



Using Caseloads to Improve Student Success

Navigate Public School Summer Series- Part 2
California State University- Los Angeles

California State University- Los Angeles



Quick Stats

- ~23k undergraduate students
- ~70% of undergraduate students are Latinx

Navigate Journey

- May 2017: Went live with Strategic Care and Intelligence



Meet Your Presenters



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Our Motivation

What Led to The Need for A Caseload Model



GI2025

- System-wide strategic plan
- Need to enhance advising to reach retention and graduation goals and address equity gaps



Attrition

- Losing 20% of first-time freshmen
- Losing 10% of second year students



Student Needs

- Meaningful, personal relationships with proactive advisors
- Majority of student population Latinx, first generation, or both
- Need systemic, not programmatic solutions
- Example: Educational Opportunity Program can't nearly serve all students who qualify



Lack of Structure

- Students seeing different advisors at different times, or no advisor at all
- Who is responsible for tracking student success?
- Unused campaign calendar



- Need mechanism for advisors to build improved relationships and be responsible for specific interactions to meet students at milestones in their academic career
- Create caseloads for years one and two with average ratio of 135 to 1 to allow for developmental advising

Implementation Phases

A Multi-Step Approach to Change Across Varied Centers



Communication

- Different centers had different models
- Needed strong rationale
- Emphasized caseload size and two year limit
- Addressed concerns



Caseload Creation

- Directors divided students
- Still fluid as some centers adjust strategy



Establishing Meeting Cadence

- Advisors needed clear direction
- Resurrected campaign calendar
- Involved stakeholders in calendar adjustments to instill ownership



Training

- Created workshops on holistic, asset-based advising
- Addressed disparities in Navigate knowledge
- Training is ongoing



Assessment

- Report to directors every 3 weeks
- % of caseloads advisors have met with at least once per term
- Provide suggested adoption percentages



Next: Measuring Relationships

- Considering surveys and student interviews
- Students in third year will have helpful insights

Change Management



Lessons Learned

Embrace the Consulting Role

- Despite lack of formal authority, we provide suggestions, data, and nudges
- We track and report on metrics to show stakeholders that we know what is and isn't happening

Facilitate Connections

- Use monthly caseload implementation meetings to discuss progress, share best practices, and overcome resistance
- Connect early adopters to those more hesitant
- Caseloads to be major theme at advising forums across next year, highlighting what centers are doing well and can teach others

Accept Different Rates of Progress

- After initial phases, centers progressed at different rates and phases become staggered
- Example: some colleges have 100% of advisors meeting with students at least once per term, others have 30%

Make Goals Public

- Shared information on caseload model in a Chancellor's video, annual GI2025 video, orientation materials, and cabinet level meetings
- Made it a public promise to the students, institution, system and community
- Promises created an expectation for the centers

Thank you for your participation today!

Please take a moment to answer the brief poll question on your screen.

We appreciate your feedback and hope to see you at future sessions.

Save the Date: November 3-5

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► **Innovative ideas from special guests**

► **Networking opportunities**

Join the Conversation in the new & improved EAB Community



The EAB Community is an online networking space for Navigate Leadership Team members. Log in to share best practices, learn from others, and tap into the collective knowledge of the Student Success Collaborative!

Access at **networking.eab.com** and reach out to your Strategic Leader with any questions.

What you can expect in the Community:



User-friendly interface where you can get quick answers to Navigate platform questions



Option to access via Mobile app



Easy to search directory of Navigate leaders



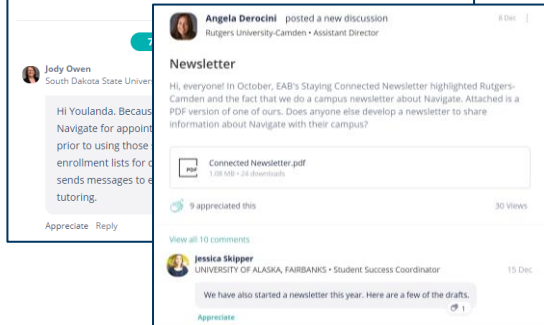
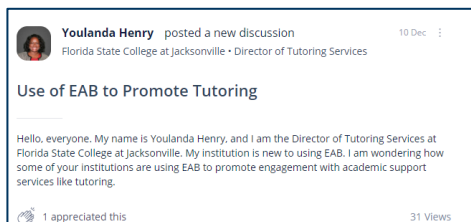
Direct messaging capabilities to network 1:1 or with up to 50 people



Ability to upload and view documents and resources



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