplessness. Kids are coming into college who have had parents run interference for them in K-12. The helicopter parents have trouble letting go, and the student has no idea what to do on their own."

Student Affairs Practitioner
Public University

Source: *National College Health Assessment* (Fall 2011); Advisory Board interviews and analysis.

Essay

Essay

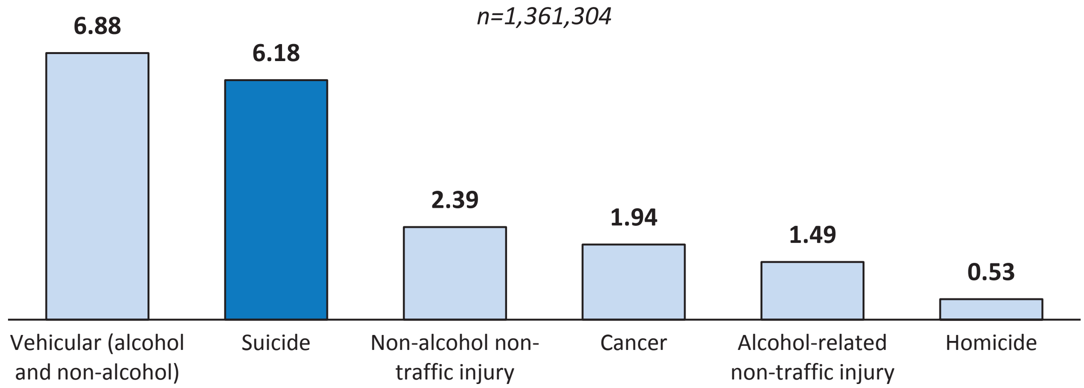
Forum work suggests that these broader mental health issues are clearly taking a toll as more students contemplate desperate measures. Between Spring 2009 and Fall 2011, the percentage of students who reported seriously considering suicide at some point in the past 12 months rose from 6% to 6.6%. At the same time, suicide continues to be the second leading cause of death among college students after vehicular accidents.

Grappling with Suicide on Campus

A Leading Cause of Mortality among College Students

Rate of Mortality by Cause per 100,000 American College Students

American Public Health Association, Fall 2011
n=1,361,304



6.6% Of students **considered suicide** in the past 12 months (Fall 2011)

1.1% Of students **attempted suicide** in the past 12 months (Fall 2011)

Source: James C. Turner and Adrienne Keller, "Leading causes of mortality among American college students at 4-year institutions," American Public Health Association Online Meeting, November 2, 2011, at https://apha.confex.com/apha/139am/webprogram/Paper241696.html; *National College Health Assessment* (Fall 2011); Advisory Board interviews and analysis.

Forum research also highlights growing concerns about student mental health outside of the United States. Recent data from Canada reveals even higher percentages of students who report feeling sad, being so depressed it was difficult to function, and seriously considering suicide.

Not Just a Problem in the USA

Data Suggests Canadian Students Experiencing High Levels of Distress

Percentage of Students Reporting Mental Health Problems in Canada and the United States

CACUSS/ASEUCC Working Group, 2011

Mental Health Problem	Canada	USA	Difference
Felt overwhelmed by all they had to do	89%	86.4%	+2.6%
Felt exhausted—not from physical activity	85.2%	81.1%	+4.1%
Felt very lonely	61.9%	57.7%	+4.2%
Felt very sad	67.7%	62.0%	+5.7%
Felt things were hopeless	54.0%	46.0%	+8.0%
Felt overwhelmed by anxiety	52.9%	49.1%	+3.8%
Felt so depressed it is difficult to function	36.4%	30.7%	+5.7%
Seriously considered suicide	7.2%	6.0%	+1.2%
Intentionally, cut, burned, bruised, or otherwise injured yourself	5.4%	5.1%	+0.3%
Attempted suicide	1.2%	1.1%	+0.1%

Source: Gail MacKean, *Mental Health and Well-Being in Post-Secondary Education Settings: A Literature and Environmental Scan to Support Planning and Action in Canada*, CACUSS Pre-Conference Workshop on Mental Health (June 2011), at http://www.tgao.ca/assets/pdfs/CACUSS.MHCC-Student-Mental-Health-Jun19.2.pdf; Advisory Board interviews and analysis.

As a result, there are a number of initiatives underway in Canada focusing on post-secondary student mental health. Forum research surfaced notable examples such as the Principal's Commission on Mental Health at Queen's University, the University of Alberta's Provost Fellow, and the Canadian Association of College and University Student Services (CACUSS)'s working group.

High-Profile Mental Health Initiatives Underway in Canada

Multiple Constituencies Tackling the Post-Secondary Student Issue

CACUSS / ASEUCC

Post-Secondary Student Mental Health Working Group

- Robust group of Canadian faculty, administrators, and students established in Fall 2010
- Goal is to develop a national vision for student mental health at post-secondary institutions
- 150+ participants at 2011 town hall, leads to creation of Student Advisory committee, Community of Practice discussion group, and a Framework drafting committee

Queen's UNIVERSITY

Principal's Commission on Mental Health

- Commission established by Queen's Principal in September 2011, group includes faculty, administrators, and a student
- Purpose is to make recommendations to inform a comprehensive approach for student mental health on campus
- Interim report released June 2012, final recommendations due October 2012

UNIVERSITY OF ALBERTA

Provost Fellow for Student Mental Health

- Faculty member, Dr. Robin Everall, appointed as Provost Fellow in December 2011
- Year-long position focused on ensuring adequate mental health services are available to "facilitate student engagement and academic success"
- Final report on campus services and general mental health best practices expected in 2013

Source: Carl Amrhein, "University of Alberta Interdepartmental Correspondence" (December 12, 2011); Jennifer Hamilton et al., "Update on the CACUSS Post-Secondary Student Mental Health Initiative" (February 2012), at https://www.cacuss.ca/content/documents/Link/Mental%20Health_update.pdf; Kate Lunau, "The Mental Health Crisis on Campus," *Macleans on Campus* (September 5, 2012), at http://oncampus.macleans.ca/education/2012/09/05/the-mental-health-crisis-on-campus/; Advisory Board interviews and analysis.

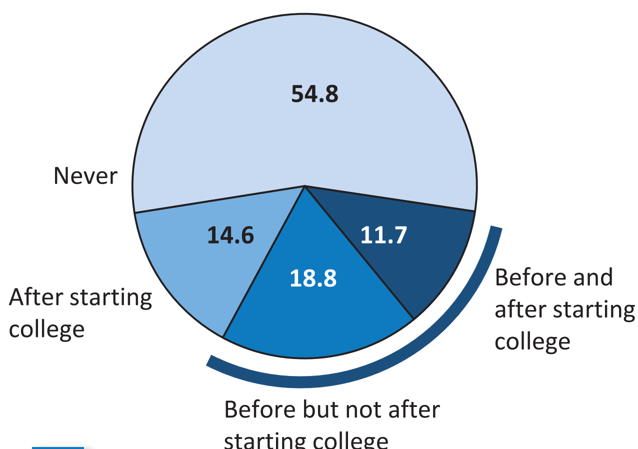
Although these initiatives range in scale, the common goal is to shine a spotlight on student mental health, generating conversations about the necessary services, best practice recommendations, and community-wide approaches.

Forum work also highlights how many individuals are coming to college on medication or with prior psychological treatment histories. According to data from the Center for Collegiate Mental Health (CCMH), a large percentage of mental health disorders present themselves prior to a student's enrollment in post-secondary education.

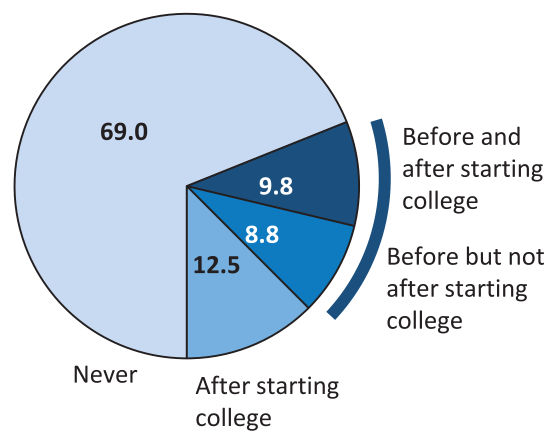
More Students with Treatment Histories, On Medication

High Likelihood of Relapses and Complications

Percentage of Students Who Have Attended Counseling for Mental Health Concerns
CCMH, 2011



Percentage of Students Who Have Taken Medication for Mental Health Concerns
CCMH, 2011



46%

Of 12- to 17-year-olds who recover from a depressive episode relapse within five years

Source: Center for Collegiate Mental Health, *2011 Annual Report* (Penn State), at http://ccmh.squarespace.com/storage/CCMH_AnnualReport_2011.pdf; John Curry, et. al., "Recovery and Recurrence Following Treatment for Adolescent Major Depression," *Archives of General Psychiatry* 68 (March 2011), 263-269; Advisory Board interviews and analysis.

Interviewees also note that medication management in college adds another layer of complexity to student mental health needs.

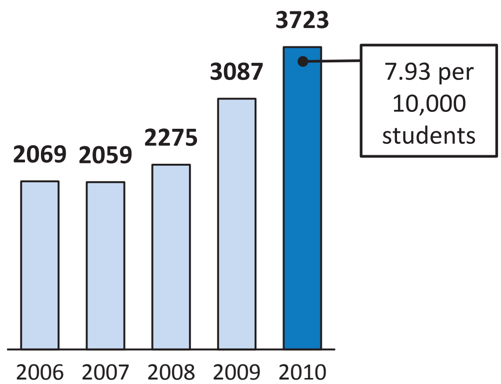
Despite additional resource investments, many institutions struggle to respond to students of concern. For example, data from the Association of University and College Counseling Center Directors (AUCCCD) illustrates how student psychological hospitalizations have risen sharply across the past few years. In many of these cases, Student Affairs practitioners are on the frontlines, responding to the crisis and coordinating follow-up.

Growing Case Complexity on Campus

Places Additional Strain on Staff Members and Resources

Students' Psychological Hospitalizations

AUCCCD Directors' Survey, 2010



The Difficulties of Scaling Up

"We have spent more time this year on these interventions than any year in the past. We had at least nine hospitalizations in the final weeks of the term. This means I am getting more involved in these cases to the detriment of my other work…"

Dean of Students
Private University

Source: Barr et al., *Trends* (2011); Advisory Board interviews and analysis.

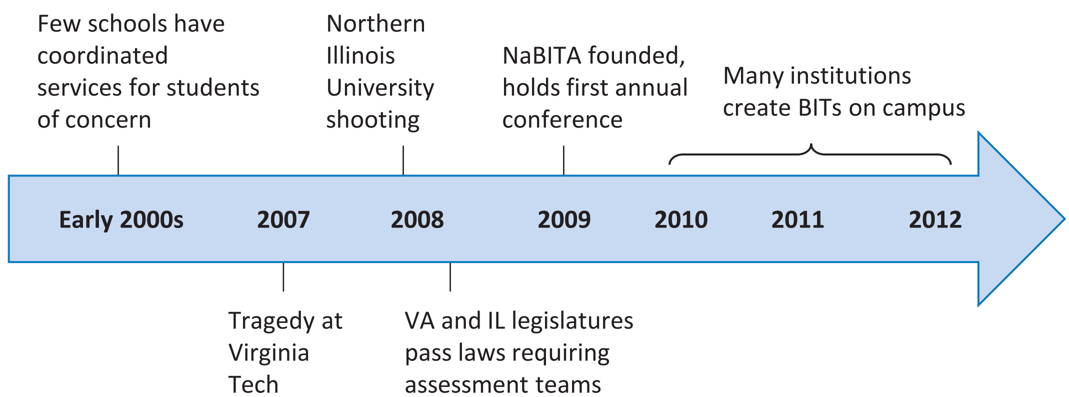
Given these trends, it was not uncommon for some Student Affairs executives to describe their staff members as being overwhelmed and exhausted by their duties in working with students of concern.

In order to coordinate institutional responses and better manage these students, institutions have increasingly turned to behavioral intervention teams (BITs). Forum benchmarking found that 93% of colleges and universities currently have a BIT or a comparable team on campus.

The Emergence of the Campus BIT

Providing a Coordinated Response for Students of Concern

A Brief History of BITs from 2000 to 2012



93%

Of colleges and universities in the EAB sample (n=100) have a BIT or comparable team

97%

Of colleges and universities in a recent study (n=181) have a BIT or comparable team

Source: Christian Gamm, Michael Mardis, and Dana Sullivan, *Behavioral Intervention & Threat Assessment: Exploring Reasonable Professional Responses*, Presentation at ACPA Annual Conference (Baltimore: March 2011); Advisory Board interviews and analysis.

Many of these interdisciplinary teams were established in the wake of the tragic events at Virginia Tech and Northern Illinois University. In some cases, informal, pre-existing groups were formalized under a BIT charter whereas other institutions created new entities.

While most institutions currently have a BIT, Forum research uncovered significant uncertainty about the group's role, processes, and overall efficiency in responding to students of concern. Interviewees consistently stressed their interest in learning how other institutions structured their BITs, highlighting questions around scope, mission, and membership. Research contacts also raised concerns about the team's ability to scale their work in the face of growing caseload and complexity.

Widespread Uncertainty Around "Right Answer"

Nascent State of the Field Leaves Practitioners Searching for Guidance

A Work in Progress

"When I arrived here, we didn't have a CARE team. One of my first projects was to pull together a cross-functional team. They have accomplished a lot, but I still see the team as a work in progress."

Vice President for Student Affairs
Public University

Time for a Change?

"We are a small place and have always handled distressed students on an as-needed basis with a focus on their well-being…but increasingly we are seeing a lot more students, and our on-the-fly efforts aren't enough. We need to try something else…but I don't know what that looks like."

Dean of Students
Private University

A Relatively New Field

"Overall, the field is very young. Before BITs, there were just ad hoc groups of staff, getting together to talk and maybe sharing information. These groups used to wait for something to happen and [then] respond…So it isn't a surprise that they want to know now what others are doing with their BITs."

Scott Lewis
NaBITA

Source: Advisory Board interviews and analysis.

To help address members' questions, the Forum conducted a benchmarking exercise of more than 100 BITs, gathering data through interviews and web searches. The Forum's analysis illustrates how the scope of these teams range widely. Some groups concentrate only on students while other teams have students, faculty, and staff in their purview.

The Forum's benchmarking exercise also highlights the range of functions and interventions for these groups. Some teams focus on student assistance while others only conduct threat assessment. The most common approach is for teams to conjoin behavioral intervention and threat management. In these situations, the threat management group is usually a smaller subset of the BIT with additional members such as the General Counsel or a representative from Human Resources added as needed.

Team name plays an important role in establishing the group's identity and community branding. The word cloud below illustrates a selection of the group names seen in the research. The Forum suggests that groups choose a name that fosters an image of the team as a campus support resource, rather than emphasizing threat assessment or crisis response.

Establishing an Identity on Campus

Team Name Must Convey Mission and Purpose to Community

"What Should Our Group Be Called?"

"Do We Label Our Team as Threat Assessment?"

"On some campuses, teams avoid the term 'threat assessment' because they worry that it may imply that the campus is a dangerous place. Others…may want to signify that those who pose threats are also people in need of help, choosing instead a name such as 'At-Risk Student Support.'"

The Jed Foundation and HEMHA,
Balancing Safety and Support on Campus

Source: The Jed Foundation and the Higher Education Mental Health Alliance, *Balancing Safety and Support on Campus: A Guide for Campus Teams* (2012), at http://www.jedfoundation.org/campus_teams_guide.pdf; Advisory Board interviews and analysis.

The Forum recommends Behavioral Intervention Team, At-Risk Student Support, and Student Care Team because these names encourage referrals while also communicating a sense of the team's purpose.

The Forum's work demonstrates how the selection of the BIT chair is important not only for the group's mission but also for the day-to-day operations. Most teams are chaired by a Student Affairs leader with the Dean of Students being the most common title. The Forum recommends that the chair be a senior Student Affairs leader with the authority to make important decisions and the ability to quickly coordinate a cross-functional response.

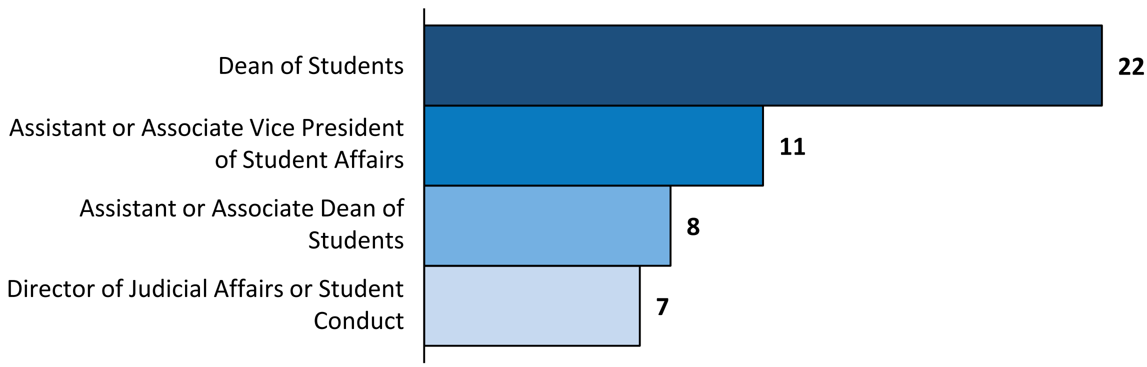
"Who Is Leading the Team?"

Most BITs Chaired by Dean of Students

Most Common Titles of BIT Chairs

EAB Analysis

n=73



Other Positions Chairing BITs

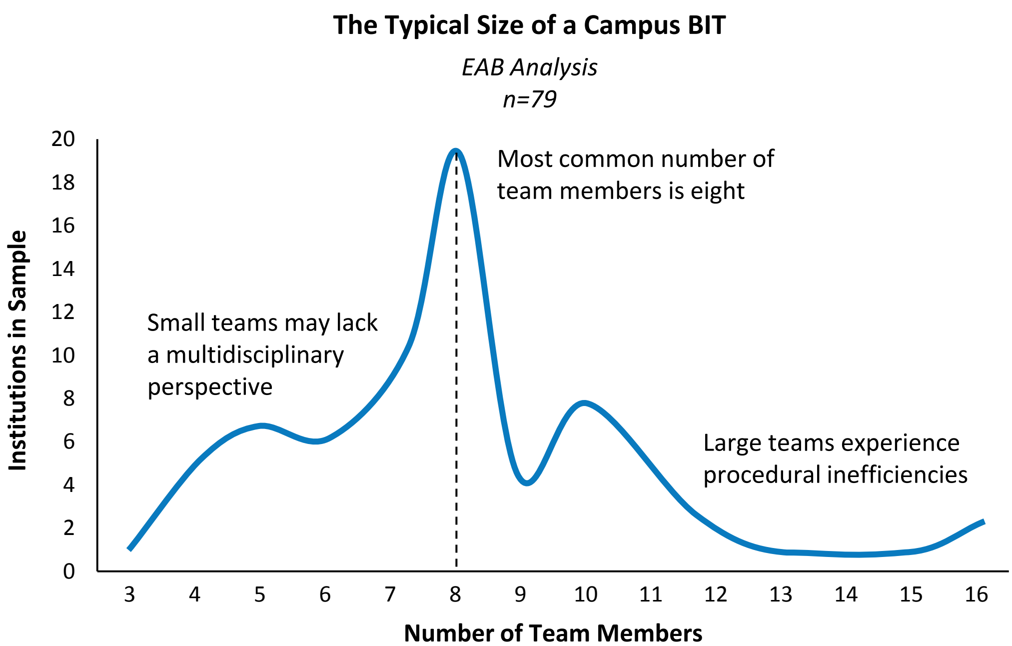
- Vice President of Student Affairs
- Director of Disability Services
- Case Manager
- Director of Counseling
- Director of Student Health and Wellness
- Director of Campus Safety

Source: Advisory Board interviews and analysis.

At its best, a BIT leverages a range of perspectives to generate a course of action in responding to a student of concern. At its worst, a team becomes unwieldy raising concerns about efficiency and privacy. The Forum's analysis revealed that the average team size is eight members. Overall, the Forum recommends that teams keep membership between six and ten individuals.

Team Size Varies Greatly

Optimal Group Balances Multiple Perspectives with Need for Efficiency



Source: Advisory Board interviews and analysis.

While team composition varies across institutions, most BITs include members from counseling services, public safety, residence life, and student conduct. Interviewees suggest that students of concern are most likely to surface in these areas, making them a natural fit for the team. Depending on the types of students being referred, the group may consider adding permanent representatives from the Provost's office, the General Counsel's office, or the graduate school.

Assembling a Multidisciplinary Group

Team Composition Varies But Common Emphasis on Diverse Viewpoints

Most Common Team Members

Gamm et al.
n=175

Position	Percentage of Sample
Counseling Center Director	87.4%
Director of the Department of Public Safety	79.4%
Housing Director	71.4%
Dean of Students	65.1%
Student Conduct Officer	64.0%
Health Services Director	46.3%
Faculty Representative	41.7%
Vice President of Student Affairs	34.9%

Notable Trends in EAB Analysis

44.6% Of teams include a representative from the Provost's office

7.2% Of teams include a representative from the General Counsel's office

In teams adding regular members who work with key student populations, such as graduate students or international students

Source: Gamm et al., *Behavioral Intervention* (March 2011); Advisory Board interviews and analysis.

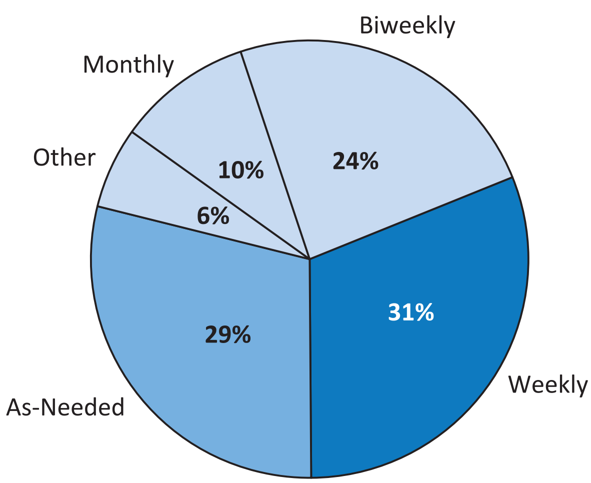
The Forum's benchmarking exercise revealed that the majority of teams meet on a weekly basis for either sixty or ninety minutes. Many of these groups also hold regular meetings across the summer and during winter break, using these sessions for training, process review, and strategic planning. The Forum strongly recommends holding regular standing meetings throughout the year as a best practice.

Ensuring Teams Meet Regularly

Standing Meetings Reinforce the Importance of BIT Work

Frequency of BIT Meetings

Gamm et al., 2011
n=181



Striking a Balance

"It is worth noting that if the meetings are sufficiently infrequent, the team might lose its effectiveness and the members may lose their enthusiasm. At the same time, meeting too frequently may result in team burnout. This is one of the issues that will need to be monitored by the team leader."

Jed Foundation and HEMHA
"A Guide for Campus Teams"

Source: Gamm et al., *Behavioral Intervention* (March 2011); the Jed Foundation, *Balancing Safety and Support* (2012), 11; Advisory Board interviews and analysis.

Research contacts highlight how BITs deal with a variety of issues ranging from emotional distress to suicide threats to classroom disruptions. Given the complexity and severity of these issues, it is essential that the group coordinates an institutional response that balances student welfare with community safety.

A Wide Range of Concerning Behaviors

Recent Study Finds BITs Deal with Diverse Issues

Situations Most Frequently Addressed by BITs

Gamm et. al., 2011
n=181

Type of Case	Percentage of Sample
Threats of violence to others	91.2%
Emotional distress	87.3%
Suicidal threats	86.2%
Inappropriate communications	82.9%
Classroom disruptions	82.3%
Stalking behaviors	80.7%

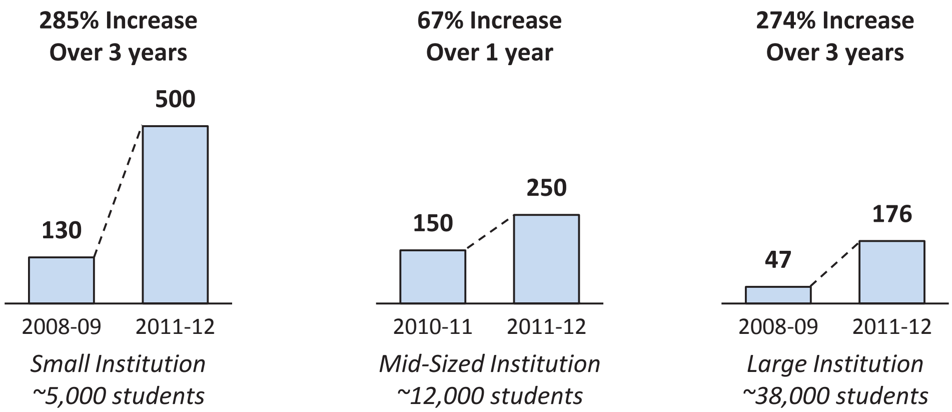
Source : Gamm et al., *Behavioral Intervention* (March 2011); Advisory Board interviews and analysis.

Regardless of institution size or type, Forum research illustrates significant increases in BIT workloads across the past three years. As case volume and complexity grows, the difficulties of responding to and managing students of concern place a heavy burden on team members.

Stretched Thin with No End in Sight

Increases in Number and Severity of Cases Reported to BITs

Growth in BIT Workload at Three Institutions



Bearing a Heavy Burden

"There are increasing numbers of students who present with a level of seriousness and also increasing numbers of students that we feel we really need to keep their eye on. This is a big drain on our staff and on our time."

Student Affairs Practitioner
Public University

Source: Advisory Board interviews and analysis.

At the same time, the BIT's work has become more complicated due to the revisions to Title 2. Interviewees highlighted how the changes to the direct threat standard (with the removal of the language regarding threat to self) raise concerns about the legality of involuntary withdrawal policies at institutions around the country. Several professional organizations have publicly raised concerns about the revisions and asked for further clarification around issues such as how exactly the government will determine if an institution has discriminated against a student.

Mixed Messages from Washington

Changes in ADA's Direct Threat Standard Further Complicate BIT Work

Title II Direct Threat Standard

Before March 2011

"OCR policy holds that nothing in Section 504 prevents educational institutions from addressing the dangers posed by an individual who represents a "direct threat" to the health and safety of **self or others** [EAB emphasis added], even if such an individual is a person with a disability…"

Rhondа Bowman
U.S. Department of Education, Office for Civil Rights

After March 2011

"Direct threat means a significant risk to the health or safety of **others** [EAB emphasis added] that cannot be eliminated by a modification of policies, practices, or procedures, or by the provision of auxiliary aids or services as provided in Section 35.139."

Department of Justice
Americans with Disabilities Act

Organizations Responding and Seeking Further Clarification

NASPA Student Affairs Administrators in Higher Education

NCHERM The National Center for Higher Education Risk Management

NACUA Advancing the effective practice of higher education attorneys

Primary NACUA Concerns

- Inability to act swiftly in the best interest of students who pose a danger to themselves
- Inappropriateness and possible illegality of treating self-harm as a conduct violation
- Ambiguity surrounding institutions' reinstatement policies for students on leave
- Confusion regarding how OCR will determine if an institution has discriminated against students who pose a danger to themselves

Source: Rhonda Bowman, "Letter to Bluffton University" (December 2, 2004), at http://www.bazelon.org/LinkClick.aspx?fileticket=LWFnT1VirFU%3D&tabid=313; "Part 35 - Nondiscrimination on the Basis of Disability" (Revised September 15, 2010), at http://www.ada.gov/regs2010/titleII_2010/titleII_2010_withbold.htm; Advisory Board interviews and analysis.

The Forum's research conversations revealed considerable confusion and uncertainty about the Title 2 revisions with institutions developing a range of responses. While the government promised to issue further clarification, they have neither provided additional comments nor outlined a timeline for doing so. As a result, many schools are waiting for additional guidance and/or a legal test case to emerge.

Broad Uncertainty among Senior Leaders

Unsure How to Proceed, Institutions Take Various Paths

Spectrum of Responses to Title II Change

Keeping Involuntary Withdrawal Policies	Waiting for Additional Guidance	Removing Involuntary Withdrawal Policies
"Putting someone with psychological issues through the conduct process is bad for everyone involved."	"Our policy remains in place, but we don't really intend to use it. We didn't use it much before, but now we just want to see what OCR says with the first test case."	"Our general counsel said our involuntary withdrawal policy had to go; therefore, we've lowered our threshold for conduct."
"Sue me. Go ahead and sue me. I would rather justify and document my actions than leave a student in danger who is a threat to him or herself."	"We're hopeful that OCR will provide some guidance. They indicated that it would be forthcoming."	"The involuntary withdrawal policy really helped with eating disorders. It was a good lever to convince people to seek treatment."

Source: Advisory Board interviews and analysis.

Forum research surfaced the University of North Carolina at Charlotte as an example of an institution that has revised its policies in the wake of the government's recent actions. The excerpt below comes from their revised policy and the language reflects the changes made to Title 2.

Removing a Last-Resort Tool

UNC Charlotte's Revised Involuntary Protective Withdrawal Policy

Student Involuntary Protective Withdrawal Policy

IV. Standard for Involuntary Protective Withdrawal

A student will be subject to involuntary protective withdrawal if the Coordinator, in consultation with the representatives of the Campus Behavioral Intervention Team, concludes that the student is suffering from a medical or psychological disorder and, as a result of the disorder, *poses a direct threat to the health or safety of others* [emphasis added]**.** In making this determination, the Coordinator, in consultation with the Campus Behavioral Intervention Team, will make an individualized assessment, based on reasonable judgment that relies on current medical knowledge or on the best available objective evidence, to ascertain:

- The nature of the risk,
- The duration of the risk,
- The severity of the risk,
- The probability that the potential injury will actually occur
- Whether reasonable modifications of policies, practices, or procedures or the provision of auxiliary aids or services will mitigate the risk

Losing an Important Lever

"My opinion is that [the Title II revision] makes things more difficult for the Dean of Students, for BITs, for Housing, and for Counseling Centers. We did have a tool that we used as a last resort for students who did not violate any university policies but posed a danger to themselves. Now, you don't have a policy mechanism to remove them on an interim or permanent basis, and it's just very difficult."

Michele Howard
The University of North Carolina at Charlotte

Source: The University of North Carolina at Charlotte, "University Policy 408, Student Involuntary Protective Withdrawal Policy" (2012), at https://legal.uncc.edu/policies/up-408; Advisory Board interviews and analysis.

In the wake of the Title 2 changes, communication with parents and families has emerged as an area where Student Affairs executives are re-examining their approaches. Many leaders suggest that they are now involving a student's family earlier in situations where the BIT believes that they can be a helpful ally.

Difficult Decisions, No Easy Answers

Student Affairs Leaders Eager for Discussion Around Key Questions

Parental Notification

"Should we contact parents earlier so that they can convince their student to take time off?"

"What will my general counsel think of FERPA's exception for students who remain dependents on their parents' tax returns?"

"Who among our staff should serve as the liaison to parents in cases of severe student distress?"

Student Conduct Process

"Does the conduct process negatively affect a student in psychological distress?"

"Do our judicial affairs staff require specialized training to meet the challenges of this new reality?"

"Are we permitted to involuntarily withdraw students who pose a threat to themselves but not to others?"

Extreme Cases

"What are other BITs doing to convince students to take time off?"

"What levers do we have to convince students to seek treatment?"

"Are behavioral contracts legal and/or effective tools?"

Source: Advisory Board interviews and analysis.

Research contacts also note that refunds and grades can be a powerful lever in working with families. Although these policies are usually fixed at the institutional level, leaders note that there is typically some flexibility for retroactive withdrawals particularly if there is concrete evidence as to when the student's distress began. Refunds and grades can be useful tools in negotiating with families, encouraging students to take time off and setting the groundwork for a successful return.

Responding to Students of Concern

Best Practices for Behavioral Intervention Teams

I.

Recalibrating Training Outreach

Practice #1:
Campus-Wide Basic Training

Practice #2:
Role-Based Differentiated Training

Profiled Institutions

- University of Rochester
- University of South Carolina
- Ozarks Technical Community College
- Georgia Tech
- Carleton University

II.

Branding One-Stop Referrals

Practice #3:
Central Point of Contact

Practice #4:
Post-Referral Communication

Practice #5:
Referral Gap Analysis

Profiled Institutions

- University of Akron
- Harper College
- Virginia Tech

III.

Formalizing Team Processes

Practice #6:
Procedures Manual

Practice #7:
Role Definitions

Practice #8:
Training Models

Practice #9:
Performance Audit

Profiled Institutions

- College of Charleston
- University of North Texas
- University of Utah
- Aurora University
- Buffalo State College (SUNY)

IV.

Consolidating Case Information

Practice #10:
Referral Auto Alerts

Practice #11:
Referral Escalation Manager

Practice #12:
Pre-meeting Briefings

Practice #13:
Case Recordkeeping Systems

Profiled Institutions

- Saint Joseph's University
- University of South Carolina
- Iowa State University
- College of Charleston
- University of South Florida
- UNC-Wilmington

V.

Monitoring Complex Cases

Practice #14:
Student-Facing Case Management

Practice #15:
Ongoing Case Review and Tracking

Profiled Institutions

- Harper College
- University of Miami
- Iowa State University
- University of South Florida

VI.

Linking BIT Work to Student Success

Practice #16:
BIT Operations KPIs

Practice #17:
Student Success Outcomes

Practice #18:
Forecasting Future Student Needs

Profiled Institutions

- University of Utah
- University of Alberta
- University of Alaska Anchorage
- Ohio University
- University of Florida
- Iowa State University
- University of Mississippi

Section I.

Recalibrating Training Outreach

Practice #1: Campus-Wide Basic Training
Practice #2: Role-Based Differentiated Training

Profiled Institutions

- University of Rochester
- University of South Carolina
- Ozarks Technical Community College
- Georgia Tech
- Carleton University

Diagnostic Questions

Recalibrating Training Outreach

The following questions are designed to guide members in evaluating their current outreach efforts regarding students of concern. Based on the number of affirmative responses, each member will fall into one of the categories on the opposite page. These categories can be used to identify tactics particularly well suited to member circumstances. Note: questions should be answered from the perspective of the BIT Chair.

Questions	Yes	No
1. Does your institution conduct in-person BIT training at times other than new faculty and staff orientation?	❑	❑
2. Does your BIT create an annual outreach plan to target campus populations that have not received training recently?	❑	❑
3. Do BIT training presentations cover the following key components: how to identify students of concern, the BIT's mission, directions for emergency situations, and an overview of the referral process?	❑	❑
4. Does your BIT have quick reference materials such as a 911 folder or a highly visible brochure?	❑	❑
5. Does your BIT have a dedicated website with clear instructions on the referral process, team membership, and contact information?	❑	❑
6. Do websites for your institution's counseling center, student conduct office, dean of students office, and faculty portal include links to the BIT website?	❑	❑
7. Does your BIT send reminders to faculty and staff during high-stress periods such as mid-terms and final exams?	❑	❑
8. Does your BIT review data annually to determine which departments or schools do not make any referrals?	❑	❑

Understanding Your Current State

Number of Yes Responses

0-2 Minimal Outreach: The BIT does not reach many audiences on campus. Few campus constituents know how to identify, respond to, and refer students of concern.

The Forum strongly recommends that institutions in this category create a *Dedicated BIT Website* with clear information about how to identify students of concern, what to do in an emergency, and how to refer students of concern to the BIT.

3-5 Standard Outreach: Some faculty and staff are generally aware of how to identify students of concern and typically make referrals to Student Affairs leaders.

The Forum recommends that institutions in this category develop *Quick Reference Materials* such as brochures or 911 folders to quickly increase campus awareness regarding students of concern and the BIT referral process. Additionally *Just in Time Reminders* (via email or campus mail) will help generate timely referrals at high-stress points during the academic year.

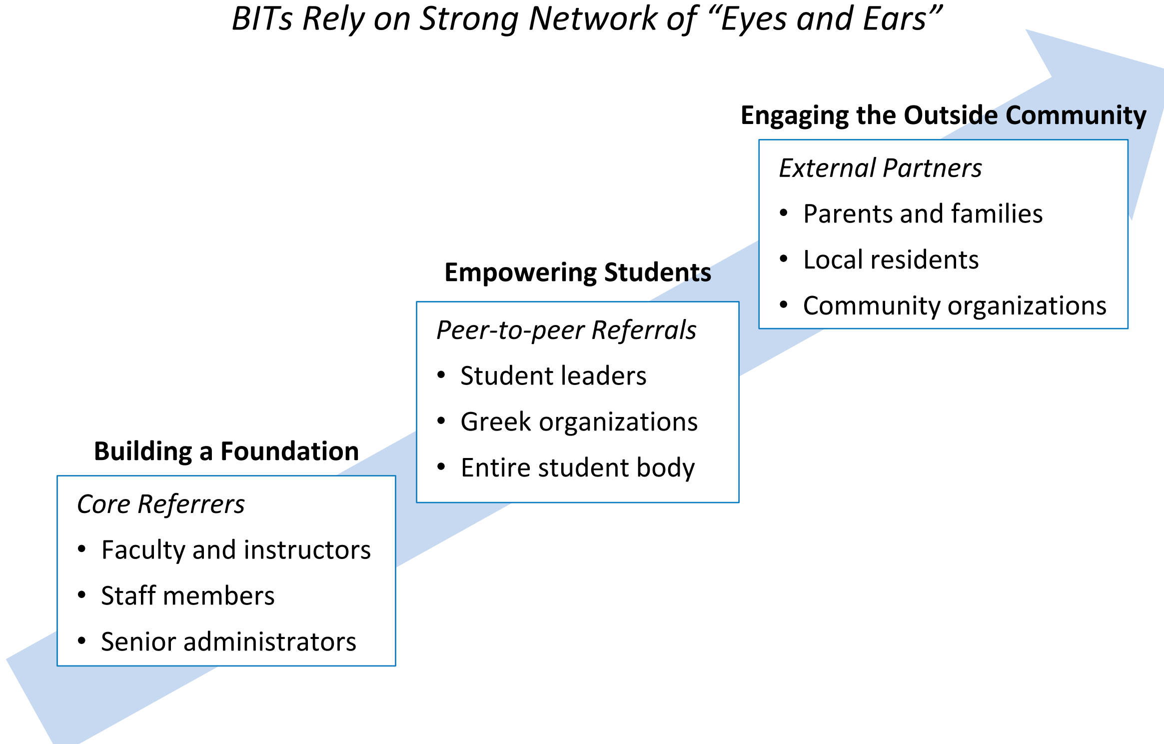
6-8 Advanced Outreach: Most faculty, administrators, and staff know about the BIT and understand the referral process. As a next step, some institutions are launching additional outreach campaigns to raise mental health awareness among students, parents, and community members while senior leaders at other universities are providing more specialized training to staff members who work closely with students of concern.

Institutions that fall into this category may consider implementing *Role-Based Differentiated Training* in order to address the varying needs for information and expertise across campus.

The Forum's work illustrates that the first step in responding to students of concern is to create a culture of referrals. If no one knows about the BIT or the team is not getting referrals from the community, there is little chance of success. Research contacts suggest that a BIT can't be successful in its work without partners on campus who can identify and refer concerning individuals.

Creating a Culture of Referrals

BITs Rely on Strong Network of "Eyes and Ears"



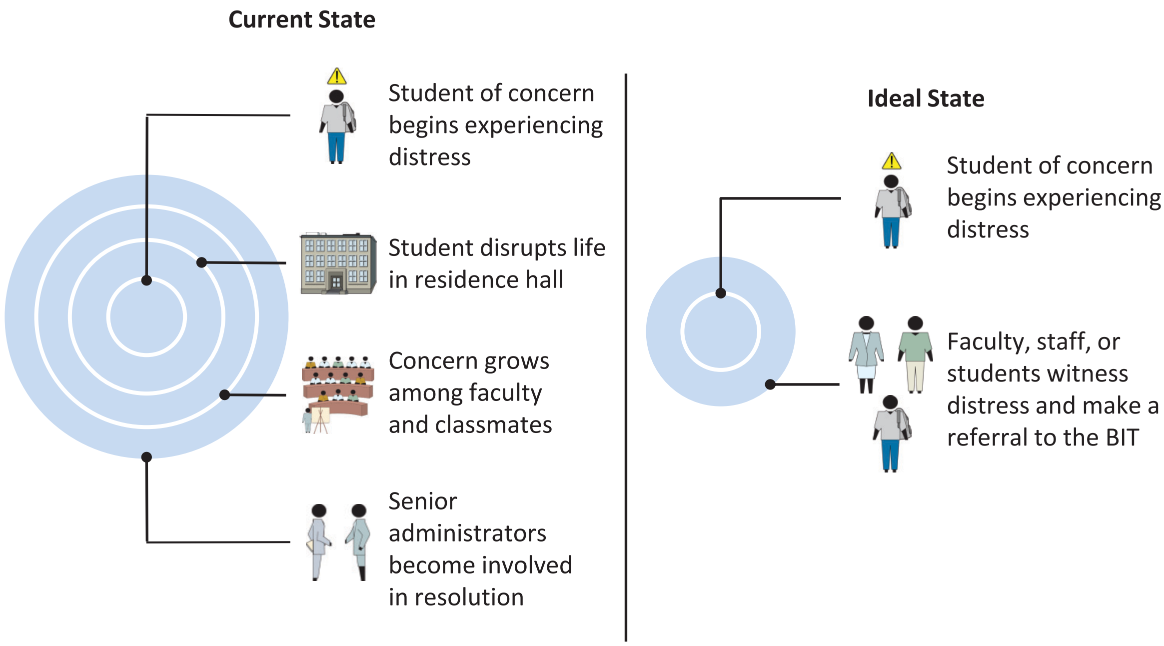
Source: Advisory Board interviews and analysis.

At some institutions, these partners are narrowly defined as faculty, staff, and administrators while other schools use a broader description that encompasses students and parents as well as individuals in the local community.

All too often, students of concern have a ripple effect on campus, causing stress and worry among roommates, classmates, faculty, and staff. Forum interviewees stress the importance of a robust campus referral network as being a key factor in early identification. If a student is found early, there is a greater range of options and resources available to support them.

Reducing the Ripple Effect

Students of Concern Cause Widespread Disruption on Campus



Source: Advisory Board interviews and analysis.

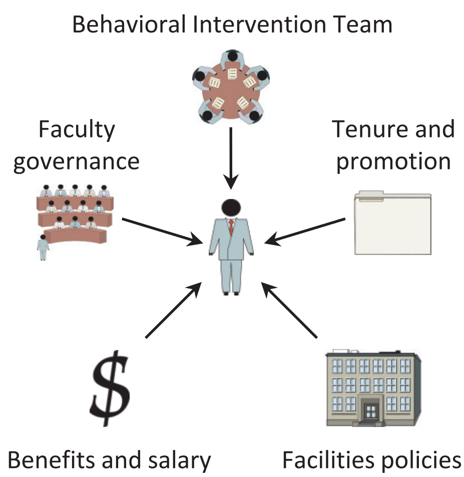
When a student surfaces in crisis, however, the options are very limited and in some cases the only choices are hospitalization, leave, or withdrawal.

The Forum’s research illustrates how most BITs focus their training efforts on new faculty and staff orientation. While these presentations get the team in front of new community members, they often compete for people’s mindshare with other topics such as benefits, HR policies, and parking. Also the team may miss constituencies such as adjuncts or teaching assistants who do not typically attend the institution’s orientation.

Too Early, Too Infrequent

Current Training Efforts Focus on Faculty and Staff Orientation

BIT Presentations Fail to Capture Mindshare during Orientation…



…and Leave Broad Segments of the Institution Untouched

Missed audiences include:

- Veteran faculty members
- Adjunct instructors
- Teaching assistants
- Research assistants
- Graduate assistants
- Student organization advisers
- Athletic coaches and trainers
- Part-time and summer staff
- Long-standing academic advisers
- Maintenance, dining, and housekeeping staff

Source: Advisory Board interviews and analysis.

Another issue for teams to consider is the quantity and depth of training material. Forum research shows that current outreach presentations typically include too much detail and often overwhelm faculty and staff. Some interviewees shared that attendees often leave feeling as if they need to diagnose students or to remember eight different offices and phone numbers.

Information Overload

Many BIT Presentations Confuse Faculty with Unnecessary Detail

Attendees come with questions about students…

"Is this my job?"

"How do I know if this student is going to become violent?"

"Shouldn't I just call counseling?"

Typical Presentation Content

1. Detailed statistics on college student mental health
2. Comprehensive set of behaviors to recognize and report
3. Robust role-playing exercises and materials
4. Limited material on classroom management techniques
5. Exhaustive list of campus referral resources

…and leave with unanswered concerns

"Am I qualified to identify and respond to these students?"

"Do I need a counseling degree for this?"

"What if I make the wrong decision about a referral?"

Source: Advisory Board interviews and analysis.

Practice #1: Campus-Wide Basic Training

To create a robust culture of referrals, the BIT must be visible on campus and proactively spread the word. As part of this research, the Forum identified four key elements in a best practice campus-wide training effort. These components are in-person training, quick reference materials, a dedicated website, and regular reminders.

Best-in-Class Training and Outreach Campaigns

Successful Initiatives Incorporate Four Critical Elements

Common Questions

- Which populations are the most important to target for training and education?
- How do we reach adjunct and part-time instructors?
- How do we facilitate referrals after hours?
- What information should I include in my presentations?
- Who should conduct BIT training?
- How often should we retrain our faculty and staff?

Key Components	
1	In-person training
2	Supplemental reference materials
3	Dedicated BIT website
4	Just-in-time reminders

Source: Advisory Board interviews and analysis.

The Forum's analysis demonstrates that BITs must develop training presentations that are simple and streamlined. These presentations need a core message that focuses on the questions people want answered when confronted with a distressed student, such as what to do in an emergency situation. The end goal of BIT training presentations is to convince faculty and staff to make a referral if they are concerned about a student.

Less Is More

Streamlined BIT Presentations Stick with the Audience

Key Presentation Questions

- What is concerning behavior?
- What do I do in an emergency?
- If my concern is not an emergency, what is the next step?
- What is the BIT?

Desired Outcomes for Attendees

- Ability to distinguish between disruptive classroom behavior and concerning behavior
- Knowledge of when to call 911
- Familiarity with BIT website and referral process
- Awareness of BIT members, mission, and general referral outcomes

EAB Training Recommendations

- Streamlined content
- Simple messaging and clear next steps
- Several mentions of referral methods
- Time for Q & A
- Emphasis on student success

Source: Advisory Board interviews and analysis.

While training sessions help communicate key information about the BIT, these presentations also play an important role in destigmatizing referrals. Some campus constituents may be skeptical about the team's purpose, downplay their concern because they aren't an expert, or fear that reporting a student will ruin their academic career. To alleviate these concerns, the Forum recommends positioning identification and referral as part of student success.

Shifting the Referral Paradigm

Emphasizing Student Success Helps Destigmatize Referrals

Status Quo

Focus on Threats to Campus

- "How to respond to an active shooter"
- "Mitigating threats to campus"
- "What to do in an emergency"

Ideal State

Focus on Success and Wellbeing

- "Early identification leads to rapid solutions"
- "Connecting students with campus resources"
- "How to create a positive classroom environment"

Changing the Dialogue from Punishment to Student Success

"Campus teams (including threat assessment teams) sometimes have to counter the misconception that 'reporting' someone to the team automatically results in adverse consequences (such as expulsions or punishment) or that such reporting constitutes inappropriate tattling or snitching."

The Jed Foundation and HEMHA,
Balancing Safety and Support on Campus

Source: The Jed Foundation, *Balancing Safety and Support* (2012); Advisory Board interviews and analysis.

Everyone at the institution has a vested interest in student success, which can make individuals more willing to look for concerns and submit referrals. Marketing the team under the heading of student success, however, requires that teams scrutinize their branding, examining elements such as group name, mission statement, language choices, and training content.

One institution that stands out as an exemplar is the University of Rochester, which has a comprehensive market and branding campaign focused on student success. Their message starts with the group's name (CARE Network) and runs through their imagery of the missing puzzle piece. To bolster campus awareness, the team has developed an extensive array of promotional items and giveaways for faculty, staff, and students, such as document flags, sticky notes, and puzzles.

Focusing on Student Success

The University of Rochester's CARE Network Marketing Initiative

"Do You Have the Missing Piece?"

Branding Campaign Connects Referrals to Student Success

- Post-It Notes with CARE logo
- Individual campus posters
- Puzzle pieces with contact information
- USB Bracelets
- Bookmarking flags with CARE logo
- Window and door stickers
- Postcards
- Dedicated website
- Targeted email pushes
- Cut and paste syllabus blurbs
- Magnets
- Quick reference cards

Source: University of Rochester CARE Network, at http://www.rochester.edu/care; Advisory Board interviews and analysis.

This extensive marketing educates people to contact the CARE Network any time they notice a student of concern.

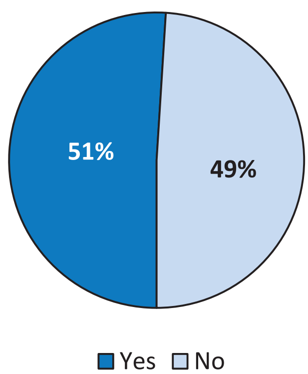
While training sessions are an important first step, people also need quick reference materials they can consult when they are worried about a student and contemplating next steps. One popular tactic for supplemental materials is the quick reference folder that many institutions have developed across the past few years. These folders are either given as training takeaways or mailed to all faculty and staff members annually.

Simple, Direct, and Visible

Supplemental Materials Provide Need-to-Know Information in a Pinch

Percentage of Institutions with Quick Reference Guides

EAB Analysis
n=44



University of South Carolina's Garnet Folder Initiative

- Launched in Fall 2010
- School colors make folder stand out on faculty desks
- Folder includes warning signs and clear next steps
- Recirculated through campus mail every fall to new faculty and staff hires

Garnet Folder Boosts Faculty Confidence

"I feel good knowing where to turn in case I ever encounter a difficult situation."

Faculty Member
University of South Carolina

Source: National Association of Student Personnel Administrators (NASPA) award document, "'Dealing with Distressing Student Behavior': University of South Carolina Publication Puts Critical Information at Faculty's Fingertips," at http://www.naspa.org/programs/awards/exwinners/Bronze981.pdf; Advisory Board interviews and analysis.

The University of South Carolina is one of the institutions who developed a quick reference folder. They launched their folder initiative in 2010 and distributed 5,500 folders to faculty and staff members in the first year. They continue to handout folders each fall at new faculty and TA orientation. Folders are also left in high-traffic offices such as the center for teaching excellence and the graduate school.

The University of South Carolina's garnet folder contains several key pieces of information including the signs of distress, an overview of the BIT, and clear next steps for emergency and non-emergency situations. The creation of the folder was spearheaded by the Communications Director in the Office of the Vice President of Student Affairs and the BIT chair. Other BIT members participated in the initiative by brainstorming distress signs and revising folder drafts.

Concise Information, Clear Next Steps

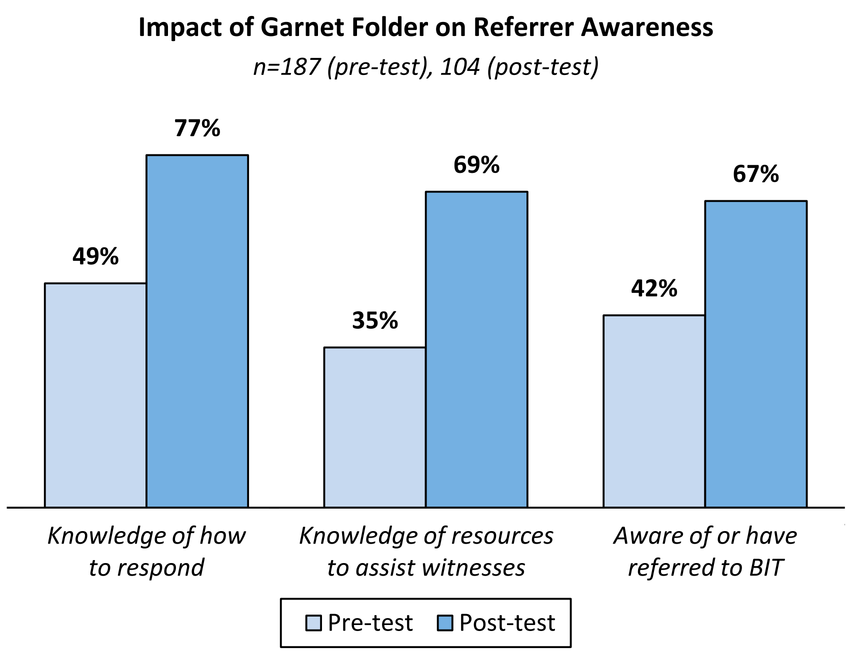
The University of South Carolina's Garnet Folder

Source: Folder image provided by the University of South Carolina; Advisory Board interviews and analysis.

As part of the folder's implementation, the University of South Carolina also administered a pre- and post-test to faculty and staff to assess the impact on community awareness. Their data showed that the quick reference folder substantially increased people's knowledge about resources for distressed students and their willingness to make a referral.

Significant Improvements in Faculty and Staff Awareness

Folder Increases Community Knowledge and Participation



Source: NASPA award document, "'Dealing with Distressing student Behavior': University of South Carolina Publication Puts Critical Information at Faculty's Fingertips," at http://www.naspa.org/programs/awards/exwinners/Bronze981.pdf; Advisory Board interviews and analysis.

While printed materials are important, many concerns arise after normal business hours when faculty and staff may not have ready access to their folders. Currently, it can be very difficult for someone to find a website solely dedicated to students of concern.

Responding to Concerns After Hours

Difficult to Find BITs Online

Not a 9-to-5 Job

"Students can get really distressed after hours when they're up late studying or trying to get work done. They reach out for help to a professor or administrator that they trust. We need to make sure that faculty and staff have a way to send information to us when they may be out of their offices."

Student Affairs Executive
Private University

Faculty Member Searches for Resources at Home

"Worried about a student"

"Concerning behavior"

"Threatening language"

"Students of concern"

"Student in distress"

Irrelevant Search Results

"PSYC 420 Treating Distressed Adolescents"

"Workshops on Managing Personal Stress"

"Faculty Directory: Find an Expert on Worrying and Anxiety Disorders"

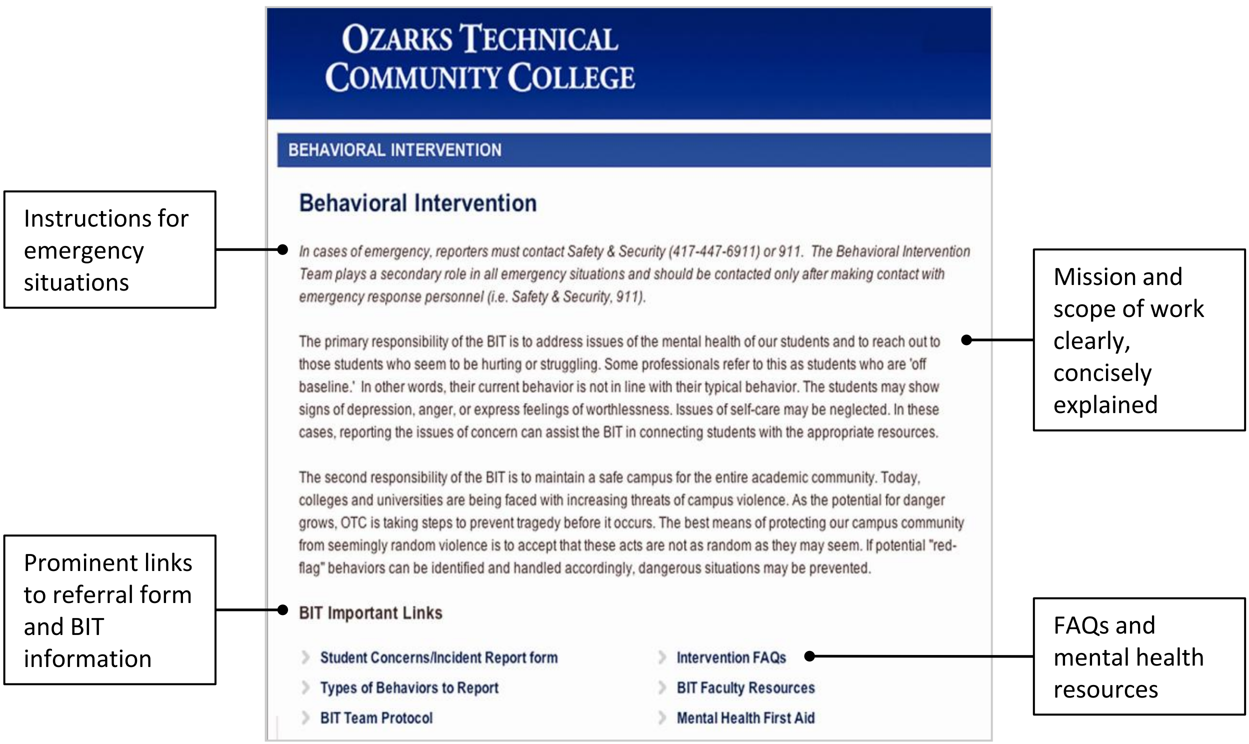
Source: Advisory Board interviews and analysis.

At most institutions, information about signs of distress, resources, and the BIT is distributed across several different websites, including counseling services, student conduct, and campus safety. The lack of a central online location for information causes people to delay reporting concerns or to give up altogether.

The Forum recommends that institutions create a dedicated BIT website that is easy to find online and contains key information. Ozarks Technical Community College's BIT website stands out as a best practice example. It includes a host of key elements such as links to the referral form, a clear statement of purpose, prominent instructions for what to do in an emergency, and links to additional resources.

Creating an Online Information Repository

Ozarks Technical Community College's BIT Website



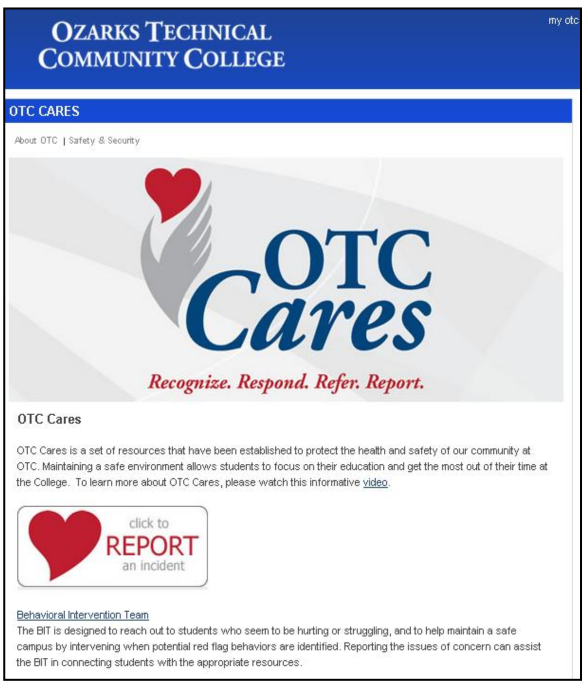
Source: Ozarks Technical Community College Behavioral Intervention Team web page, at https://www.otc.edu/safety/bit.php; Advisory Board interviews and analysis.

Once the institution creates a dedicated BIT website, it is very important to drive traffic to it. The Forum suggests that the website be prominently featured in all presentations, supplemental resources, and printed materials. The team should also work with university IT and other units to place prominent hyperlinks on high-traffic sites such as the counseling center, student conduct office, and campus safety.

Ozarks Technical Community College's BIT website is part of a larger student success campaign entitled "OTC Cares." The "OTC Cares" website serves as an umbrella for a variety of support services and resources including the BIT. Research contacts highlighted how the "OTC Cares" initiative also includes a prominent link on the institution's homepage, helping faculty and staff to easily make a referral.

Under the Umbrella of "OTC Cares"

OTC BIT Website Part of a Broader Student Success Campaign



Implementation Details	
Cost	Negligible due to in-house creation of webpage
Parties involved	BIT, Associate Vice Chancellor for Student Affairs, Vice Chancellor for Administrative Services
Links to BIT	• Counseling • Safety and Security • Referral button on OTC Cares home page (see left) • Direct URL to BIT
Analytics	Monthly reports from web services office that describe clickthroughs and visits
Content updates	BIT Chair and administrative assistant post new articles and policy documents relevant to BIT work

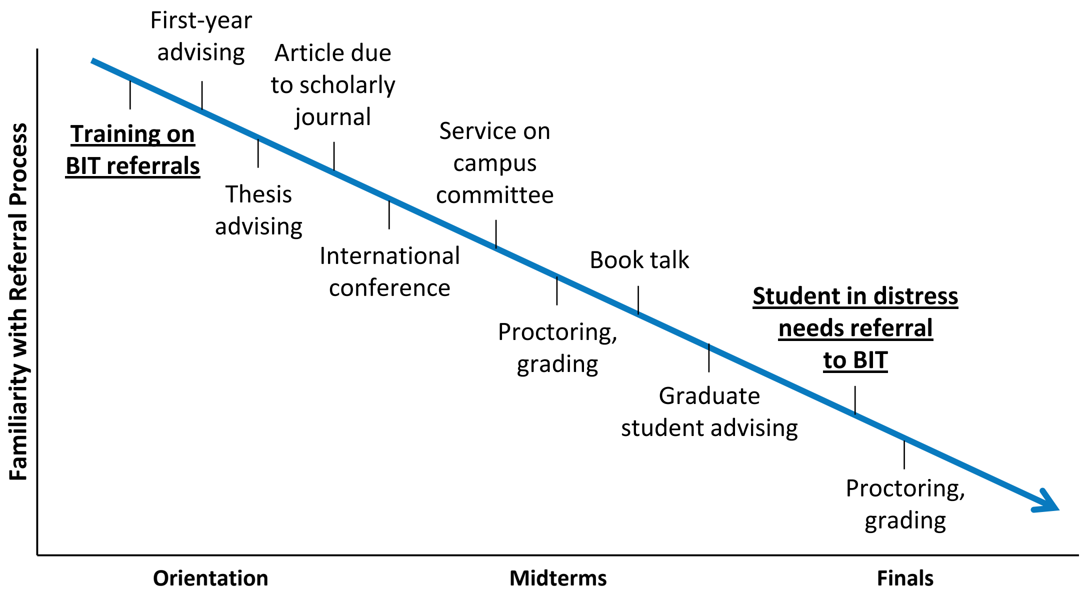
Source: OTC Cares web page, at http://www.otc.edu/otccares. Ozarks Technical Community College. Advisory Board interviews and analysis.

After establishing a good foundation with basic training and quick reference materials, the final component in a culture of referrals is frequent and ubiquitous reminders. Interviewees argue that faculty and staff need timely reminders about identifying students of concern, where to find information, and how it contributes to student success.

The Half-life of Faculty Training

Familiarity with Referral Processes Decreases Over Time

Timeline of Faculty Work across a Semester

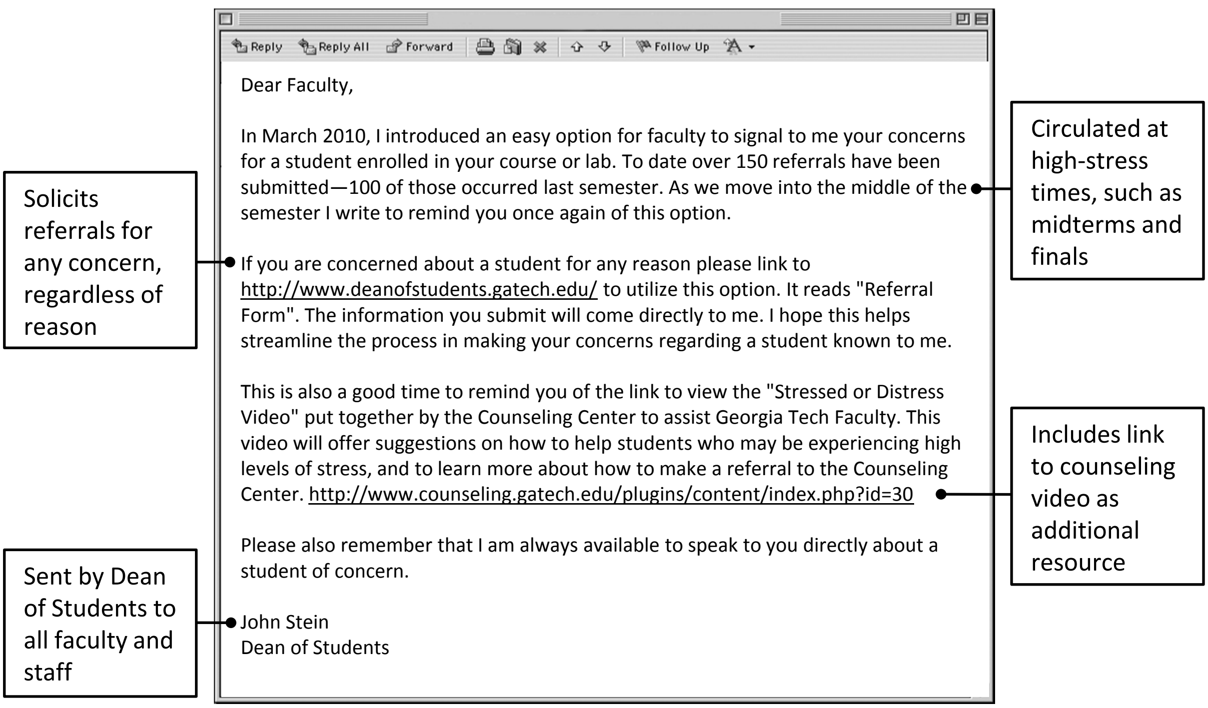


Source: Advisory Board interviews and analysis.

One institution that has taken a smart and effective approach to reminders is Georgia Tech. Once a semester at midterms, the Dean of Students circulates an email to faculty members that solicits referrals for any concern. The email also links faculty members to a short video that offers helpful insights into when a student may require additional support from campus resources.

A High-Profile Nudge

Georgia Tech's Reminder Email Drives Referrals


Dear Faculty,

In March 2010, I introduced an easy option for faculty to signal to me your concerns for a student enrolled in your course or lab. To date over 150 referrals have been submitted—100 of those occurred last semester. As we move into the middle of the semester I write to remind you once again of this option.

If you are concerned about a student for any reason please link to http://www.deanofstudents.gatech.edu/ to utilize this option. It reads "Referral Form". The information you submit will come directly to me. I hope this helps streamline the process in making your concerns regarding a student known to me.

This is also a good time to remind you of the link to view the "Stressed or Distress Video" put together by the Counseling Center to assist Georgia Tech Faculty. This video will offer suggestions on how to help students who may be experiencing high levels of stress, and to learn more about how to make a referral to the Counseling Center. http://www.counseling.gatech.edu/plugins/content/index.php?id=30

Please also remember that I am always available to speak to you directly about a student of concern.

John Stein
Dean of Students

Source: Email text provided by Georgia Institute of Technology; Advisory Board interviews and analysis.

The video was created in-house and features appearances by prominent university leaders including administrators from Student Affairs and Academic Affairs. Overall, the feedback on the video from faculty and staff has been overwhelmingly positive and interviewees anecdotally report that the reminders drive an influx of referrals to the Dean of Students office and the counseling center.

Connecting with the Campus via Online Video

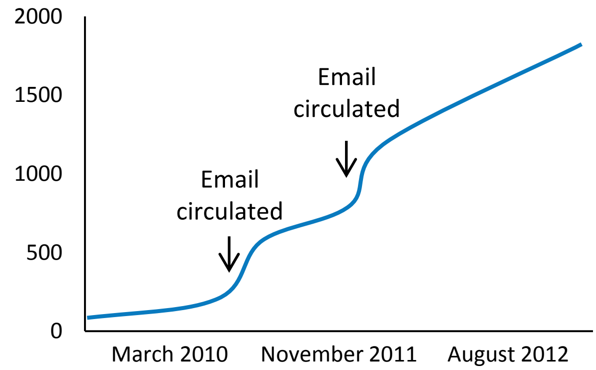
Participation of Senior Leaders Highlights the Importance of Referrals

Georgia Institute of Technology

"Stressed or Distressed" Video

- Runs for seven minutes
- Available on Dean of Students and Counseling Center websites
- Produced in collaboration with University PR office, one-time cost of $2500
- Includes appearances by:
  - Senior Vice Provost
  - Dean of Students
  - Director of Counseling Center

Number of Video Views on Dean of Students Website



To view the video, visit:

http://www.deanofstudents.gatech.edu/plugins/content/index.php?id=5

Source: Website analytics provided by Georgia Institute of Technology; Advisory Board interviews and analysis.

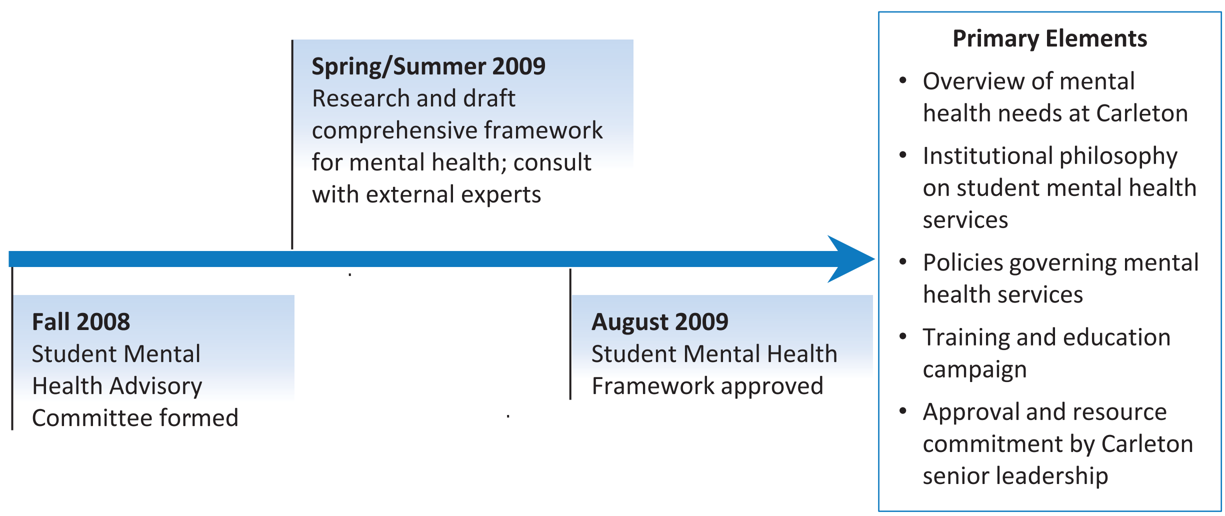
Practice #2: Role-Based Differentiated Training

As a first priority, the Forum recommends that BITs develop training presentations, quick reference materials, and just-in-time reminders for the entire campus. After that foundation has been established, there are certain areas, roles, and departments where more specialized training is necessary. The Forum's analysis reveals that few BITs currently provide tailored or differentiated training.

Articulating a Campus-Wide Approach to Mental Health

Carleton University's Mental Health Framework Sets Training Goals

Developing the Student Mental Health Framework at Carleton University



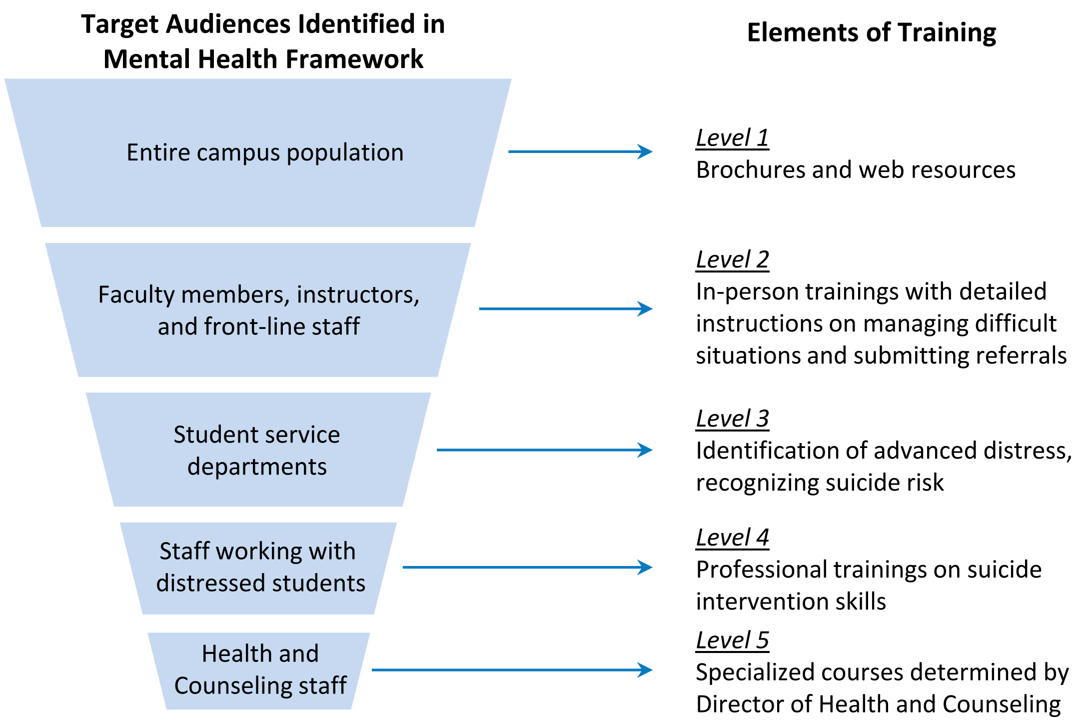
Source: Carleton University, *Student Mental Health Framework* (2009), at http://www1.carleton.ca/studentsupport/student-mental-health-framework/; Advisory Board interviews and analysis.

One institution that has demonstrated an impressive commitment to student mental health is Carleton University in Canada. During the Fall 2008 semester, Carleton formed an advisory committee that researched college student mental health needs and consulted with outside experts. The committee's work culminated in the creation of a comprehensive framework that includes an institutional philosophy on student mental health services, policies governing mental health services, and an overview of mental health needs on campus.

Carleton University also developed a multilevel training curriculum as part of the student mental health framework. Designed to be rolled out across several years, each level has a suggested audience, objectives, and dedicated content. Each level builds upon the previous one, providing greater detail and more targeted skill building for responding to students of concern.

A Multi-Level Approach

Carleton Tailors Training for Audiences Based on Roles and Needs



Source: Carleton University, *Student Mental Health Framework* (2009); Advisory Board interviews and analysis.

Since the framework's launch, more than 4,900 faculty, staff, and students have completed the level two training. The initiative has been a resounding success with positive feedback from campus stakeholders as well as increased awareness about the resources available for distressed students.

Shifting the Campus Culture

Multi-Level Training Yields Quick Wins at Carleton

4,900	$30K		
Faculty, staff, and students completed Level 2 training	Allocated to staff psychologist for education and training campaign	Increase in NSSE scores since campaign launch	Decrease in consultations with panicked employees

Making a Positive Impact

"The response to the student mental health framework and our training presentations was phenomenal…I have never seen anything like it. The Framework has driven a change in the culture on our campus. Our NSSE scores have gone up in terms of having a supportive campus environment each year."

Suzanne Blanchard
Carleton University

Source: Advisory Board interviews and analysis.

To address faculty and staff turnover and ensure there are no training gaps, Carleton's student mental health advisory committee creates a new communication plan each year to set goals for training and outreach. Key elements outlined in the plan include outreach material distribution, costs, and target audiences for training presentations.

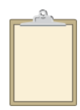
The Campaign Continues at Carleton University

Next Steps in the Education and Training Process

Broaden Campus Training Efforts

- Expand training for students
- Provide more role-playing scenarios for faculty and staff upon request
- Introduce new faculty and staff to the Framework

Develop Annual Communication Plans



- Identify training and outreach targets
- Share and build upon training best practices
- Identify assessment goals and track data

The Champions: Clinical Psychologist and Director of Health and Counseling Dedicated to Implementation

- Conduct training presentations
- Lead data collection and assessment efforts
- Work with senior Student Affairs officer to engage campus leaders

Source: Advisory Board interviews and analysis.

Finally, a critical element in the framework's launch and implementation at Carleton has been the dedicated clinical psychologist who works in close collaboration with the Director of Health and counseling. The dedicated clinical psychologist receives a budget and ensures the initiative keeps moving forward. As part of her role, she conducts training presentations, leads data collection and assessment, and works with senior leaders to engage the campus community.

Section II.

Branding One-Stop Referrals

Practice #3: Central Point of Contact
Practice #4: Post-Referral Communication
Practice #5: Referral Gap Analysis

Profiled Institutions

- University of Akron
- Harper College
- Virginia Tech

Diagnostic Questions

Branding One-Stop Referrals

The following questions are designed to guide members in evaluating their current referral process. Based on the number of affirmative responses, each member will fall into one of the categories on the opposite page. These categories can be used to identify tactics particularly well suited to member circumstances. Note: questions should be answered from the perspective of the BIT Chair.

Questions	Yes	No
1. Does a single person or team receive information about students of concern from faculty and staff?	❑	❑
2. Can referrers communicate with this person or team through multiple channels (e.g., web form, email, phone)?	❑	❑
3. Is information about referral channels housed on a dedicated BIT page within your institution's website?	❑	❑
4. Do referrers receive confirmation that their referral has been received and will be reviewed within a specified period of time?	❑	❑
5. If the original confirmation consists of an automated email, do you subsequently send a personalized email or call referrers to solicit additional information and reassure them that their concerns are being actively investigated?	❑	❑
6. Throughout the months following the referral, do you periodically touch base with referrers to ask about new developments and to communicate that your BIT is continuing to monitor the case?	❑	❑
7. Do you review aggregated case data to identify departments or units from which you receive the fewest referrals?	❑	❑
8. Do you use referral data to offer targeted programming and training to the departments and units that submit the fewest referrals?	❑	❑

Understanding Your Current State

Number of Yes Responses

0-2 Not Coordinated: Referrers receive little or no guidance on where and how to communicate their concerns, either due to inconsistent messaging or the lack of a single point of contact for referrals. Upon submitting a concern, referrers receive no confirmation that their concerns are being investigated, nor are they asked to relay further developments in the case to administrators.

The Forum recommends that teams in this category immediately implement a *Central Point of Contact* in order to consolidate information about students of concern and better coordinate the BIT's response. A well-developed and informative online portal is particularly essential to widening the referral pipeline.

3-4 Minimally Coordinated: Referrers receive some guidance on submitting referrals, but they still struggle to identify a single point of contact for their concerns. While an automated email may assure referrers that their concerns are being investigated, ongoing communication is extremely limited, undermining the information-gathering process.

The Forum urges teams in this category to focus on short-term strategies for *Post-Referral Communication* such as auto-reply emails or quick follow-up phone calls, to increase the usefulness of preliminary information and to build referrer trust in the team's response.

5-6 Moderately Coordinated: Referrers receive extensive information about communicating concerns to a single person or team, though awareness of this resource may still not yet be universal. Administrators contact referrers for a follow-up conversation after the submission of a concern, and may touch base periodically over the subsequent months.

The Forum advises teams in this category to invest in long-term tactics for *Post-Referral Communication* to demonstrate how the group manages students of concern over an extended period of time.

7-8 Highly Coordinated: Awareness of where and how to submit concerns approaches 100% on campus. Administrators conduct both short- and long-term follow-up with referrers to build trust in the referral process and to aid information-gathering efforts. Referral data is fully integrated into strategic outreach plans, thereby ensuring that training goes to the departments most in need of it.

The Forum encourages teams in this category to further refine their data collection and assessment efforts by implementing a *Referral Gap Analysis* to more accurately identify and support departments in the greatest need of training.

Forum research illustrates how BITs must build awareness of a single referral contact to be successful in their work. The status quo at most institutions, however, is that a person looking to make a referral is faced with a bewildering set of choices and options. Presenting referrers with a seemingly endless list of telephone numbers and units causes confusion and in some cases deters referrals.

"I Am Concerned. Who Do I Contact?"

Potential Referrers Typically Face an Array of Choices

"The student wrote some disturbing things about self-harm in his last essay."

"During office hours, the student admitted that she had been feeling a bit depressed and was dealing with some family issues."

"The student is just getting skinnier and skinnier. He has also looked very pale recently."

Students of Concern Referral Guide

If the student…		*Refer to…*
Seems depressed		Counseling Center
Misses class		Disability Services
Disrupts class	?	Campus Police
Acts violently		Residence Life
Stops eating		Academic Support
Smells of alcohol		Wellness Office

Difficult to determine right place to send the student

Source: Advisory Board interviews and analysis.

Referrers may choose not to report their concerns rather than alert the wrong campus unit or they may default to calling the counseling center which (due to privacy laws) may inhibit information-sharing across campus.

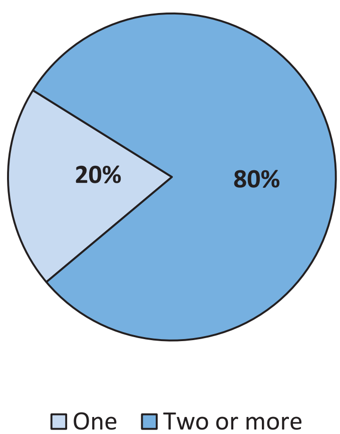
To make referrals as easy as possible, the Forum recommends designating a single point of contact for referrals and clearly identifying the channels through which referrers may submit concerns. There are a variety of channels available to collect information including phone hotlines, team email addresses, and online forms.

Widening the Referral Pipeline

Institutions Set Up Multiple Channels

Number of Referral Channels

EAB Analysis
n=58



Most Common Referral Channels

1. Phone call
2. Web form
3. Email
4. In-person consultation
5. Campus safety or housing reports

Getting the Information

"I want the information. However you get it to me, just get it to me."

Maureen McGuinness
University of North Texas

Source: Advisory Board interviews and analysis.

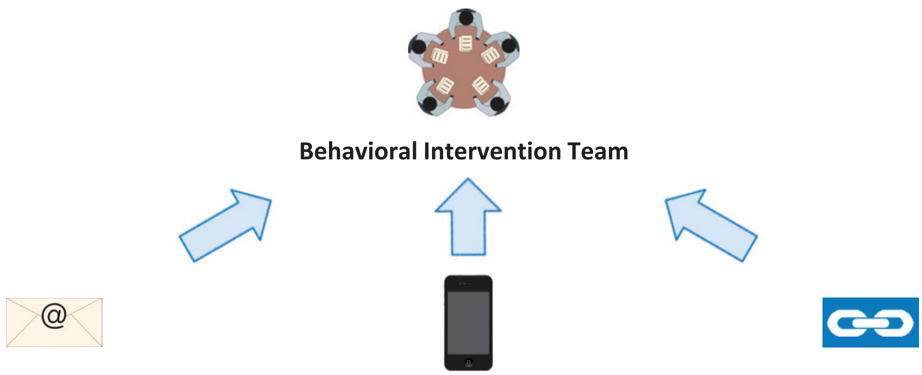
While BITs might be tempted to rely solely on a single channel for referrals such as email, interviewees stressed that some referrers (particularly faculty members) still want the ability to connect with somebody either in person or via phone.

Practice #3: Central Point of Contact

The Forum's analysis demonstrates how best practice institutions create a one-stop shop for a variety of referral channels. Research contacts revealed different patterns of channel usage with no real consistency across institutions. Given the variability of referrer preferences, the Forum suggests that BITs maintain multiple channels that all feed into the team's designated point of contact.

"All Roads Lead to Rome"

Best Practice Approach: All Referrals Funneled to a Central Location



Email Message

Allows referrers to send a detailed message 24/7 from any location

But referrers may submit incomplete information without question prompts

Phone Call

Allows for follow-up questions yielding relevant information

But limits referral times to business hours when staff members answer inbound calls

Web Referral

Guides referrers with prompts for key details embedded into the form

But raises questions about who receives the information as well as concerns about next steps

Source: Advisory Board interviews and analysis.

The Forum's analysis reveals that The University of Akron has developed a best-in-class referral portal. The Care Team's online portal contains information about the team and their process as well as a prominent button for the online referral form.

Creating a One-Stop Referral Portal

The University of Akron's CARE Team Website

Source: The University of Akron CARE Team web page, at http://www.uakron.edu/vpstudentaffairs/committees/care-team/; Advisory Board interviews and analysis.

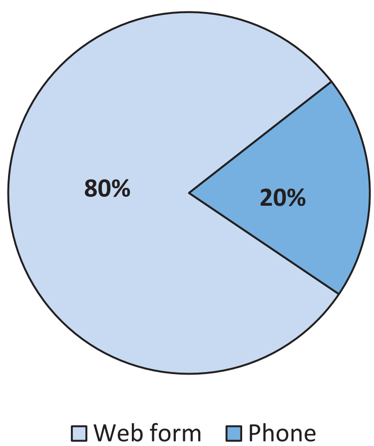
Recognizing that some people are skeptical about online forms, the portal also includes the names, pictures, and phone numbers for the team's co-chairs. This tactic puts a face on the referral system and reassures people the information is going to real people and not ending up unread in a random database.

Currently, Akron's Care Team receives approximately 80% of referrals via their web form. In order to boost that number even higher and increase community awareness, the team is prominently featuring the web portal in training presentations and outreach materials.

A Catch-all for Faculty Concerns

Web Referrals Predominate, Phone Referrals Serve Niche Segment

Distribution of Web and Phone Referrals at the University of Akron



Driving Towards the Web

"We are really encouraging those who refer by phone to circle back and complete the online form. We typically walk them through the process while on the phone…. [But] often times it just helps our community members to talk with someone on the front end while they are in the midst of a situation."

Denine Rocco
University of Akron

Source: Advisory Board interviews and analysis.

Practice #4: Post-Referral Communication

Beyond making the referral process easier to navigate, BITs must also build awareness and confidence among referrers. The Forum suggests that teams craft a post-referral communication designed to reassure faculty and staff that their information was received, provide next steps, and encourage further communication as needed.

Essential Components in Post-Referral Communication

EAB Analysis

Steering Clear of the Black Hole

"Faculty members wanted more information. They didn't want a black hole. They knew that they had turned in the report, but after that they weren't sure what happened. And when the student showed up back at class, they didn't know what was going on."

BIT Chair
Public University

Referral Follow-Up Key Elements	
1	Thank-you for the referral
2	Reassurance that someone is looking into the concern
3	General process next steps
4	Request that the referrer inform team of any additional developments

Source: Advisory Board interviews and analysis.

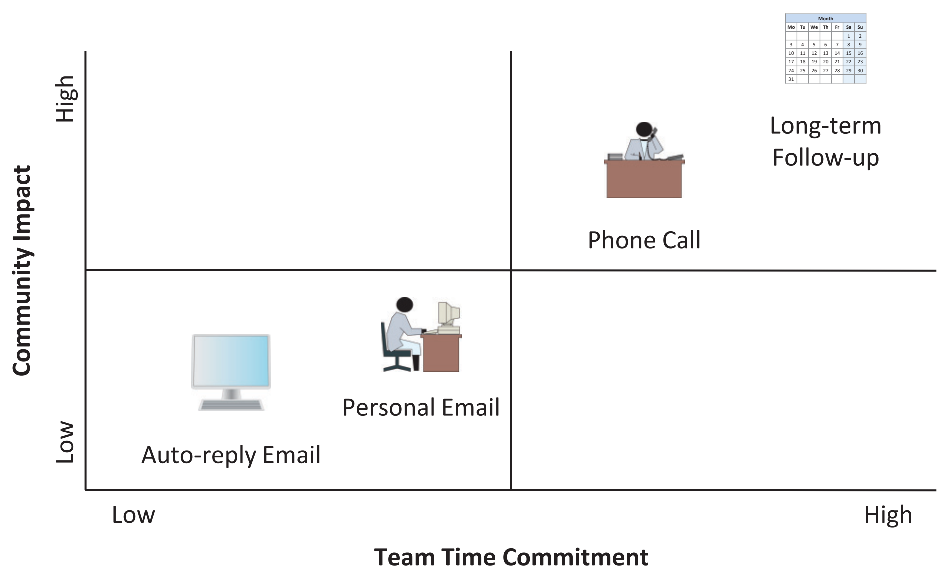
Research contacts assert that follow-up communication also serves as a useful education tool. As faculty and staff members submit concerns, they learn process next steps and increase the likelihood that the referrer will feel comfortable submitting another concern in the future or contacting the team with additional information about the current case.

The Forum's work reveals a range of options for implementing post-referral communication. When evaluating best fit methods for their institution, key elements for BITs to consider include time commitment, resource allocation, and community impact.

Closing the Feedback Loop

Different Strategies for Post-Referral Communication

Greater Time Investment in Follow-up Expands Community Impact

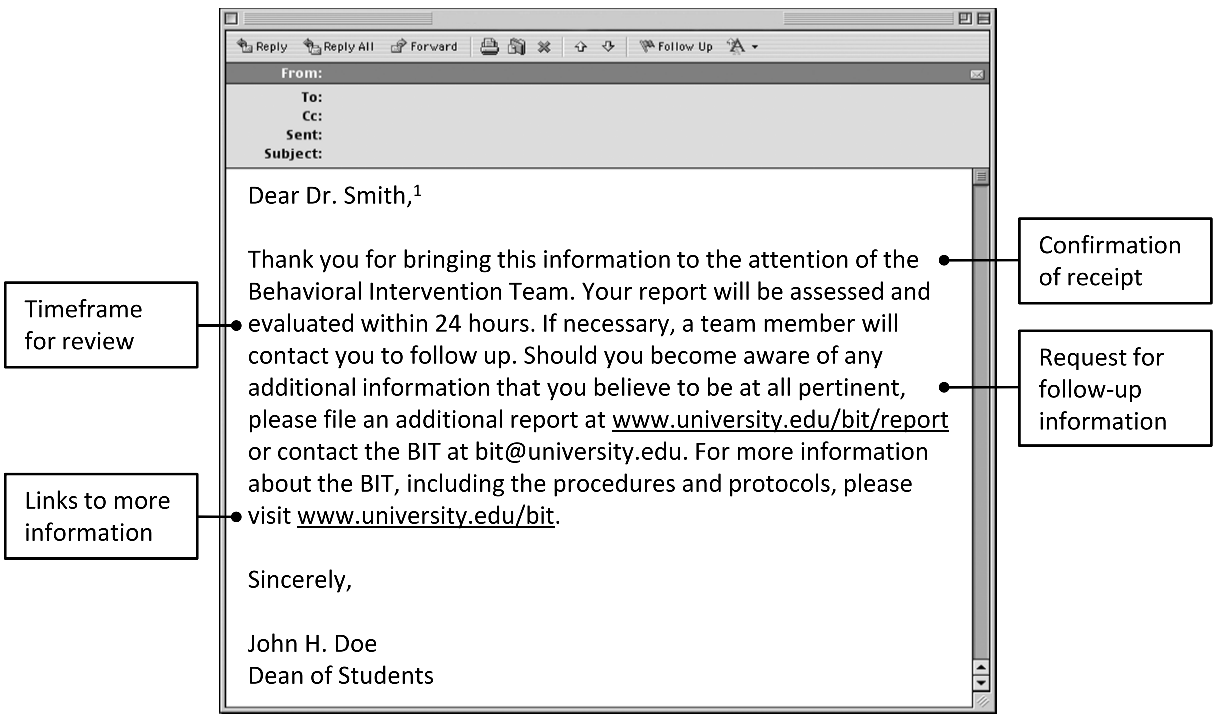


Source: Advisory Board interviews and analysis.

The least resource intense option for post-referral communication is an auto-reply message. For schools using a dedicated email address or an online referral form, this message is relatively easy to create. The Forum recommends teams interested in this approach review the example below that is adapted from NaBITA's recent publication, *The Book on BIT.*

Providing Instant Feedback

Auto-Reply Emails Establish Immediate Connection with Referrer


Reply Reply All Forward Follow Up

From:
To:
Cc:
Sent:
Subject:

Dear Dr. Smith,[1]

Thank you for bringing this information to the attention of the Behavioral Intervention Team. Your report will be assessed and evaluated within 24 hours. If necessary, a team member will contact you to follow up. Should you become aware of any additional information that you believe to be at all pertinent, please file an additional report at www.university.edu/bit/report or contact the BIT at bit@university.edu. For more information about the BIT, including the procedures and protocols, please visit www.university.edu/bit.

Sincerely,

John H. Doe
Dean of Students

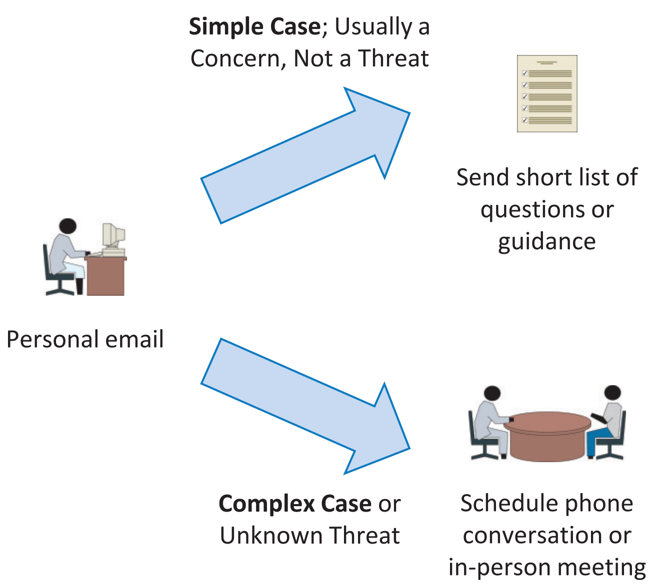
1 Text altered to illustrate example email.

Source: Adapted from Brett A. Sokolow et al., *The Book on BIT: Forming and Operating Effective Behavioral Intervention Teams on College Campuses* (NaBITA, 2012), 24; Advisory Board interviews and analysis.

While an auto-reply message is a quick and efficient way to acknowledge referrals, some institutions prefer to send a personal email or call the referrer after the concern is submitted. At Harper College, an auto-reply email is immediately sent to every referrer. By the end of the next business day, an administrator will also send the referrer a personalized email that either collects more information or sets up time to speak.

A Personal Touch at Harper College

Email and Phone Follow-Up Expands the Referral Conversation



Providing a Quick Touch

- Captures additional case details in a concise manner
- Reassures referrers that someone is aware of their concerns and is looking into the case

Initiating a Deeper Conversation

- Allows for more extensive information gathering
- Offers referrers an opportunity to share concerns and receive guidance

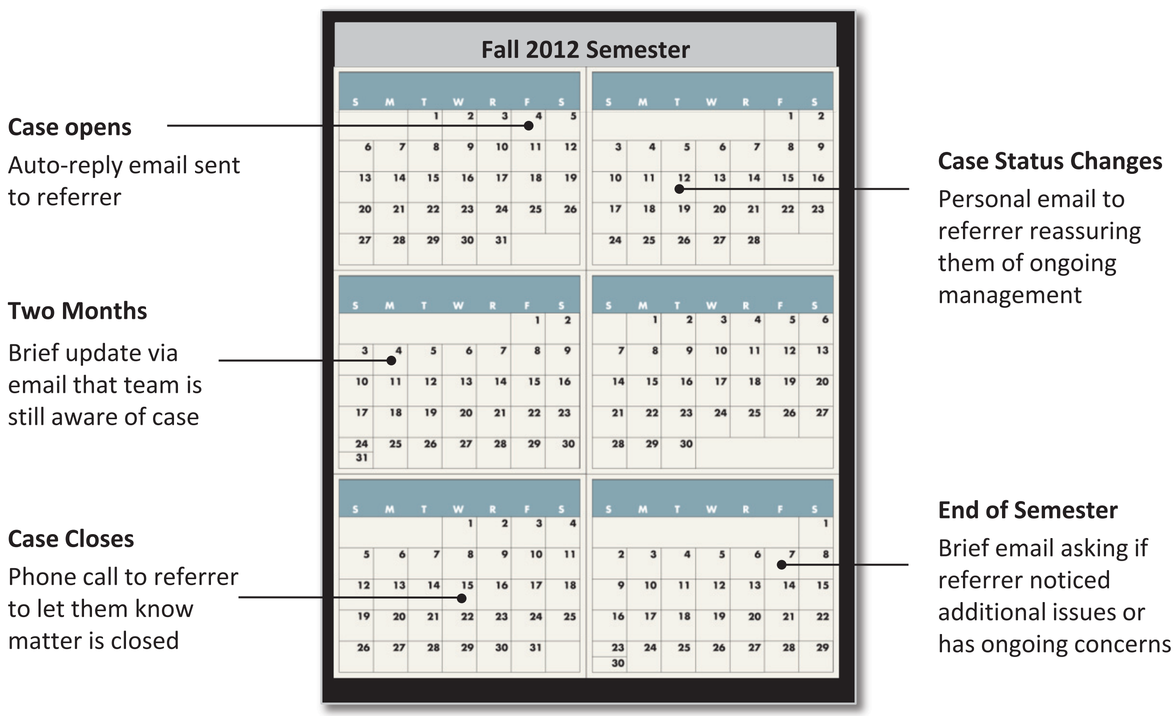
Source: Advisory Board interviews and analysis.

Interviewees at Harper report that this approach allows administrators to gather necessary information on low-priority cases without devoting too much time to follow-up. It also gives them the flexibility to dive deeper into high-priority cases and obtain valuable information through additional conversations. Overall, their approach creates a connection with the referrer, establishing a channel for further communication and consultation.

Experts suggest that BITs should also conduct a second outreach to the referrer when the case is closed or handed off for long-term tracking and management. Forum research, however, surfaced few examples of teams implementing a second outreach in a systematic manner.

Sustaining Engagement Beyond the Referral

Multiple Follow-Ups Yield Intel and Alleviate Concerns



Source: Advisory Board interviews and analysis.

The Forum believes that post-referral communication is an area where teams are still evaluating their options and refining strategies. We expect to see continued innovation and development in this area as teams look to reinforce community awareness and build trust in the BIT process.

Practice #5: Referral Gap Analysis

The Forum's analysis shows that the final component in a well-developed referral system is a mechanism to identify barriers and process inefficiencies. A gap analysis is one strategy well suited to helping BITs examine referrer data and highlight areas for improvement. To conduct this exercise, BITs must track the source, location, and type of referrals.

Identifying Referral Gaps

Using Data Analysis to Pinpoint Holes

Step 1:
Collect Referrer Data

Name

Title

Location

Type of Concern

Helps team members identify referral source, title, and location

Step 2:
Analyze Data

What are the major referral trends?

Are certain types of concerns associated with specific locations?

What populations are underrepresented?

Enables data analysis, highlighting referral trends, increases, and absences

Step 3:
Identify Referral Gaps

College of Engineering

Humanities Teaching Assistants

Frontline Staff in Academic Departments

Raises awareness among team members as to referral gaps and potential barriers

Source: Advisory Board interviews and analysis.

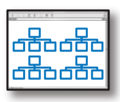
It can also be useful to gather information on referral channel to track trends around whether referrers are reporting concerns via phone, email, or online forms.

One institution that uses a form of the gap analysis is Virginia Tech where the Threat Assessment team regularly collects information about referrer source and location. This data is aggregated and incorporated into a presentation for senior administrators. Interviewees report sharing this information with key stakeholders not only increases community awareness but also starts conversations with various departments around targeted outreach and support.

Surfacing Opportunities for Targeted Outreach

Virginia Tech's Referral Tracking Initiative

Threat Assessment Team Tracks and Reviews Referral Data



Threat Assessment Team tracks the referrer source and location for all referrals

Team leader aggregates referrer data, highlighting trends and gaps

Team leader presents referral data analysis to senior administrators including the Provost and College Deans

Key Benefits

- Creates high-level visibility for the team's work
- Highlights departments or offices where targeted outreach may be needed
- Reinforces the importance of a community-wide referral process
- Fosters opportunities for collaboration across the institution

Source: Advisory Board interviews and analysis.

Finally, metrics from the gap analysis such as total referrals, top sources, and types of concerns can be woven into trainings, just-in-time reminders, and promotional materials, building community awareness of the BIT and fostering confidence in their work.

Section III.

Formalizing Team Processes

Practice #6: Procedures Manual

Practice #7: Role Definitions

Practice #8: Training Models

Practice #9: Performance Audit

Profiled Institutions

- College of Charleston
- University of North Texas
- University of Utah
- Aurora University
- Buffalo State College (SUNY)

Diagnostic Questions

Formalizing Team Processes

The following questions are designed to guide members in evaluating their current team processes. Based on the number of affirmative responses, each member will fall into one of the categories on the opposite page. These categories can be used to identify tactics particularly well suited to member circumstances. Note: questions should be answered from the perspective of the BIT Chair.

Questions	Yes	No
1. Does a formal policy statement or procedure manual establish the authority of the BIT, detail the team's membership, and outline its decision-making process?	❑	❑
2. Are BIT duties included in members' job descriptions?	❑	❑
3. Does a formal document (e.g., policy statement, team members' job descriptions) describe each member's responsibilities on the BIT?	❑	❑
4. Do BIT members receive periodic trainings on team procedures, legal and policy updates, and case-evaluation protocols?	❑	❑
5. Does the team use external resources, such as professional associations, webinars, publications, and regional partnerships, to supplement periodic trainings?	❑	❑
6. Do you evaluate team success through a performance audit?	❑	❑
7. After conducting performance audits, do you use the results to revise BIT protocols and improve team performance?	❑	❑
8. During school breaks, do you hold retreats at which your team may reflect on its strengths and weaknesses?	❑	❑

Understanding Your Current State

Number of Yes Responses

0-2 Not Formalized: The team lacks the infrastructure necessary for formal recognition and consistent operation across multiple years.

The Forum recommends that teams in this category immediately implement a *Procedures Manual* to formalize operations and increase team visibility on campus.

3-4 Minimally Formalized: The group operates with some basic infrastructure, such as a procedures manual, but does not write membership, time allocation, or duties into individual team members' job descriptions.

The Forum suggests that institutions in this category formalize membership on the team through *Role Definitions*, which provide recognition and awareness regarding members' duties.

5-6 Moderately Formalized: The team possesses a well-developed policy infrastructure, including a procedures manual and role definitions for members. However, the group lacks a regular plan for professional development and training, which is necessary to refine their work.

The Forum urges teams in this category to introduce *Training Models* to develop team members' ability to effectively evaluate and respond to student cases.

7-8 Highly Formalized: The group has a robust infrastructure that encompasses a procedures manual as well as ongoing training opportunities to continuously improve team dynamics and individual expertise. While the team conducts periodic reflection exercises, it may lack a formal model for reviewing its performance and identifying weak spots.

The Forum encourages institutions in this category to implement a *Performance Audit* to identify strengths and diagnose weaknesses, focusing the group's time on improving the most critical aspects of the BIT process.

In exploring team processes and efficiency, the Forum's work highlighted a surprising dearth of written guidelines and procedures. Interviewees stressed how not having this information creates inefficiencies in case assignment and management. It also creates potential complications when back-up committee members fill in and with team member transitions.

The Problem with "Doing Things Case by Case"

Teams Without Formalized Procedures Face Considerable Risks

Team Member Transitions

- Produces steep learning curve for new team members, complicating smooth transitions
- Fosters a lack of guidance for back-up and occasional team members

Process Hurdles

- Creates inefficiencies in case assignment and management
- Leads to reinventing the wheel for each case that the team handles

Liability Concerns

- Results in a lack of internal checks and balances
- Creates a situation where senior leaders are unable to reference standard process

Source: Advisory Board interviews and analysis.

Practice #6: Procedures Manual

The Forum's analysis surfaced the College of Charleston as having an excellent process to structure BIT work while still allowing flexibility for individual situations. In 2008, the College of Charleston developed a list of protocols that covered essential basics, such as team mission, membership, and decision-making processes. The document was further revised in 2011 and subsequently became a full policy statement that the institution's executive team reviewed and approved.

Providing a Framework for BIT Processes

Two Examples Highlight Scale and Span of Guidelines

COLLEGE of CHARLESTON FOUNDED 1770

Essential Elements
- Mission
- Team members
- Referral protocols
- Decision-making process
- Withdrawal and readmission standards
- Appeals policy
- Assessment strategy
- Threat assessment responsibilities

Length: 8-page policy statement
History: Written 2008, revised 2011
Contributors
- Dean of Students
- Counseling Center Director
- University Counsel

UNT UNIVERSITY OF NORTH·TEXAS

Essential Elements
- Mental health literature review
- Campus resources overview
- Education and outreach plan
- Team mission and purpose
- Decision-making flowchart
- Sample outreach materials
- Involuntary withdrawal procedure
- Data-entry requirements

Length: 72 pages
History: Written 2009
Contributors
- Vice President for Student Affairs
- Special Assistant to the Provost
- Dean of Students

Source: The College of Charleston, "Students of Concern Committee and Involuntary Withdrawal Statement of Policy," at http://policy.cofc.edu/documents/12.5.3.pdf; the University of North Texas, "Student Mental Health Task Force Report," at http://studentaffairs.unt.edu/sites/default/files/pdf/care/mh_report.pdf; Advisory Board interviews and analysis.

The Forum believes that for most BITs a document similar to Charleston's is right answer.

Depending on your institution and its culture, however, some teams may need to develop a more extensive manual. At the University of North Texas, for example, their CARE team has a 72-page document that establishes the foundation for their work. Developed over the course of a year, the manual includes team procedures as well as a literature review and a decision-making flowchart.

In addition to outlining the state of mental health on campus, UNT's manual identifies both core and occasional CARE team members, details a campus outreach plan, and includes sample documents. Overall, this document increases the visibility of the team and its processes on campus.

Another process inefficiency uncovered in the research involves BIT roles and expectations. Forum research illustrates that only a small number of chairs and even fewer team members have BIT work explicitly written into their job descriptions. All too often, it is a side of the desk job that is covered by "other duties as assigned."

"Other Duties As Assigned"

The Problem with BIT Work and Current Job Descriptions

Typical University Practice

BIT work is a "side of the desk" job that falls into the "other duties as assigned" portion of team members' job descriptions

Unintended Consequences

- Lack of recognition and compensation
- Difficult to quantify time spent on team duties and responsibilities
- Failure to acknowledge special skills and training needed for this work

Reluctant to Make "The Ask"

"The work we do is necessary but it isn't carved into team members' job descriptions here. I feel bad asking for more of their time to help with a case or to follow-up with a student because people are already overworked and my request [for the BIT] seems like an extra burden."

BIT Chair
Public University

Source: Advisory Board interviews and analysis.

Interviewees argue that this omission creates a range of problems including a lack of visibility for BIT work on campus and difficulty in capturing how much time is spent on team tasks.

Practice #7: Role Definitions

The Forum strongly recommends that all team members have BIT duties written into their job descriptions. Ideally these descriptions would include not only BIT membership but also specific expectations around meeting attendance, follow-up, and ongoing training as well as rough time estimates. Below are two examples of how BIT work can be integrated into job descriptions.

Clearly Defined Roles and Expectations

Embedding BIT Work into Job Descriptions

THE UNIVERSITY OF UTAH

BIT Director
Job Description
(Excerpt)

Primary Job Responsibilities

- Coordinate and manage the **Behavioral Intervention Team**
- Assesses concerning behaviors and provides recommendations for intervention
- Case manages students who have come to the attention of BIT
- Connects students to relevant support resources….

AURORA UNIVERSITY

Counseling Center Director
Job Description
(Excerpt)

Essential Job Functions

- Hire and supervise full-time and contract counseling staff
- Serve as a member of the **Behavioral Intervention Team (BIT)** to provide a systematic response to students whose behavior may be **(A)** dangerous or disruptive to themselves or other members of the university community or **(B)** in serious violation of Aurora University's Student Code of Conduct and to assist in protecting the health, safety, and welfare of the students….

Source: The University of Utah, "Dean of Students Annual Report 2010-2011," at http://studentaffairs.utah.edu/assessment/documents/annual-reports/annual-reports-2010-11/DOSO-annual-report-2010-11.pdf; Aurora University, "Counseling Center Job Description," at http://www.aurora.edu/hr/jobs/director-counseling.html#ixzz24CoywrdO; Advisory Board interviews and analysis.

Revising job descriptions for the entire BIT team, however, can be a daunting task to tackle all at once. As a result, some institutions have started by rewriting the chair's description first since it is usually the most complex role. Other colleges used a more gradual approach by integrating team responsibilities into job descriptions for new hires.

Tackling Revisions Gradually

Strategies for Phased Job Description Rewrites

Start at The Top

Focus initial efforts on the Chair's job description

"In doing the revisions, I went from overseeing three different offices and being the BIT Chair to now where I am spending 90% of my time fully dedicated to the BIT. My new job description reflects the change."

Leverage Team Transitions

Use team vacancies as an opportunity to revise duties

"All team members have BIT duties written into their jobs, but we made the changes gradually. As team members left and new hires were added, we integrated BIT responsibilities into their roles."

Revise at Promotion Time

Incorporate revisions into next-step promotions

"When I moved into my current role, the Vice President and I worked with Human Resources to edit the core competencies and essential duties so they matched the work I do on a daily basis."

Source: Advisory Board interviews and analysis.

Finally, a few universities folded revisions into promotions, changing the team member's essential duties when they make a role transition such as from director to executive director.

Defining BIT roles and expectations has several benefits for the team and the institution. First, embedding the work into job descriptions raises its visibility and legitimacy with campus stakeholders. Second, it recognizes the contributions that practitioners make, emphasizing how this work requires special skills and knowledge.

Although BIT members are typically individual experts in their areas, the group as a whole still requires regular training and periodic refreshers in order to function effectively. The Forum's analysis, however, demonstrates that few teams consistently implement an annual training program. Commonly cited barriers among interviewees include difficulty in finding time, limited resources, and lack of group buy-in.

Team Training, Great Idea in Theory…

…But Many Roadblocks in Practice

"We Are All Experts"

"Everyone on our team was selected because they are a subject matter expert. Many of them have been here for years. So they shouldn't need any training to do this work."

"Too Expensive"

"Our group would like to do training but we don't have any resources. There isn't a team budget for webinars, conferences, or outside consultants. "

"Difficult To Find Time"

"We all have other roles and commitments. As a result, we can't regularly find the time to get us all in a room for professional development and training."

Source: Advisory Board interviews and analysis.

Practice #8: Training Models

Experts argue that regular team training creates a strong foundation for BIT work and helps the group function effectively. As a result, the Forum urges teams to conduct training at least once a year and sees that as the bare minimum for process effectiveness. Whenever possible, the Forum suggests BITs consider implementing more robust training programs.

Ongoing Training, An Essential Part of BIT Work

Various Models Help Teams with Skill Development

Basic Model (Low Resource Investment)	Intermediate Model (Moderate Resource Investment)	Advanced Model (High Resource Investment)
Conducted Annually • Team Procedures • Member Roles and Responsibilities • Process Revisions • Legal Updates	Annual Basic Training PLUS • Policy Updates • Service and Resource Changes • Topical Webinars • Conference Attendance	Annual Basic Training, Intermediate Activities PLUS • Formal Conference Summaries • Internal and Community Guest Speakers • Outside Consultants

Improving Practitioners' Skills and Knowledge

"Just because someone is an expert in a specific area, such as counseling or student conduct, doesn't mean that they don't need additional training and education on how to do threat assessment work...It is important that all team members understand the group's purpose, scope, and process."

Gene Deisinger
Virginia Tech

Source: Advisory Board interviews and analysis.

The Forum recognizes that securing funds for BIT training can often be challenging for teams. Many interviewees noted that their group does not have an official budget so it can be difficult to secure resources for conferences, webinars, and onsite consultants. To help address this issue, the Forum recommends institutions leverage internal and community resources in order to provide targeted training and ongoing professional development for BIT members.

Looking Beyond the Institution to Boost Skills

Leveraging Regional and National Resources

Professional Associations

- National Behavioral Intervention Team Association (NaBITA)
- Higher Education Case Management Association (HECMA)

Webinars and Publications

- "Changes to the 504 Direct Threat Standard for Suicidal Students"
- *Ending Campus Violence: New Approaches to Prevention* (June 2012)

Online Communities

- Higher Education Case Managers (Google Group)
- NASPA's Knowledge Community for Campus Safety

Regional Partnerships

- Collaborate with local institutions to hire outside consultants for a joint symposium
- Organize regional sessions to share best practices and build staff member networks

Source: Advisory Board interviews and analysis.

The final component of an efficient BIT process is a mechanism to assess team performance. Forum research demonstrates, however, that assessing BIT performance is incredibly challenging due to the difficulties in quantifying non-events. As a result, few schools invest time and effort in evaluating team performance, assuming the existence of the BIT and the lack of major incidents means that they have a well-functioning group.

What Constitutes BIT Success?

Team Performance Difficult to Quantify and Evaluate

Success Often Represented By Non-Events…

There were no major crises on campus this semester. No headlines equals a good job by the team.

We de-escalated several situations and made a big difference to those students.

We play an important role in our institution's risk management initiatives.

…But That Definition Can Mask Underlying Issues

I don't speak up in team meetings because I don't think my viewpoint is relevant.

We are having a hard time communicating as a group and often just defer to the General Counsel's representative.

I don't understand why Counseling comes to these meetings if they don't share information with the group. Can't they provide any details?

Do we have a good process? Or have we been lucky that nothing terrible happened?

Source: Advisory Board interviews and analysis.

Throughout this research, interviewees touched upon a variety of problems with their BIT, many of which may not be readily observable to people outside the group. For example, they highlighted communication difficulties, undefined roles, personality conflicts, and unrealistic expectations as issues that often hinder teams in their work with students of concern.

Practice #9: Performance Audit

As a result, the Forum recommends that institutions review team performance on an annual basis. For example, Buffalo State College has developed an instrument designed to help BITs assess their strengths and areas for improvement. The instrument covers five main sections: team members, team process, operational concerns, working with key constituency groups, and developing team performance.

"How Can We Improve Our Performance?"

Buffalo State College's Self-Evaluation Instrument for BITs

Buffalo State
State University of New York

Annual Team Performance Audit

Details

Members evaluate group performance via quantitative questions and open-ended reflection exercises

Main Components

- ✓ Team Member Characteristics
- ✓ Team Process
- ✓ Ongoing Operational Concerns
- ✓ Working with Key Constituent Groups
- ✓ Developing Team Performance

Developing Team Performance *(Excerpt)*	**Rating 1-5 (Weak to Strong)**
Does your team conduct team development retreats or similar programs?	1 2 3 4 5
Does your team bring in outside experts to help address key topics of concern to the team?	1 2 3 4 5
Does your team encourage review of its effectiveness as needed during regular meetings of the team?	1 2 3 4 5
Are members of your team encouraged to obtain training in skills specific to certain aspects of your team's performance (i.e. database management, investigative interviewing, etc.)?	1 2 3 4 5

Source: Charles Kenyon and Karen O'Quin, "Developing Skills and Competencies for Behavioral Intervention Teams and Team Members," implemented at Buffalo State College (December 2011); Advisory Board interviews and analysis.

During 2011-12, Buffalo State's BIT used the diagnostic audit as part of their team retreats. In advance of the retreat session, the chair asked each team member to complete the instrument and submit their quantitative rankings and qualitative responses. After receiving the data, the chair reviewed the responses and built time into the retreat agenda to discuss the notable findings.

Carving Out Time for Reflection

Buffalo State's Team Discusses Evaluation Results at Mid-Year Retreat

Team Retreat Agenda
Winter 2012
(Excerpt)

- Welcome and Retreat Goals
- Discussion with SUNY Legal Counsel
- Care Team Self-Evaluation
- Marketing the Care Team
- Highlights of NaBITA Conference

Are We Succeeding?

"The instrument is meant to promote a conversation and elicit a sense of how the team is doing. It helps get at perceptions about where we need to grow stronger as a group and where we are succeeding."

"There are always going to be cases that take up an inordinate amount of time. Doing this type of self-evaluation [and participating in retreats] helps team members refocus and recommit to this important work that is added on to their regular duties."

Charles Kenyon
Buffalo State College (SUNY)

Source: Advisory Board interviews and analysis.

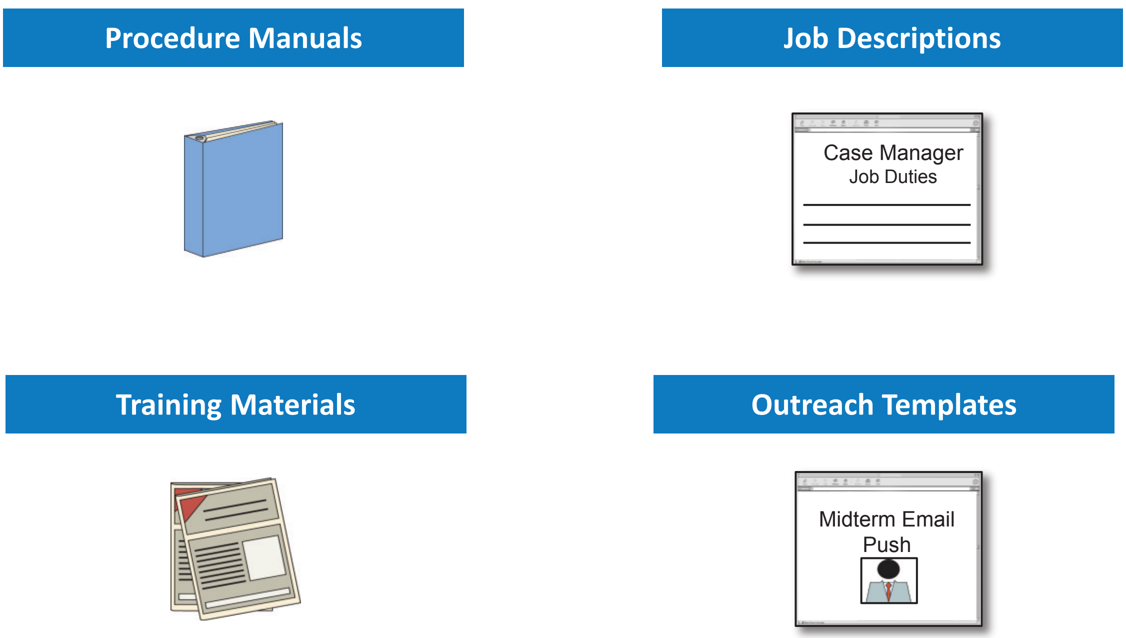
The group's discussion helped to pinpoint strengths, identify process barriers, and brainstorm areas where they wanted additional training. Interviewees suggest that carving out time to critically evaluate the BIT's performance and process has helped Buffalo State's team become more effective in their work.

Though Buffalo State College used a paper survey, the Forum believes that the team chair could deliver the survey electronically.

To help members refine their BIT processes, the Forum has created a resource center that includes tools and templates gathered in the research. It provides sample procedure manuals, outreach templates, and training materials. The resource center is available to members online via the Education Advisory Board’s website: eab.com.

Students of Concern Online Resource Center

Released January 2013, Available Online



Source: Advisory Board interviews and analysis.

Section IV

Consolidating Case Information

Practice #10: Referral Auto Alerts

Practice #11: Referral Escalation Manager

Practice #12: Pre-meeting Briefings

Practice #13: Case Recordkeeping Systems

Profiled Institutions

- Saint Joseph's University
- University of South Carolina
- Iowa State University
- College of Charleston
- University of South Florida
- UNC-Wilmington

Diagnostic Questions

Consolidating Case Information

The following questions are designed to guide members in evaluating their current recordkeeping initiatives. Based on the number of affirmative responses, each member will fall into one of the categories on the opposite page. These categories can be used to identify tactics particularly well suited to member circumstances. Note: questions should be answered from the perspective of the BIT Chair.

Questions	Yes	No
1. Are BIT members automatically alerted when a new referral is submitted?	❑	❑
2. Does your BIT maintain a structured agenda for regular meetings and distribute it to all members prior to the session?	❑	❑
3. Do team members review their office's records after receiving meeting agendas and share pertinent information about students of concern with the BIT chair?	❑	❑
4. Are low-level concerns referred to appropriate campus resource and closed before being discussed by the BIT?	❑	❑
5. Does your BIT use either a password-protected Microsoft Excel spreadsheet or a secure database to house BIT records?	❑	❑
6. Does the BIT recordkeeping system interface with the campus's student information system?	❑	❑
7. Are team members asked to update the recordkeeping system before meetings and after conducting case follow-up?	❑	❑
8. Has the BIT assigned one or more individuals to serve as recordkeeping system super users?	❑	❑

Understanding Your Current State

Number of Yes Responses

0-2 Minimal Information Management: The BIT keeps minimal records and does not encourage team members to review case information before meetings.

The Forum recommends that teams adopt a *Case Recordkeeping System* such as a password-protected excel spreadsheet or an electronic database to manage student case information.

3-5 Basic Information Management: The BIT keeps basic records about students of concern and team members prepare for meetings by reviewing case records.

Teams with basic recordkeeping strategies will benefit from adopting *Referral Auto Alerts* and *Pre-meeting Briefings* to facilitate rapid notification and information-sharing regarding new cases.

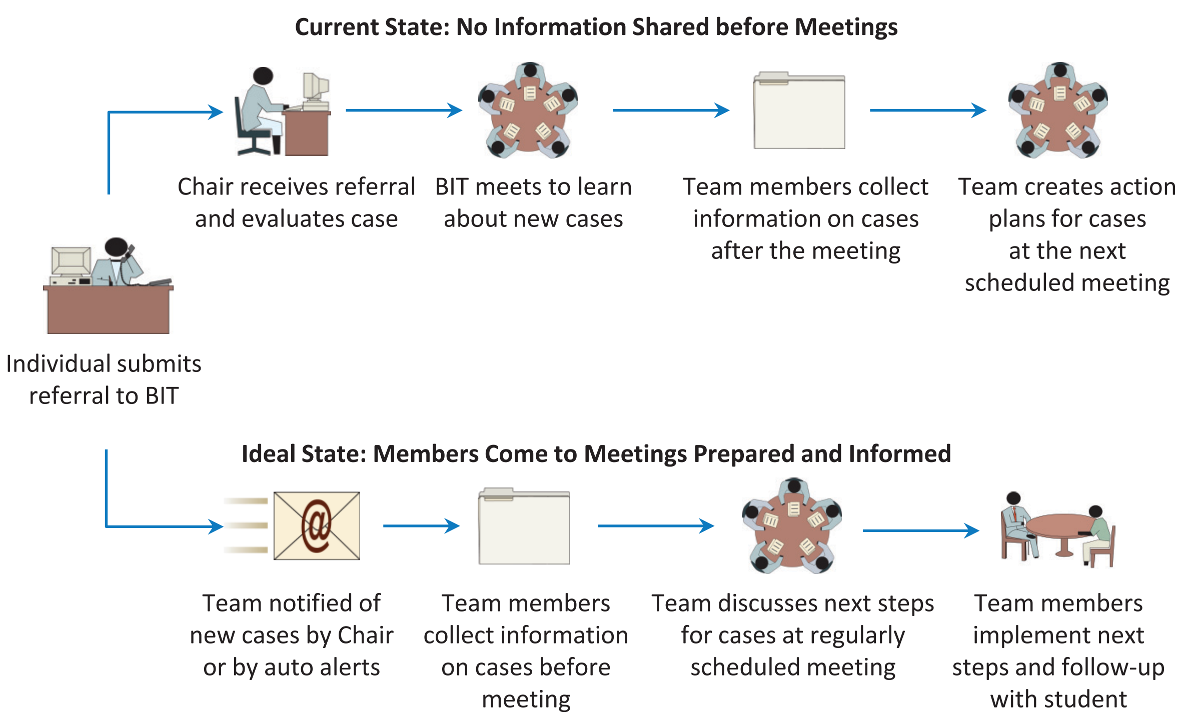
6-8 Advanced Information Management: The BIT uses a sophisticated database to track students of concern and analyzes key metrics.

The Forum recommends teams in this category leverage standard queries or customized reports from *Case Recordkeeping Systems* to regularly aggregate key metrics, allowing the groups to keep senior Student Affairs leaders as well other campus stakeholders informed about student trends and emerging populations.

The Forum's research illustrates how information gathering, communication, and follow-up with relevant campus stakeholders is one of the most time consuming pieces in responding to students of concern. At most institutions, the status quo is that little or no information about inbound referrals is shared with the BIT before the regularly scheduled meeting unless the situation is urgent.

Too Little Information, Too Much Time

Current Team Processes Delay Information Gathering and Follow Up



Source: Advisory Board interviews and analysis.

This approach not only delays the information gathering process but it also bogs down BIT meetings. As a result, the meeting discussions tend to focus more on coordinating student outreach, gathering key intelligence, and reporting findings, rather than proactively brainstorming next steps and action plans.

Practice #10: Referral Auto Alerts

In conducting this research, the Forum surfaced three ways to speed up BIT information gathering and communication. The first strategy is implementing auto-alerts to swiftly notify all group members when a referral is received through an online form or dedicated email address. These alerts can either be a copy of the referral form or a database notification that prompts team members to login to view the new case.

Instant Notification about New Referrals

Saint Joseph's University's Team Receives Automatic Alerts

What is the SJU Auto Alert Email?

A copy of the student of concern referral form sent to each team member

How Does It Happen?

- When a referral is submitted, the form converts to an email sent to each member
- Many members check email by phone, facilitating rapid response

What Are the Team Expectations?

- Review internal records for student interactions within 72 hours (usually in less time)
- Inform committee chair about key information prior to meetings

Saint Joseph's University Auto Alert Email[1]

Referrer Name and Contact Information	Dr. Jane Doe doej@university.edu
University Affiliation	Faculty
Student Name	John Smith
Description of Behavior	Disturbing content in academic work
Relevant Documents	See attached essay
Have you addressed your concern with the student?	No. I don't know how to approach the discussion. I would appreciate guidance.

[1]This form has been condensed and modified to fit on this slide.

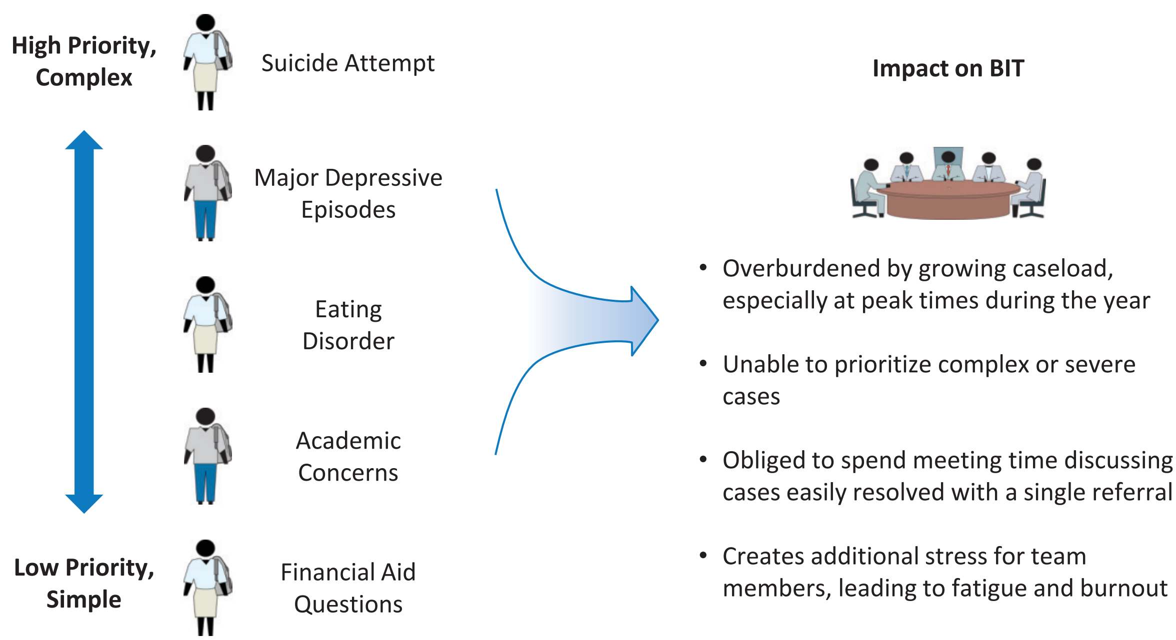
Source: Advisory Board interviews and analysis.

Once they received an auto-alert, BIT team members at Saint Joseph's University are expected within a defined timeframe to gather information from their areas and report their findings to the team's chair. Key benefits of this approach include faster information gathering and the ability to conduct more action-focused discussions during regular team meetings.

Even when teams use auto-alert messages to quickly notify the group and speed up the information gathering process, they usually struggle to redirect low-level cases to on-campus resources before the regular meeting. As a result, team meetings end up cluttered with various issues that do not need extensive discussion with the full BIT.

The Inefficiencies of Universal Care

Lack of Filter Makes BIT Workload Unsustainable



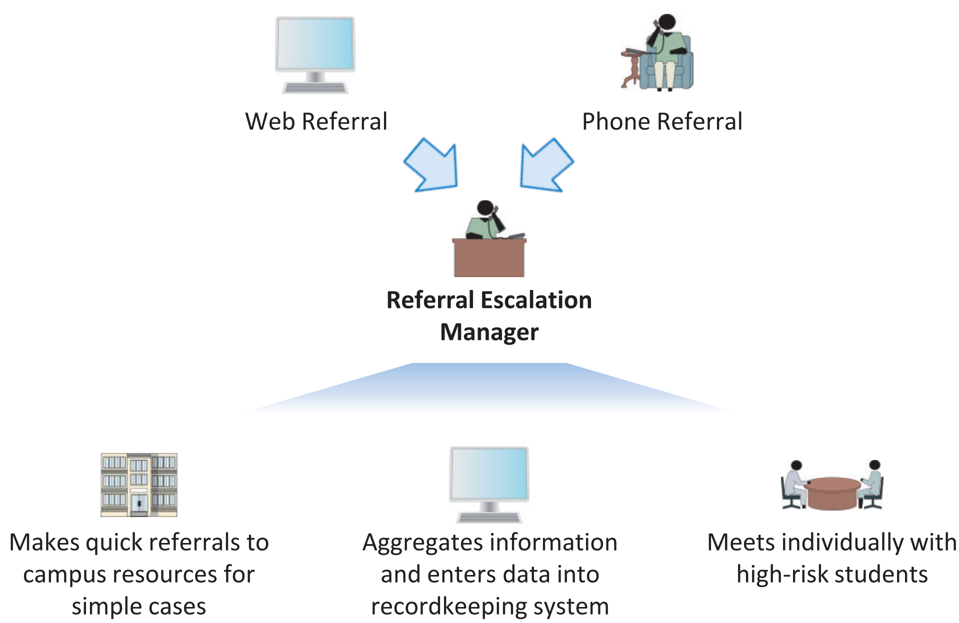
Source: Advisory Board interviews and analysis.

Practice #11: Referral Escalation Manager

The second strategy to improve the BIT information gathering process is to create a referral escalation manager. Forum research illustrates how best-in-class institutions designate a "first responder" for inbound referrals. This individual performs in a preliminary evaluation of case urgency, aggregates information from team members, and coordinates next steps for minor or routine concerns.

Delegating Initial Intake Responsibilities…

…Ensures Consistent Performance of Crucial Next Steps



Source: Advisory Board interviews and analysis.

In some situations, the escalation manager might meet with the student themselves while in other cases they might partner with residence life, athletics, academic advising, or another unit to leverage a pre-existing relationship with the student as part of the referral follow-up.

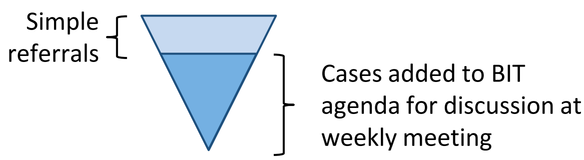
For higher priority or complex cases, the referral manager may reach out immediately to "get eyes on the student" and assess their current state in order to evaluate how and when to involve the broader BIT.

The referral manager also tracks information about the type of concern, follow-up actions, and case resolution so there is a historical record if the student re-emerges as a concern in the future.

Forum research surfaced two schools currently using different variations of the referral escalation manager, the University of South Carolina and Iowa State University. At the University of South Carolina, the escalation manager is the Director of Student Conduct, who also serves as the BIT chair. At Iowa State University, a small office of three full-time staff members handles incoming referrals and coordinates a response.

Rightsizing BIT Caseload

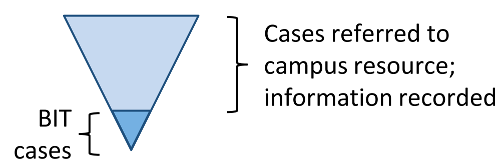
Escalation Manager Proactively Addresses Low-Level Cases



Simple Referrals Pulled Out of Queue, BIT Addresses Bulk of Cases

University of South Carolina

- Performed by Director of Student Conduct/BIT Chair, who spends at least 25 hours per week evaluating cases, tracking data, and communicating with affected parties
- 264 referrals in 2010-2011, 19 managed without assistance from BIT
- Allows for quick connections to other campus offices and resources
- Emails from Chair inform BIT of action steps for simple referrals, keeping lines of communication open



Assistance Staff Handles Inbound Referrals, BIT Focuses on Very Complex Cases

Iowa State University

- 3 FTE evaluate cases in the Office of Student Assistance and Outreach
- 1185 referrals in 2010-2011 to the Office of Student Assistance and Outreach; Student Assistance and Follow Up Evaluation Team (SAFE-T) informed of all cases
- Approximately 10 to 15 percent of cases merit in-depth involvement by SAFE-T
- Ensures cases SAFE-T discusses need multiple perspectives and viewpoints
- Focuses team meetings on most complex cases

Source: Advisory Board interviews and analysis.

Practice #12: Pre-Meeting Briefings

While resource constraints may prevent some universities from establishing a referral escalation manager, the Forum strongly recommends that every BIT implement pre-meeting briefings. This tactic requires the team to create a structured, regular agenda format for weekly meetings. Ideally the agenda balances discussion of new cases with updates on older cases and periodic check-ins on long-term cases.

Running a Best-in-Class Meeting

Structured Agendas Create Productive Discussions

Model #1

College of Charleston

- New cases *(45 Minutes)*
- Ongoing cases *(30 Minutes)*
- Policy discussion *(as needed)*
- Relevant current events discussion *(as needed)*

Model #2

University of South Florida

- Open cases (*60 Minutes*)
- Updates from the previous week (*as needed*)
- Discussion of relevant policy or procedural information (*as needed*)

Watching the Clock

"I have to be attuned to the time we have available. Every case has interesting dimensions, but our goal is to design next steps and keep on that path for the student. If you have time, then you can extrapolate those cases out or discuss future scenarios."

Jeri Cabot
College of Charleston

Source: Advisory Board interviews and analysis.

Once the team has developed a regular agenda format, the team chair is responsible for sending out the briefing at least two days in advance of the meeting. The Forum believes that this practice is a quick-win strategy that can immediately improve meeting efficiency and reduce team response time.

Using a pre-meeting briefing also sets the expectation that all team members will view the agenda, read any BIT notes, and check their unit's records, making them accountable for completing these key duties before the meeting. Interviewees who utilize this strategy emphasize how it creates a consistent meeting structure, front-loads information gathering, and ensures the BIT's time is spent on the most urgent and complicated cases.

Holding Team Members Accountable

Referral Briefings Set Expectations for Meeting Preparation

Implementation Question	Keys to Success
What should we include in the agenda email?	Minimal information such as: • Case file number • Student name or ID number • Brief description of concern for each case
When should we send the agenda?	At least two days in advance of scheduled meetings
What if we do not want to email the agenda?	Instruct team members to review the database or a secure shared document before regularly scheduled meetings

Team Responsibilities after Receiving Agendas

- Review office files to determine whether staff have interacted with the students
- Read relevant notes in team database or centrally located files
- Prepare information to share with team members at next meeting
- Notify the team chair immediately if the situation is escalating or an emergency

Source: Advisory Board interviews and analysis.

Across this research, poor and incomplete recordkeeping emerged as one of the most intractable challenges to improving BIT efficiency. Interviewees highlighted a variety of issues covering legal concerns, resource constraints, and implementation barriers as reasons why they do not currently have a central repository for case records and a regular process for data tracking.

"Should We Keep Records for BIT Work?"

Many Institutions Remain Hesitant to Keep Robust Files

Under Lock and Key

"I make everyone in the room give me their notes before they leave. I don't want notes outside of my personal files. There is just too much risk that someone will leave papers lying around. Besides, we don't have so many cases that I can't remember what we discussed last time."

Student Affairs Executive
Public University

Common Concerns about BIT Recordkeeping

- Fear of FERPA and HIPAA violations
- Scarce resources for building or buying a database
- Belief that database implementation and maintenance will consume valuable staff time and energy
- Resistance to integrating another information technology system

Source: Advisory Board interviews and analysis.

Practice #13: Case Recordkeeping Systems

The Forum's work illustrates how the growing volume and complexity of cases means that BITs must develop systems to record and track information about student cases. The Forum strongly recommends that all teams capture information about referrals, cases, and resolutions in a central repository. The basic information recorded for each case should include items such as student name, referrer, nature of the concern, and actions taken.

The Basic Necessities of Recordkeeping

EAB Research Reveals Key Metrics and Data Points for BITs

Experts Advocate for Thorough Recordkeeping

"Each campus BIT should maintain detailed records and minutes of BIT meetings, actions/interventions taken by the BIT, as well as all follow-up activities and interactions with students of concern. These records should be kept by the Chair in files (or partitioned databases) not intermingled with other campus records (e.g., conduct files, counseling records, etc.)."

National Behavioral Intervention Team Association
"The Book on BIT"

BIT Metrics	
Essential Data	
• Student name and ID # • Year • Major • Address • Date referred • Referrer name and contact data	• Nature of the concern • Case owner/point person • Actions taken • Current case status • Date closed (if case is closed)
Additional Metrics	
• Gender • Race and ethnicity • Greek status • Student athlete status	• Work study status • GPA • Home country • Time spent per case

Source: Sokolow et al., *The Book on BIT* (2012); Advisory Board interviews and analysis.

Institutions with well-established teams or those who want more robust records may wish to capture additional metrics for cases including gender, GPA, affinity group information, and home country. Teams can use these additional data points to assist with identifying population trends and making resource asks.

Forum research uncovered a variety of strategies for tracking and storing team records. One of the easiest and least resource intensive options is to track information via a secure Excel spreadsheet. For example at UNC-Wilmington, the case manager in the Dean of Student's Office keeps all BIT records in Excel. Key fields tracked in the spreadsheet include referral date, type of concern, and whether the case was brought to the institution's BIT.

An Inexpensive Recordkeeping Solution

UNC-Wilmington's Excel Spreadsheet

Case Manager Spreadsheet

Student Name	Student ID#	Date Referred	College	Year	Referral Source	Reason or Concern	SBIT	Withdrawal
Doe, Jane	914365873	08/23/12	Business	2014	Faculty	Self-harm	Yes	No
Smith, John	914365121	07/12/12	Engineering	2013	Student Affairs	Mental Health	Yes	Yes 07/20/12

Other Spreadsheet Fields

- Carried over from previous semester
- Consultation only
- Number of meetings with student of concern
- Number of calls with student of concern
- Conduct case
- Race and ethnicity
- Semester GPA
- Cumulative GPA
- Social/Behavioral Indicator (such as autism spectrum disorder)

Source: Advisory Board interviews and analysis.

The Excel spreadsheet is password-protected and the case manager is the primary user. The Dean of Students also has access to the document.

Forum analysis reveals that a password-protected Excel document is the most basic form of centralized BIT recordkeeping. The Forum recommends that teams consult with senior Student Affairs leaders, representatives from the General Counsel's office, and the IT department before implementing this tactic. To help you consider whether BIT recordkeeping in Excel is right for your institution, the pros and cons of this approach are outlined below.

Choosing the Low-Cost, Flexible Option

Excel Allows for Quick Customization but Creates Challenges over Time

Using Excel for BIT Records	
Pros	• No cost to implement • Customized to individual team or chair preferences • Flexible system, easy to change • Rapid report generation
Cons	• Difficult to maintain consistency of information across cases and years • Reports must be manually created • Difficult to teach system to more than a few team members • Access limited to one individual at a time • Limited privacy and security safeguards

Difficulties with Multiple Years of Data

"I can sort the spreadsheet however I want more quickly. I don't have to wait on anyone else. If the Vice Chancellor for Student Affairs wants the data today, I have to be able to get it to her today."

"I keep last year's spreadsheet open right next to this year's. Once your years of service exceed the number of screens you have, you could be in trouble."

Crystal Hollenbaugh
The University of North Carolina at Wilmington

Source: Advisory Board interviews and analysis.

While Excel is a low-cost and flexible option for BIT tracking, Forum research highlights a growing trend for teams to use a vendor database for recordkeeping. These third-party systems aim to make data entry, case tracking, and reporting more consistent and efficient for teams. Currently, there are a range of companies offering "off the shelf" solutions for college and universities.

A Growing List of Recordkeeping Systems

EAB Research Identified Various Databases for BIT Work

Notable Database Vendors

StarRez

Maxient

Symplicity Advocate CARE

Moxie Software

Red Flag by Risk Aware

Titanium Software

Awareity

Source: Advisory Board interviews and analysis.

The Forum also surfaced a handful of examples of institutions using homegrown databases. Although these systems can be challenging to build and maintain, interviewees highlighted how homegrown systems allow institutions to tailor databases to their exact assessment needs and security specifications.

Maxient and Symplicity emerged as the top vendor solutions among Forum research contacts. Common elements among third-party systems include customizable user rights, online reporting forms, on-call technical support, and the ability to connect with the institution's student information system (SIS).

At the Front of the Pack

Maxient and Symplicity Emerge as Top Systems Among Interviewees

Current Recordkeeping Systems

EAB Analysis

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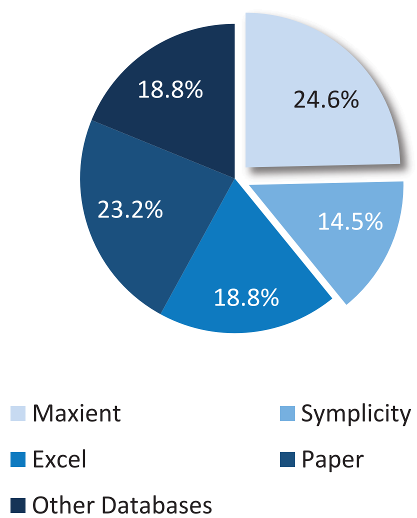


Common Vendor Database Elements

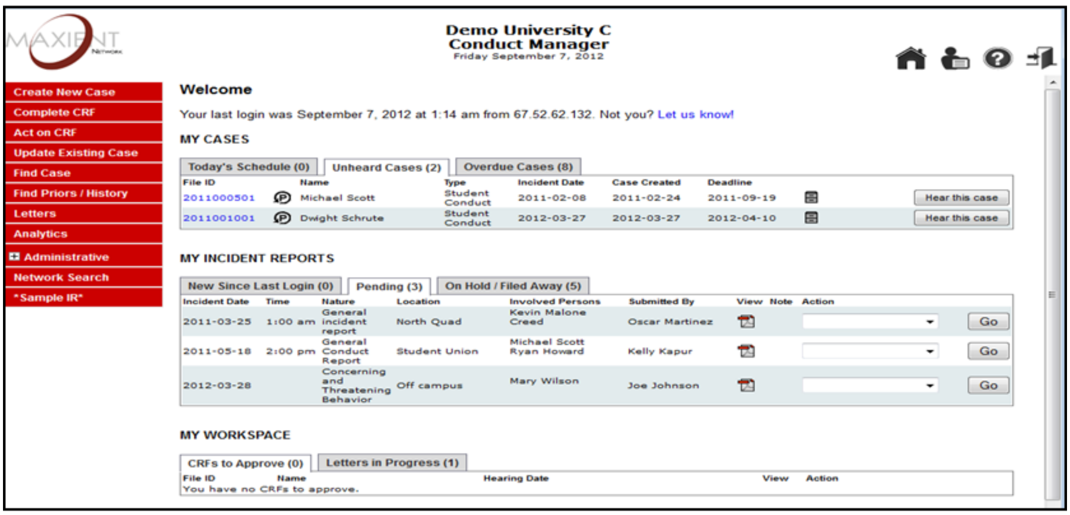
- Allows teams to create online referral forms with tailored fields for data entry
- Includes customizable user rights and access levels for team members
- Comes with standard queries for reports and data analysis
- Provides easy display of open cases
- Houses records on vendor servers for security and frequent system backups
- Connects with student information systems (SIS)
- Includes technical support on-call

Source: Advisory Board interviews and analysis.

Created by practitioners with extensive experience in student conduct, Maxient initially began as an online system for judicial affairs cases. Since its launch, Maxient has expanded the system to include behavioral intervention work, helping to ease recordkeeping and tracking burdens for campus teams. Interviewees emphasized highly customizable user rights, automatic alerts, and outstanding customer service as some of the key benefits in working with Maxient.

Building on a Conduct Background

Maxient Expanding to Serve Behavioral Intervention Teams[1]



Key Features

- Extensive user access controls, allows institutions to customize who sees different types of cases and incidents
- Read-only audit record of all activity within the system
- Automatic notifications via email or text message, alerting team members about incident reports and cases
- Letter templates for contacting students of concern

[1] Maxient screenshot is proprietary material. Do not duplicate or share without express, written permission from vendor.

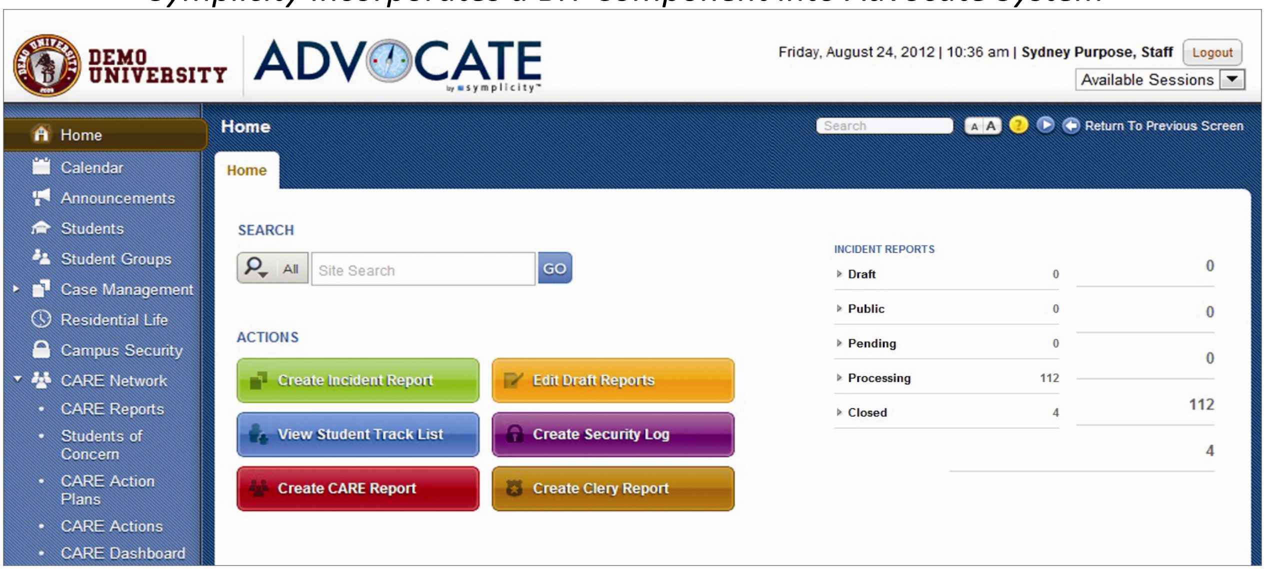
Source: Maxient, at http://www.maxient.com/; Advisory Board interviews and analysis.

The system also records all activity in a read-only file, a feature the Forum found particularly useful. In case of lawsuits or records requests, administrators can review the system's audit trail to determine who interacted with the system, when, and how.

Symplicity's CARE Module is part of their broader suite of products for colleges and universities. Created as an add-on to the Advocate system, the CARE Module allows universities to capture and track BIT work. Interviewees pointed to the interactive dashboards and preloaded reports as key benefits as well as staff members' familiarity with Symplicity's interface through their products for other units such as career services or residence life.

The CARE Module

Symplicity Incorporates a BIT Component into Advocate System[1]



Key Features

- Homepage automatically populated with data on students of concern
- Prominent indicators of cases that include multiple reports
- Ability to generate reports based on any metric stored within the system
- Ability to generate surveys for students with closed cases

[1] Symplicity screenshot is proprietary material. Do not duplicate or share without express, written permission from vendor.

Source: Symplicity Corp., at http://www.symplicity.com/; Advisory Board interviews and analysis.

The CARE Module also includes a student survey feature, which allows teams to automatically send surveys to students when a case closes so they can get feedback on his or her experience with the process. Although practitioners may not wish to use this functionality in every case, the Forum believes this feature might help teams ramp up their assessment efforts and collect systematic feedback from students who interacted with the BIT.

The Forum's work demonstrates that choosing a BIT recordkeeping system is only the first step. To have a successful implementation, teams must make a commitment to use the database on a regular basis and to track information in a consistent manner. Interviewees also stress the importance of a developing a superuser who can ensure the campus gets maximum value out of the system. This person can help answer basic questions, run reports, and train new users on the system.

Implementing a Successful Recordkeeping System

Lessons Learned from Fellow Practitioners

Team Commitment

- Dedicated training and refreshers for all team members
- Clear expectations that team will review notes in the system

Administrative Champion

- Multi-year resource commitment to fully incorporate system into team processes
- Strong encouragement to report data and assess BIT efforts

Campus Superuser

- An expert user who maintains records, runs reports, and answers questions
- Main point of contact for database vendor or campus IT department

Time-saving Tips

- Set deadlines for all team members to submit notes to Chair
- Type BIT meeting notes about individual cases directly into system

Source: Advisory Board interviews and analysis.

Overall, the Forum believes that the key benefits of recordkeeping (such as an audit trail, historical records, and longitudinal data) make this tactic worthy of serious consideration by colleges and universities across North America. As a result, the Forum recommends that members evaluate recordkeeping systems including Excel spreadsheets, homegrown databases, and vendor products in order to identify a method that fits best with their team, mission, and institutional culture.

Section V

Monitoring Complex Cases

Practice #14: Student-Facing Case Management

Practice #15: Ongoing Case Review and Tracking

Profiled Institutions

- Harper College
- University of Miami
- Iowa State University
- University of South Florida

Diagnostic Questions

Monitoring Complex Cases

The following questions are designed to guide members in evaluating their current approach for managing complex cases. Based on the number of affirmative responses, each member will fall into one of the categories on the opposite page. These categories can be used to identify tactics particularly well suited to member circumstances. Note: questions should be answered from the perspective of the BIT Chair.

Questions	Yes	No
1. Does your BIT assign cases to team members based on their previous interactions with a student and/or on their expertise in dealing with the student's specific concern(s)?	❑	❑
2. Does your institution employ a dedicated case manager outside of Counseling Services?	❑	❑
3. Does the assigned lead or case manager have clearly defined responsibilities for following up with the student, recordkeeping, and updating the BIT?	❑	❑
4. If your institution has a dedicated case manager in Student Affairs, does this individual provide regular reports about interactions with students of concern, campus outreach efforts, and consultations with the BIT?	❑	❑
5. Does your team maintain a list of high-priority, ongoing cases that are reviewed regularly in BIT meetings?	❑	❑
6. Is the BIT notified about students who have withdrawn from the institution if the reason for withdrawal falls under the team's mission and responsibilities?	❑	❑
7. Before a student of concern returns to campus, does the BIT make a recommendation about the student's needs for future academic and personal success?	❑	❑
8. Is the BIT's role in supporting students returning from leaves written into its policy statement or procedures manual?	❑	❑

Understanding Your Current State

Number of Yes Responses

0-2 Minimal Case Management: The BIT chair handles the majority of follow-up and management for long-term cases.

The Forum recommends that teams at this level adopt the *Assigned Case Leads* strategy to reduce the burden on the BIT Chair and spread long-term cases among team members.

3-5 Basic Case Management: BITs either employ a dedicated case manager or assign cases among team members based on "best fit."

Teams with basic case management strategies should consider hiring a *Dedicated Case Manager* and begin holding *Semester in Review Sessions* to prevent long-term cases from falling off the BIT radar.

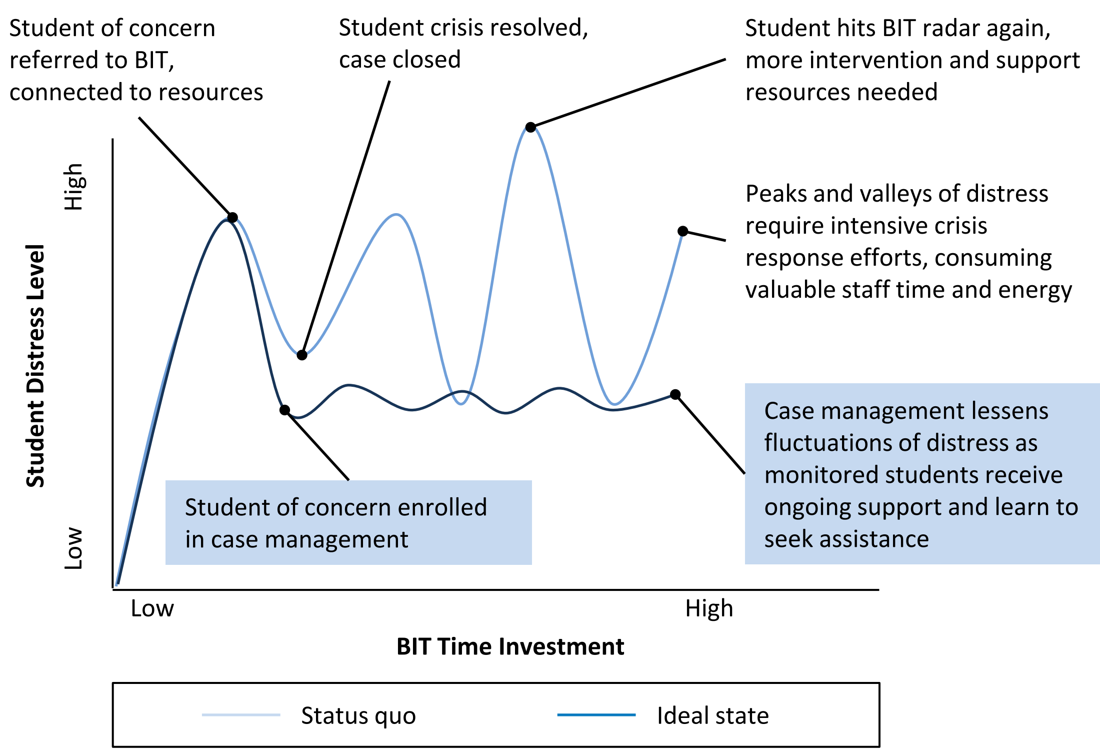
6-8 Advanced Case Management: The institution employs one or more case managers outside of the Counseling Center. These individuals facilitate BIT activities and coordinate resources for students of concern.

The Forum recommends that institutions in this category consider implementing monthly case manager reports to understand emerging trends and ensure that this individual is not overwhelmed with low-level tasks. Some universities may also wish to consider setting up a *Dedicated Student Assistance* Office to manage a wide range of student concerns, behavioral intervention needs, and threat assessment/management.

The Forum's analysis suggests that BITs are seeing growing numbers of frequent fliers and complex cases, situations that require more time, ongoing support, and increased coordination between various constituencies. If left unchecked, these trends have the long-term potential to overwhelm campus teams.

The Frequent Flyer Problem

Ongoing Cycles of Distress Consume Disproportionate Share of Resources



Source: Advisory Board interviews and analysis.

As a result, some Student Affairs executives are starting to recognize that the BIT as a full group is not the most efficient or effective resource for conducting regular follow-up and support for these extreme cases.

Practice #14: Student-Facing Case Management

Forum research shows that innovative institutions are increasingly developing supplemental resources with the time, bandwidth, and skill set to monitor long-term and complex cases. The Forum's work reveals two models for providing this type of care: Assigned Case Leads and Dedicated Case Manager.

Expanding Case Management Models on Campus

EAB Research Highlights Two Primary Approaches

Model #1
Assigned Case Leads

Utilizing Team Member Expertise

"Having a case manager is a terrific idea, but there is a problem. That person is the go-to person for all threat assessment and management…You need lots of people for case management, not just one person…Each case deserves its own data. That data needs to be looked at in terms of who's the best manager."

Jeff Pollard
George Mason University

Model #2
Dedicated Case Manager

Full-time, Dedicated Support

"The ideal system would have an administrative and a clinical case manager. With a clinical case manager, you get the benefit of confidentiality and coordination of off-campus care. An administrative case manager provides feedback to the BIT and helps with students already on the radar. Someone has to provide follow up, and a case manager helps with the tremendous need for administrative support."

Erica Woodley
Tulane University

Source: Advisory Board interviews and analysis.

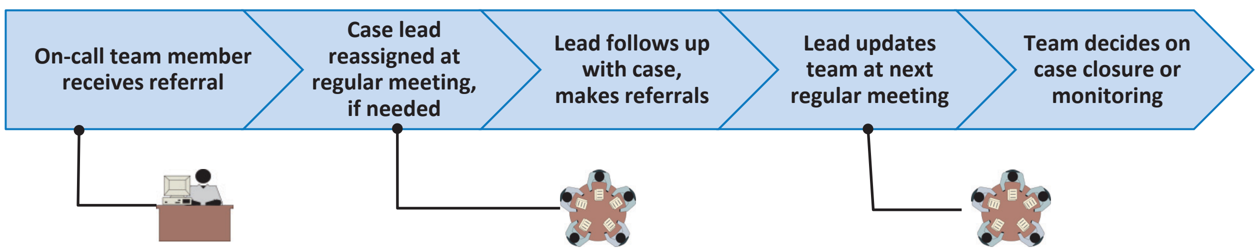
In Model 1, the BIT works as a group to select and assign a case lead for the student. This person is usually a BIT team member but in some cases might be someone outside the team based on a pre-existing relationship with the student or specific skill set. The case owner is then responsible for student outreach, follow-up with campus and local community, updates to the BIT, and recordkeeping. When the case is formally closed, the case owner has discharged their responsibilities.

Model #1: Assigned Case Lead

Harper College Distributes Case Management Duties across Team

Harper College

Harper Early Alert Team (HEAT) Case Lead Assignment and Work Process



Intake Expectations

- Conduct initial evaluation and threat assessment
- Follow up with referrer to explain general processes and collect additional information
- Lead information gathering efforts regarding student of concern

Case Assignment Criteria

- Pre-existing relationship with student
- Relevant expertise and office services
- Close relationships with referring department or office
- Time and capacity to follow up

Case Update Expectations

- Alert team in case of case escalation or emergency
- Request support from other team members, if necessary
- Recommend next steps and additional referrals to on- or off-campus services
- Propose whether or not HEAT should close the case

Source: Advisory Board interviews and analysis.

One institution that has successfully implemented Model 1 is Harper College. Each week, the team receives about four or five new referrals. The chair handles most of the referrals, but at any given time, each team member has several cases for which they are responsible. Some cases require one or two weeks of monitoring and referrals, while others may require long periods of assistance.

At Harper College, team members on call receive referrals by phone or email and serve as the initial point of contact for new cases. Serving as the initial lead requires them to follow up with referrers to gather additional information and collect relevant details from other student service units. The initial case lead also makes a preliminary assessment to determine if an emergency meeting is necessary.

Once the preliminary information is collected and recorded in a database, the initial lead presents the case to the team at the regularly scheduled, bi-weekly meeting. At that point, the team may decide to reassign the case based on a number of factors. If the case is reassigned, the new lead then follows up with the student and serves as their main point of contact until the case is closed.

Interviewees report that this model allows them to be more effective in their work with students of concern because it spreads the responsibility for ongoing follow-up among a variety of practitioners. Other benefits of Model 1 also include the ability to handle more complex cases without adding a new position, the flexibility to customize the dedicated point of contact to a student's needs, and the potential to reduce staff burnout.

Preventing Burnout by Distributing Assignments

Assigned Case Owner Strategy Reduces Strain on Busy Staff

Model #1: Assigned Case Leads	
Pros	Cons
• No additional staff needed • Reduces burden on team Chair and spreads responsibility among team members • Students receive a single liaison to coordinate services • More tailored approach to a student's specific needs and personality	• Limited capacity among team members • Inconsistent recordkeeping among team members • Lack of training in case management work • Counseling staff may not be able to update the team due to confidentiality requirements

Shared Responsibility Benefits Students and Staff

"There is no burnout among staff who have other full-time responsibilities, and the assignment is based on who is going to best benefit the student. The case owners' communication through Maxient won't let students drop through the cracks. There is more accountability among team members now, and our expectations for team member performance are elevated."

Kellie Angelo Monteith
Western Carolina University

Source: Advisory Board interviews and analysis.

In contrast, Model 2 involves dedicated case management resources. Institutions who use this approach have one or more FTEs responsible for regular student follow-up, communication, and ongoing support. Individuals in case management roles typically have backgrounds in counseling, social work, or student development.

Model #2: Dedicated Case Managers

Hiring of Student Affairs Case Managers Is on the Rise

Job Description

Student Affairs Case Manager[1]

The Office of the Dean of Students is pleased to open the application process for a Student Affairs Case Manager. This is a full-time position reporting to the Dean of Students. The case manager supports student success and retention by coordinating services for students of concern and conducting outreach to the campus community.

Job Functions

- Manage caseload of students with behavioral, emotional, personal, and other issues
- Communicate with campus community regarding student success and available student services
- Maintain records on students of concern
- Assess case management and BIT work through data collection and reporting to the Dean of Students and Vice President for Student Affairs

Benefits of Dedicated Case Managers

1. Provides ongoing support for students of concern through regular check-ins and referrals
2. Helps connect students with resources on campus and in the community
3. Allows BIT chair to focus on team process and larger trends
4. Serves as referral escalation manager for the BIT
5. Maintains records on BIT cases, updates spreadsheet or database as needed

[1]Adapted from several case manager job descriptions at public and private institutions

Source: Advisory Board interviews and analysis.

While Forum research reveals a variety of different organizational structures for case managers, we strongly recommend placing the position within the Dean of Students office. This reporting structure allows the case manager to serve in more of an administrative capacity (rather than in a therapeutic role), maintaining open lines of communication with various campus stakeholders.

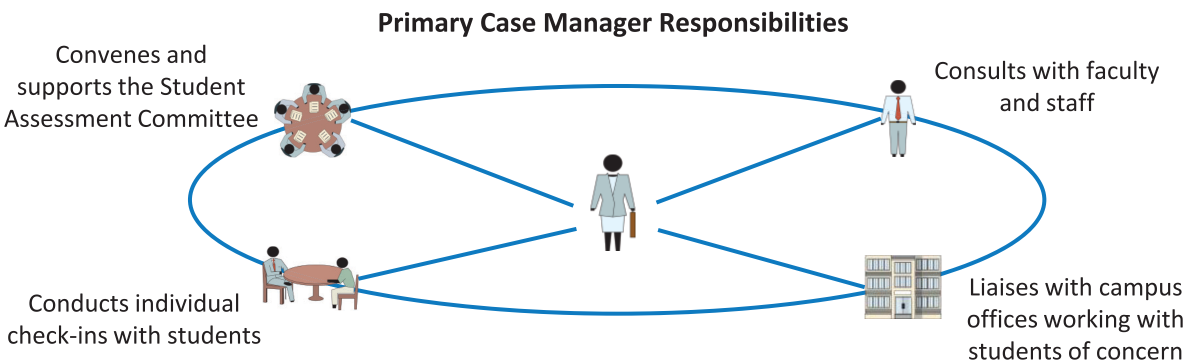
Case managers spend the majority of their time meeting with students, keeping records, and consulting with the campus community about students of concern. Other key duties include coordinating with other offices, assisting students with withdrawals and reentries, coordinating crisis response, and consulting with faculty and staff.

Case managers typically serve on BITs as either full members or conveners. The Forum, however, does not recommend having the case manager act as the BIT chair because it could potentially create a conflict of interest.

The University of Miami stands out as an excellent example of using case managers effectively. Currently, Miami employs three case managers: one in counseling, one in residence life, and one in the Office of the Dean of Students (ODOS). Interviewees report that these case managers serve as front-line support for the Division of Student Affairs. The graphic below focuses on the Dean of Students case manager.

A Gatekeeper and a Resource Coordinator

The University of Miami's Dean of Students Case Manager



Additional Support for Student Follow Up

"Each dean has at least two areas of responsibility to oversee. The work tended to become a bit much for the deans who already had dual responsibilities. The volume is never going to go down. There is a lot of follow-up and communication that needs to happen with these students, so we created the case manager position here in my office."

Ricardo Hall
The University of Miami

Source: Advisory Board interviews and analysis.

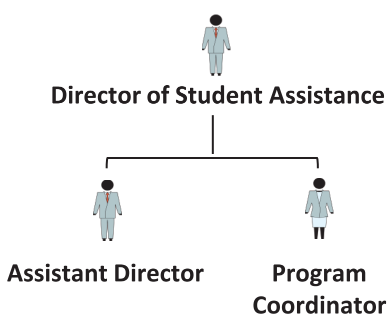
The Dean of Student's case manager oversees the initial evaluation of referrals, conducts outreach to the campus community, meets with students, and consults with faculty and staff. The person also convenes the Student Assessment Committee and handles the group's recordkeeping.

The Forum's work also uncovered a possible future trend in student case management. A handful of institutions have established dedicated student assistance offices to handle a variety of tasks from helping with withdrawals to providing student crisis response. Depending on how the office is structured, it may contain case managers as well as administrative staff to help with scheduling, recordkeeping, and low-level follow-up.

A Future Trend?

Dedicated Student Assistance Offices

IOWA STATE UNIVERSITY



Core Responsibilities of the Office of Student Assistance and Outreach Services

- Refer students to campus services
- Answer student questions about university policies
- Provide student crisis response and case management
- Maintain records for student interventions
- Conduct threat assessment on relevant referred cases
- Serve as a "single point of contact" for issues of sexual misconduct, bullying, and harassment
- Assist with academic and University-initiated withdrawals
- Report data and trends to the Student Assistance Follow-Up and Evaluation Team

Source: Iowa State University Office of Student Assistance and Outreach Services web page, at http://www.dso.iastate.edu/sa/; Advisory Board interviews and analysis.

For example, Iowa State University's Office of Student Assistance and Outreach Services contains three full-time staff members who are responsible for a range of duties including referring students to campus services, providing crisis response, and maintaining records for student interventions.

Forum interviewees highlighted other examples of dedicated student assistance offices such as those at Syracuse University and the New School. While the mission, staffing, and resource allocation varies across institutions, all of these offices play a role in managing follow-up and support for students of concern. Research contacts note that additional duties for these offices range widely and may involve threat assessment, counseling, and referrals to campus resources.

A Variety of Missions and Resources

Other Institutions with Dedicated Assistance Offices

Office of Student Assistance

"The staff works to address the needs of students who struggle in such areas as psychological health, physical health, victimization, relationship issues, and social adjustment through a variety of interventions, referrals, and follow up services."

Student Support and Crisis Management

"The response team will perform one or more of the following: visit the scene of the crisis, mobilize on-campus resources, mobilize off-campus resources, contact the family of the affected student(s)…"

Office of Student Support and Case Management

"Working in cooperation with the Dean of Students Office, we serve as the primary resource for managing referrals and student issues related to crisis intervention."

Students of Concern Assistance Program

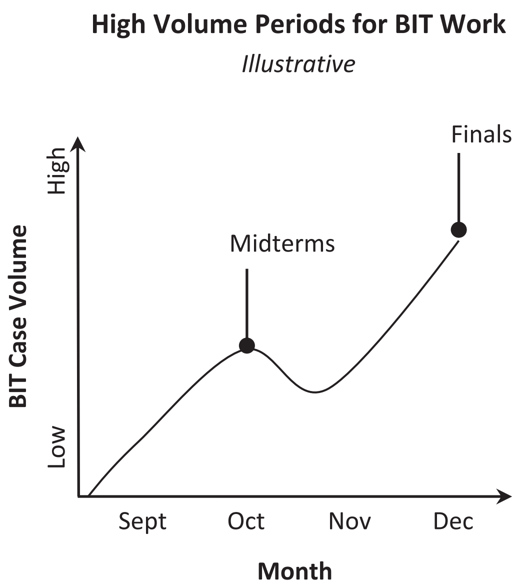
"The goal is to help the student focus on academic success, avert more serious difficulties, and ensure the safety of both the student and USF community."

Source: Syracuse University Office of Student Assistance web page, at www.syr.edu/currentstudents/studentassistance.html; The New School Student Services Crisis Response Team web page, at http://www.newschool.edu/safety/subpage.aspx?id=36446; George Mason University Office of Student Support web page, at http://osscm.gmu.edu/; University of South Florida Student Assistance Team web page, at http://www.studentsofconcern.usf.edu/; Advisory board interviews and analysis.

Although some schools are investing in dedicated resources to help manage the ongoing follow-up for students of concern, many teams still struggle with the "tyranny of the immediate," going from the processing and managing of one case to the next.

Peaks and Valleys Across the Year

Key Student Stress Moments Escalate BIT Workload



A Difficult Balance To Strike

"The amount of cases and follow-up is the hardest part of BIT work. It is a challenge to try and keep up with the number of students. Especially at the end of the term, you focus on the crisis and not the folks who fall off the radar."

BIT Chair
Public University

Source: Advisory Board interviews and analysis.

The pace of BIT work frequently escalates at high-stress moments such as midterms and the end of the semester. As such, a case that seemed urgent last week might easily be superseded by a more immediate crisis, which can lead to some students falling off the radar.

Practice #15: Ongoing Case Review and Tracking

Forum research surfaced several tactics designed to increase the visibility of open or ongoing cases. One strategy to enhance transparency is a semester pull-up session where the team reviews all cases handled across the term. The group goes through the cases chronologically to ensure that nothing has fallen off the radar.

Making It Harder to Fall Through the Cracks

Review Sessions Help Teams Pull-Up and Discuss Open Cases

Semester in Review Sessions

Key Details
Team holds a dedicated meeting at the end of each semester to review all cases handled during the term

Special attention is paid to cases marked as open or monitor, as these students will be carried over to the next term

Team members strategize next steps and outreach efforts for carryover cases

Benefits for Students and BIT

Students

- Facilitates proactive outreach and connection to resources
- Fosters a safe and caring environment on campus

BIT

- Ensures students are not overlooked, especially after peak capacity periods
- Allows team to review their performance and key lessons learned

Source: Advisory Board interviews and analysis.

During the review, special attention is paid to cases still marked as open or monitor, which will be carried over to the next semester. For each open case, team members focus on next steps, discussing proactive outreach efforts and potential support resources. Overall, these sessions act as a forcing mechanism for the team, helping them to step back, review their performance, and ensure that cases haven't fallen through the cracks.

Currently, many BITs struggle to prioritize cases in the face of an ever-increasing workload. A student who goes quiet after a period of crisis can fall off the team's agenda and therefore the group may assume the intervention was successful. Experts suggest, however, that these quiet cases may in fact be places where the team should pay extra attention.

The Crisis in the Crowd

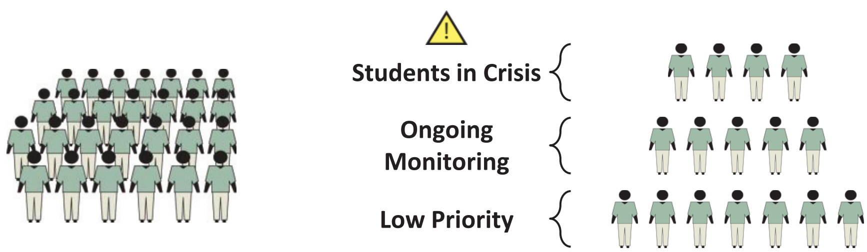
Keeping High-Priority Students at the Forefront of BIT Work

Current State

Students not distinguished by need

Ideal State

Students prioritized by case severity



Seeing Through the Silence

"One of the lessons we are learning is that we need to track those frequent fliers who go quiet. In fact, this is probably where we need to be focusing [more of] our attention."

Brian Van Brunt
Western Kentucky University

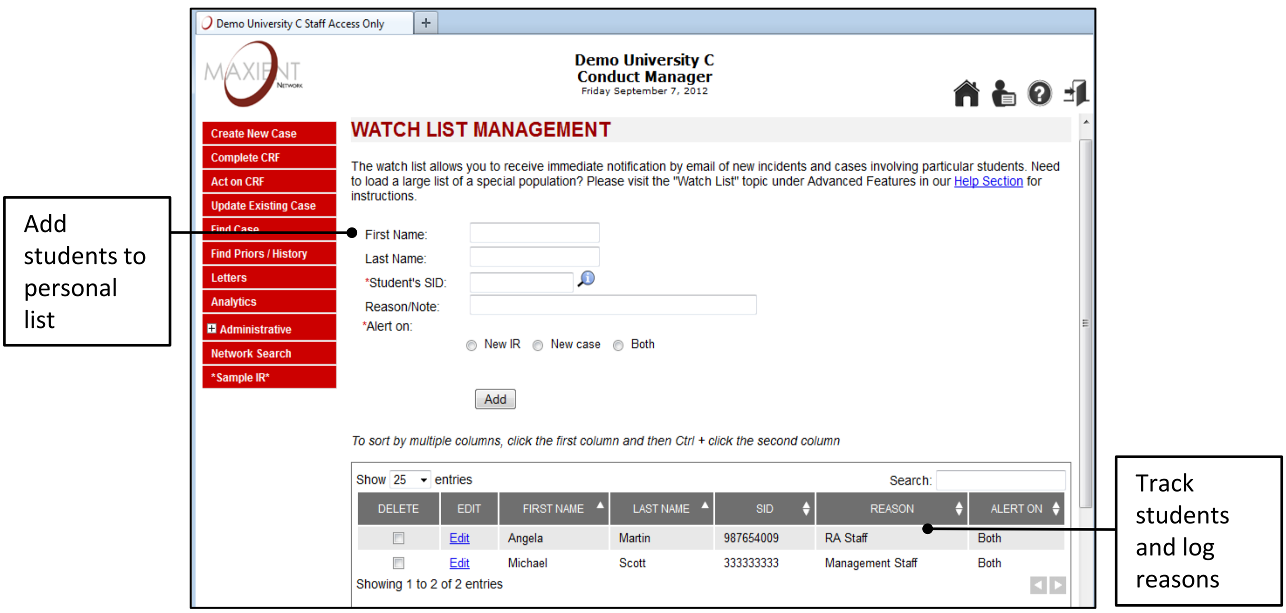
Source: Advisory Board interviews and analysis.

To increase the visibility of high-priority students, some BITs have implemented resource intensive solutions. For example, vendor databases have built in mechanisms designed to keep certain students top of mind.

For example, Maxient users can create private, personal watch lists of students who may require extensive support and follow-up. After a user adds a student to their watch list, they receive notifications about any developments regarding that student.

Maxient Allows for Personalized Watch Lists

Helping Team Members Track High-Priority and Ongoing Cases[1]



[1] Maxient screenshot is proprietary material. Do not duplicate or share without express, written permission from vendor.

Source: Maxient, at http://www.maxient.com/; Advisory Board interviews and analysis.

When an alert is generated, the user can go into the system and see the information if they have the appropriate user rights. If the person does not have the appropriate user rights to view the case, they can see that something was created in the system as well as who to contact if they need additional information or want to consult.

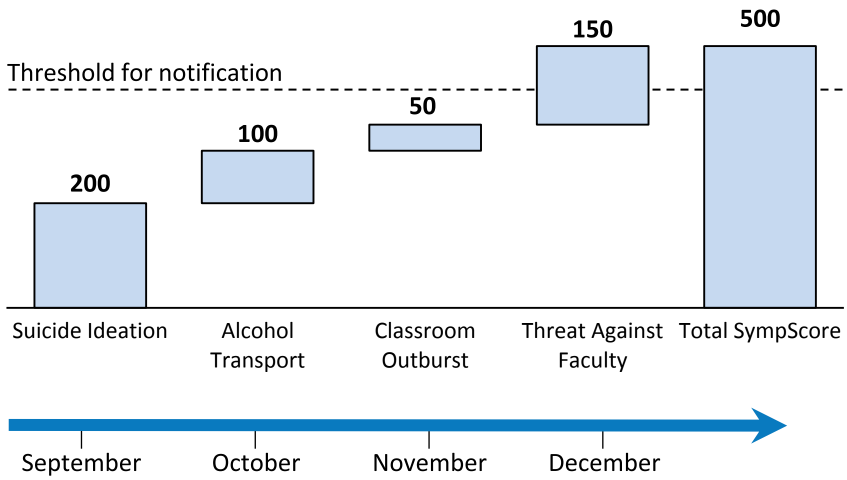
Symplicity's CARE Module includes functionality that alerts teams about escalating cases. When the system is set up on campus, administrators assign points to various categories of behavior. For example, the team might decide that suicide ideation carries a value of 150 points in the system whereas classroom outbursts are worth 50 points. These points are then aggregated and produce an overall SympScore for each student.

Intervening Before the Breaking Point

Symplicity's SympScore Alerts Teams about Escalating Cases

John Q. Student's Fall Semester

Concerning Behaviors Culminate in Alarming SympScore

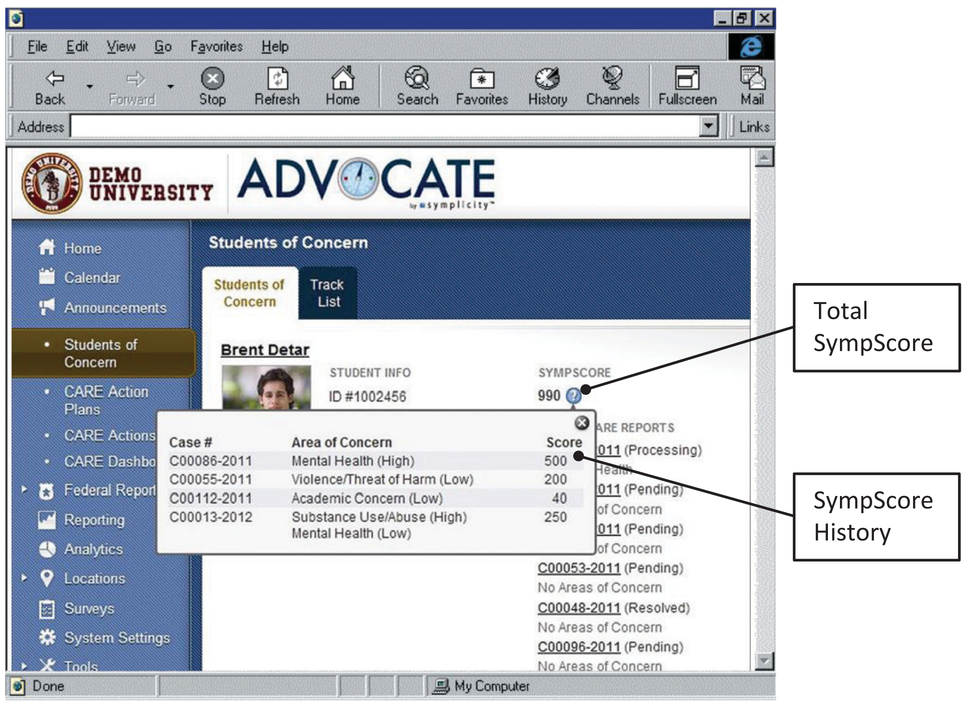


Source: Advisory Board interviews and analysis.

A student's cumulative SympScore is plotted against a threshold set by administrators (such as 125 points). Students who exceed the threshold are automatically placed on a priority list for quick, frequent review. This list can help BITs spot students who may be escalating towards a crisis or identify people with multiple concerns who are popping up in various offices across campus.

Symplicity Advocate's SympScore

System Feature Ensures Maximum Visibility for High-Priority Cases[1]



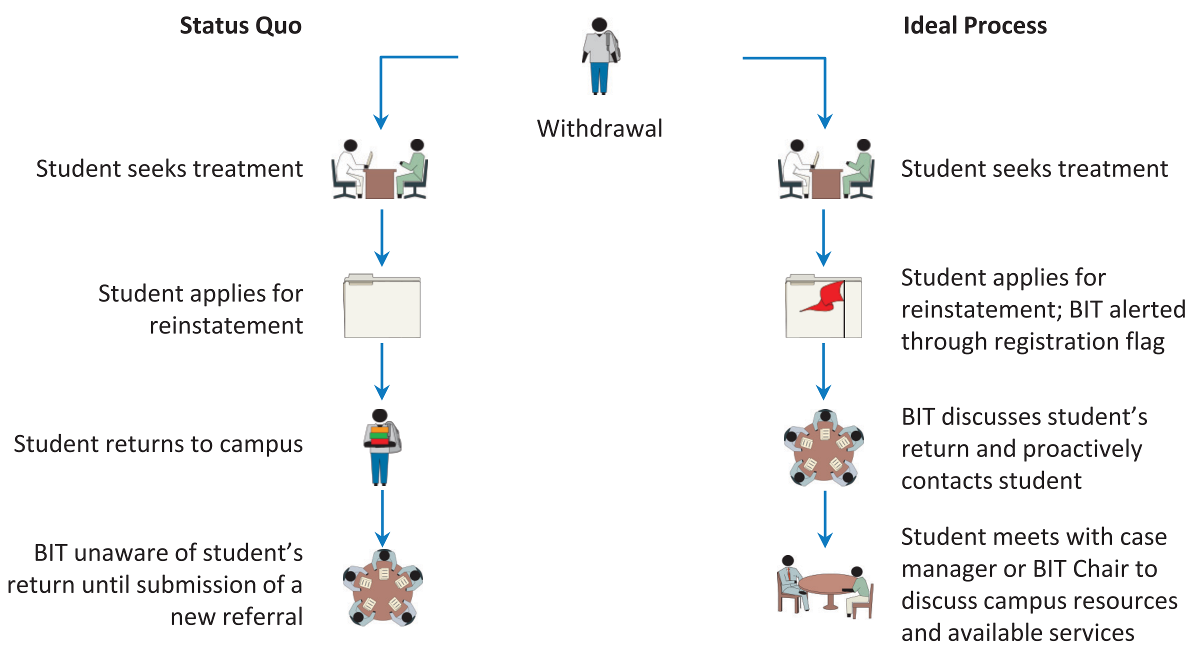
1 Symplicity Advocate screenshot is proprietary material. Do not duplicate or share without express, written permission from vendor.

Source: Symplicity Corp., at http://www.symplicity.com/; Advisory Board interviews and analysis.

While semester pull-ups and watch lists improve communication around ongoing cases, BIT data gathering and tracking tends to end when a student goes on leave or withdraws. Typically, teams record the outcome and close the case in the recordkeeping system. As a result, many teams are unaware when a former student of concern returns to campus. This information gap means that teams often miss an opportunity to proactively connect with the student before their return.

Left in the Dark

Teams Typically Unaware of Returning Students



Source: Advisory Board interviews and analysis.

Forum interviewees suggest one way to address this information gap is to have a hold or flag placed on the student's file so that when they return from leave or are readmitted the BIT is automatically alerted.

One institution that stands out in proactively working with and supporting returning students is the University of South Florida. Their Students of Concern Assistance Team helps students voluntarily withdraw from classes for medical or psychological reasons. As part of that program, students agree to a return process in which they meet with a case manager and submit treatment forms from their community provider.

Facilitating a Smoother Return

Proactive Outreach and Support Fosters Student Success

USF
UNIVERSITY OF SOUTH FLORIDA

Individual Meetings with Returning Students

Format: One-on-one with student affairs case manager in-person or via phone or Skype

Documentation: Proof of treatment; opinion from student's community provider indicating readiness to return

Staff Time: Approximately one to five hours for withdrawal and return assistance depending on case complexity

Session Themes: Lessons learned from time away, resources needed for success, ability to function safely and autonomously

Encouraging Positive Change and Reflection

"Anecdotally, we know that some of the students who have come back have a great change in positive academic improvement, in GPA, and self-esteem. We have a form for students that asks them about what they have learned with their time away, what they think they need, whether they are ready to come back. The student thinks they are ready to return to campus, but our form and our conversations help them think through this process a little bit and identify what they might need."

Jennifer "JJ" Larson
The University of South Florida

Source: Advisory Board interviews and analysis.

During the meeting with the case manager, the student discusses their time away from campus, their readiness to return, and their ability to function autonomously and independently. The meeting focuses on identifying resources for the student's success.

Students who participate in the process described above are not reapplying to the institution. They are simply returning and have a flag placed on their registration until they complete the agreed upon process. At USF, students remain "active students" for three semesters after a leave.

Section VI

Linking BIT Work to Student Success

Practice #16: BIT Operations KPIs

Practice #17: Student Success Outcomes

Practice #18: Forecasting Future Student Needs

Profiled Institutions

- University of Utah
- University of Alberta
- University of Alaska Anchorage
- Ohio University
- University of Florida
- Iowa State University
- University of Mississippi

Diagnostic Questions

Linking BIT Work to Student Success

The following questions are designed to guide members in evaluating their current BIT assessment initiatives. Based on the number of affirmative responses, each member will fall into one of the categories on the opposite page. These categories can be used to identify tactics particularly well suited to member circumstances. Note: questions should be answered from the perspective of the BIT Chair.

Questions	Yes	No
1. Does your BIT track data on basic metrics, such as the number of case, types of concerns, and referral sources?	❑	❑
2. Do you track data on advanced metrics, such as number of reports for key student subpopulations (e.g., athletes, international students, Greek students), the number of students of concern by academic major, and the number of mandated assessments?	❑	❑
3. Is caseload data aggregated into a summary document for inclusion in annual unit-level or divisional assessment reports?	❑	❑
4. Would your team consider uploading your BIT assessment results to your website for public viewing?	❑	❑
5. Does your BIT systematically share key data points with senior administrators across the year?	❑	❑
6. Do you track the retention and graduation rates for students who have been referred to the BIT?	❑	❑
7. Would your team be comfortable in soliciting student feedback about their experiences and outcomes from the intervention process?	❑	❑
8. Does the team regularly use assessment data to identify current resource gaps, pinpoint emerging populations of high-need students, and model future service adjustments?	❑	❑

Understanding Your Current State

Number of Yes Responses

0-2 No Assessment: The team does not track data on its workload and performance, nor does it review these quantitative measures with senior administrators and other institutional stakeholders.

> The Forum urges teams in this category to track basic *BIT Operations KPIs*, such as the number of referrals per year and referrer demographics. These KPIs allow for a deeper understanding of team performance and workload.

3-4 Basic Assessment: : The team tracks some data on its performance but lacks a nuanced understanding of case demographics, outcomes, and processes.

> The Forum suggests that teams in this category compile advanced *BIT Operations KPIs*, such as the number of referrals by major and the number of mandated assessments, to yield a three-dimensional perspective on the team's work.

5-6 Moderate Assessment: The team tracks essential data points and communicates them to senior stakeholders. However, team members struggle to connect this data to the institution's educational mission.

> The Forum recommends that teams in this category explore *Student Success Outcomes*, focusing on metrics that demonstrate the team's contribution to institutional priority, such as retention, wellness, and academic success.

7-8 Advanced Assessment: The team tracks and reports out all key data points to senior administrators, including the impact of the team's work on student success.

> The Forum advises teams in this category to integrate BIT data into strategic planning by *Forecasting Future Student Needs*.

Although institutions are increasingly investing in recordkeeping and case management systems, few BITs currently have robust assessment initiatives. While many groups can point to anecdotal evidence of success, experts note that systematic outcomes assessment is a very challenging endeavor in this terrain.

A Troubling and Surprising Gap

The Status Quo Regarding BIT Assessment Initiatives

In Theory We Are Successful

"We have not focused much attention on documenting our impact. We like in theory what we are accomplishing through this group. It helps us focus on concerning students and brings them to our attention…but we have not done much with assessment or results reporting."

Student Affairs Executive
Private University

Not Many Teams Looking To Assess

"Out of more than 700 institutions, only 2 schools have asked us how to do this type of BIT [outcomes] assessment."

"If you can't measure your performance, it is hard to show your BIT is being effective…but there are some challenges in getting this data."

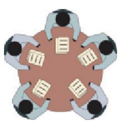
Brett Sokolow
NCHERM

Source: Advisory Board interviews and analysis.

Forum research illustrates that few BITs currently dedicate time to data collection and results communication. When pressed to explain this oversight, some interviewees suggest that senior administrators are not interested in receiving granular data while others highlight growing caseloads, noting that they are too overwhelmed to aggregate and share key metrics.

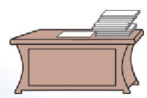
"Results Data is Nice to Have But…"

Common Reasons Why Teams Lack Assessment Initiatives



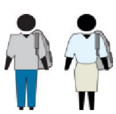
Not Enough Time

"We are overwhelmed with work as it is. We don't have any time to review and aggregate data."



Lack of Senior Interest

"Senior leaders just want to know we exist and are taking care of the problem. They aren't interested in seeing granular data."



Not a Key Priority

"Assessment data would be great but it isn't essential for this work. For us the focus is the student and we see the difference the group is making"

Negative Campus Image

"We have some data but I wouldn't want to share it with the community. People would think we have many troubled students or are an unsafe place."

Source: Advisory Board interviews and analysis.

As a result, BIT work usually remains invisible on campus with many institutional leaders unaware of the amount of time, effort, and resources invested in supporting students of concern.

Practice #16: BIT Operations KPIs

At a minimum, BITs should report annually on key performance indicators (KPIs), sharing this aggregated information with senior administrators. Basic data points to cover include the number of total referrals, the number of cases, and the types of concerns. The Forum recommends that teams compile a brief overview document with these KPIs as well some additional information about the group's mission and process to share with campus stakeholders.

Communicating Results Beyond the Team

Basic and Advanced KPIs

	Basic KPIs	Advanced KPIs
Key Metrics	• # of total referrals • # of cases • # of individual students • # of concerns and types • # of reports based on academic year/standing • # of reports based on gender • Referrer demographics (role, type, location)	• # of referrals for residential students • # of reports for sub-populations (such as athletes) • # of students by major and/or academic college • # of mandated assessments • Top referral sources • # of referrals from students • # of referrals by channel (such as phone or email)
Reporting Frequency	Annual	Annual
Target Audience	• Senior Divisional Leaders • University Administrators • Board of Trustees	• Senior Divisional Leaders • University Administrators • Board of Trustees • Faculty and Staff (excerpts) • Campus Community (excerpts)

Source: Advisory Board interviews and analysis.

For institutions with a robust assessment infrastructure, there are a variety of additional metrics that teams may be interested in tracking given their mission, resources, and campus culture. These advanced KPIs include the number of referrals for specific affinity groups, the top referral channels, and the number of mandated assessments.

Forum research surfaced two noteworthy institutions, the University of Utah and the University of Alberta, that create annual summaries of BIT work. Interviewees suggest that the goal in producing these results communications is to help raise stakeholder awareness regarding students of concern and support services on campus.

Presenting a Snapshot of Results Data

The BIT Annual Summary

THE UNIVERSITY OF UTAH

Key Components

- Team mission and principles
- Current BIT members
- Data on reports based on gender, type of concern, student's country of origin, and student's academic standing

Distribution

- Team summary incorporated into the Dean of Students Office Annual Report
- Annual report shared with Vice President for Student Affairs, Provost, and senior leaders

UNIVERSITY OF ALBERTA

Key Components

- Helping Individuals at Risk (HIAR) Policy
- Education and awareness outreach efforts
- Data on reports per individual, types of at-risk behavior, peak reporting months, referrer location, and services provided

Distribution

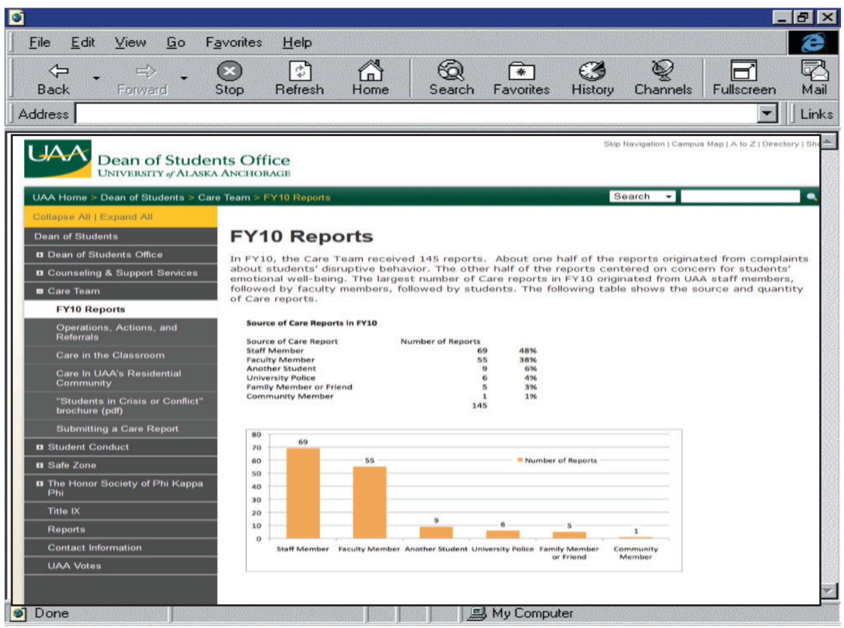
- Results reporting mandated as part of HIAR policy and charter
- Aggregated data shared annually with Board of Governors and the General Faculty Council

Source: The University of Utah, "Dean of Students Office Annual Report 2010-2011," at http://studentaffairs.utah.edu/assessment/documents/annual-reports/annual-reports-2010-11/DOSO-annual-report-2010-11.pdf; the University of Alberta, "HIAR Annual Report" (2010-11); Advisory Board interviews and analysis.

The Care Team at the University of Alaska Anchorage takes results communication one step further. The group posts data from its annual report on the team's website, providing visitors with information about the source and quantity of reports as well as the various types of concerns.

Reaching a Broader Audience

University of Alaska Anchorage's Care Team Puts Results Data Online



For more information, visit
http://www.uaa.alaska.edu/deanofstudents/CareTeam/fy10-reports.cfm

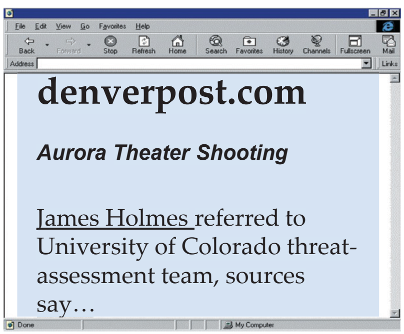
Source: The University Alaska Anchorage, "Care Team FY10 Report," at http://www.uaa.alaska.edu/deanofstudents/CareTeam/fy10-reports.cfm; Advisory Board interviews and analysis.

While this approach is too public for many institutions, the Forum believes some teams may choose to adopt this approach in the future in order to raise community awareness and bring additional transparency to the group's work.

Sharing annual summaries and KPIs helps cultivate top-level support and build stakeholder confidence. The Forum recommends that teams use annual summaries to educate senior administrators about the group's process and procedures. This strategy not only keeps institutional leaders informed but also ensures they have some basic familiarity with the BIT should a major crisis or high-profile incident occur.

Building Awareness Among Senior Leaders

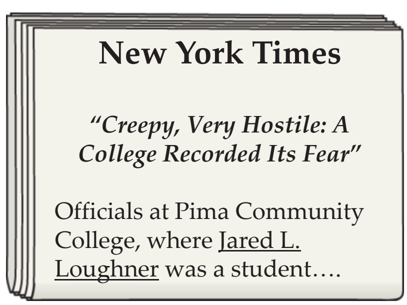
Results Communications Improve Team Visibility



denverpost.com

Aurora Theater Shooting

James Holmes referred to University of Colorado threat-assessment team, sources say…



New York Times

"Creepy, Very Hostile: A College Recorded Its Fear"

Officials at Pima Community College, where Jared L. Loughner was a student….

Cultivating Top Level Support

"Who will stand behind the BIT when the crisis happens? Will the President back the work of the BIT? Teams need to find a way to inform senior leaders about the group, their processes, and their decisions…so the President and other administrators have confidence in their actions."

BIT Chair
Public University

Source: Marc Lacey and Serge F. Kovaleski, "'Creepy,' 'Very Hostile': A College Recorded Its Fears," *New York Times* (January 12, 2011), at http://www.nytimes.com/2011/01/13/us/13college.html?_r=1; Jeremy P. Meyer and Allison Sherry, "James Holmes referred to University of Colorado threat-assessment team, sources say," *DenverPost.com* (August 1, 2012), at http://www.denverpost.com/breakingnews/ci_21212797/alleged-theater-gunman-was-referred-threat-assessment-team; Advisory Board interviews and analysis.

Practice #17: Student Success Outcomes

Given the intense focus on student success, the Forum argues that BITs must find ways to link their work to tangible outcomes such as retention and graduation. Interviewees highlight how innovative teams, such as the ones at Ohio University and the University of Florida, are already beginning to assess their impact on student success.

Connecting BIT Work to Student Success

Teams Assess Retention and Graduation Data

Tracking Retention By Semester

OHIO UNIVERSITY

- BIT Chair provides IR Office with list of ID numbers to gather retention data on students who came before the team during the semester
- Results data is shared with team as well as senior divisional leaders

Gathering Annual Graduation Data

UF UNIVERSITY of FLORIDA

- BIT Chair generates a list of graduated students who had interactions with the team and/or the Dean of Students case managers
- Graduation data is shared with case managers as well as BIT members

Demonstrating Our Impact

"Pulling the graduation list and seeing the names on it was incredibly rewarding for the case managers and the [Behavioral Consultation] team. There were people on the list who had serious issues as well as students who had consistent interactions with the case managers. Having this data not only reinforced staff morale but it shows our impact."

Jen Day Shaw
University of Florida

Source: Advisory Board interviews and analysis.

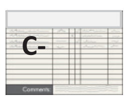
Early results from these initiatives suggests that student outcomes data not only boosts staff morale but can also be used to communicate the impact of the BIT's work outside the division.

While retention and graduation are the easiest indicators to measure, Forum research shows that there are other, less concrete indicators that can be explored around student success. For example, some BITs have started tracking a student's pre- and post-intervention GPA in order to see whether there is a meaningful change.

Looking Beyond Retention and Graduation

Additional Assessment Metrics

Student GPA



- Track a student's GPA pre- and post-BIT interventions

Potential Drawbacks

- Difficult to show a direct connection between BIT interventions and GPA

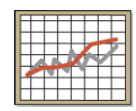
Leaves and Withdrawals

- Count number of students known to BIT taking a medical leave or withdraw

Potential Drawbacks

- Hard to explain how these numbers constitute success to leaders outside the team

Readmission



- Collect data on returning students such as average time away and current GPA

Potential Drawbacks

- Difficult for BIT to systematically track returning student outcomes due to communication gaps

Source: Advisory Board interviews and analysis.

Although there is skepticism about whether GPA can be directly connected to BIT interventions, some teams have added this indicator to the regular metrics they track for student cases in order to see if they can draw any broad conclusions over time.

Interviewees also report it can be difficult to explain how withdrawals and medical leaves constitute success to senior administrations focused on retention and graduation numbers. A few schools, however, try to shed light on data regarding leaves, withdrawals, and readmissions to foster a more nuanced discussion. Potential findings might include longitudinal trends around the average time away on leave, the percentage of students returning, and the final outcomes for returning students of concern.

In addition to quantitative metrics, a handful of institutions also gather qualitative data, asking students to assess their experiences and interactions with the group. At Iowa State, the Office of Student Assistance and Outreach surveys students who have interacted with the staff in order to get their feedback. The office's survey asks students to reflect the staff's willingness to listen to their concern, the student's prior knowledge of campus resources, and the usefulness of referrals.

Documenting Student Attitudes and Experiences

Teams Solicit Feedback about the Intervention Process

IOWA STATE UNIVERSITY

Student Assistance and Outreach Services Survey

1. Student is referred to the Student Assistance and Outreach Services office
2. After a student's case file is closed, the office's homegrown database automatically generates a feedback email. Staff can mark sensitive cases so they don't receive a survey
3. Student receives a personalized email inviting them to reflect on their recent experience with the Student Assistance office
4. Survey link is embedded in the email and student responses are aggregated for data analysis
5. Staff review results to gather feedback and improve the assistance process

Sample Questions

- Did you feel that the office staff understood your concerns?
- Did you feel that the office staff listened to your goals and concerns?
- Do you feel supported by the office?
- When you came to the office, did you know the resources you needed to address your concerns?
- Was the office helpful in connecting you to those resources?

Source: Advisory Board interviews and analysis.

Interviewees highlight how the instrument is designed to shed light on what constitutes success for the students referred to the office and/or the BIT.

Although the concept resonated broadly with interviewees, the Forum's work did not currently surface any examples of teams systematically assessing student learning outcomes and BIT interventions. The Forum believes there is an opportunity to use rubrics or reflection exercises to assess certain outcomes from the BIT process such as the student's perception of their self-coping skills and/or knowledge of campus resources.

Student Learning Outcomes of General Interest…

…But Few Teams Currently Focusing Resources Here

Learning Outcomes Rubric

(Illustrative)

BIT Intervention Learning Outcomes *"As a result of this process…"*	Student Self-Assessment Rank from 1 to 5 1= Strongly Disagree, 5-=Strongly Agree
My knowledge of campus resources and services has increased	
I am more confident in my ability to make choices that promote my well-being	
I am more aware of the campus as a safe and caring environment	
I am aware of how my behavior and choices impacts the community	
I am able to effectively cope with various situations and people	
I feel more connected to the campus community	

Source: Advisory Board interviews and analysis.

Practice #18: Forecasting Future Student Needs

In thinking broadly about student success, research contacts assert that BIT data can be very useful in strategic planning initiatives. The Forum observed three main ways that institutions can leverage BIT data to help with resource allocation and service planning.

Using BIT Data to Inform Strategic Planning

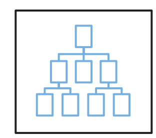
Team Metrics Help Identify Student Trends and Project Future Needs

Identify Current Resource Gaps

Helps locate current areas where additional resources are needed as well as service barriers

Pinpoint Emerging Student Populations

Highlights growing student segments where additional programming and outreach may be needed



Model Future Service Adjustments

Pinpoints areas, units, and services for expansion depending on student population needs

Source: Advisory Board interviews and analysis.

First, the data can help institutions rightsize resource allocations, highlighting alignment problems or emerging needs. For example, the University of Utah used BIT data to successfully make the case for a new position in the Student Affairs division.

Leveraging BIT Results in Strategic Planning

Divisional Leaders Use Data in Resource Decisions

Resource and Planning Questions

- How effective is the current resource allocation?
- Where should we increase staff or expand services?
- What areas are experiencing increased utilization?
- Does student demand match resource investment in key areas such as counseling and disability services?
- Are there current service barriers?

Making The Case For Additional Staff

THE UNIVERSITY OF UTAH

- BIT collected data on number of cases and complexity as part of record-keeping process
- Team incorporated case data into a resource request for a new dedicated FTE (BIT Specialist)
- Vice President for Student Affairs approved the resource request and funded the new position
- Staff member appointed to BIT Specialist role in December 2010, duties include supervising team and working with concerning students

Source: The University of Utah, "Dean of Students Annual Report 2009-2010," at http://studentaffairs.utah.edu/assessment/documents/annual-reports/annual-reports-2009-10/DOS-annual-report-2009-10.pdf; Advisory Board interviews and analysis.

In making the resource ask, they used growing case volume and complexity along with the number of departments impacted to demonstrate the need for a new role. Added in 2010, the BIT specialist serves as the team's chair as well as a case manager and recordkeeper.

Second, interviewees also noted how BIT data and student outcomes can be useful in pinpointing programming gaps or challenging cohorts. At the University of Mississippi, Student Intervention Team (SIT) data showed that out-of-state Greek males were growing as a proportion of students of concern.

Using BIT Work to Identify Student Trends

Highlighting Emerging Subpopulations at The University of Mississippi

THE UNIVERSITY OF MISSISSIPPI

BIT Data Analysis Questions

- What population segments stand out in BIT data analysis?
- Does the data highlight any programming or service gaps?
- How can the institution serve these emerging populations?

Student Intervention Team (SIT) periodically reviews case data in Symplicity Advocate, looking for broader trends and patterns among students of concern

Team analysis surfaced data that Greek males from out of state were an emerging population among students of concern

SIT Chair presented data analysis to the Retention Steering Committee, drawing attention to subpopulation and helping develop programming

Source: Advisory Board interviews and analysis.

The team chair subsequently took the data to the university's Retention Strategy Committee to discuss this trend with a broader group of faculty, staff, and administrators.

Forum research contacts suggested that having this data created an opportunity for the institution to address this emerging population through programming and proactive outreach.

Finally, the Forum believes that BIT data can be useful in thinking broadly about student trends. Having longitudinal metrics regarding BIT case trends, counseling referrals, and registered disabilities can help institutions think more concretely about staffing projections and service planning. This information can be especially important as institutions explore various resource trade-offs, modeling the downstream impact of expanding enrollment or recruiting different student demographics.

Estimating Impact of Enrollment Growth

BIT Data Helps Model Future Staffing Costs and Service Changes

	10,000 Students (Current Student Body)	13,000 Students (Growth Scenario 1)	15,000 Students (Growth Scenario 2)
BIT Cases	90	117	135
Hospitalizations	12	16	18
Case Managers[1]	½ FTE	¾ FTE	1 FTE
Student to Counselor Ratio	2,000 to 1 (5 Counselors)	2,100 to 1 (6.2 Counselors)	2,100 to 1 (7.1 Counselors)
Waitlist	2 weeks	2.5 Weeks	2.8 Weeks

Resource Needs
- Additional ¼ FTE for case management
- Extra 1.2 FTE for counseling center

Service Planning Issues
- Increased demand on counseling center as waitlist and staffing ratio increases
- Expanded caseload for BIT

[1] Refers to case managers in the Dean of Students Office.

Source: Advisory Board interviews and analysis.