



EAB

Student Success Collaborative™
Navigate

CUNY – Queens College Implementation Strategy



EAB

K-12 | Community Colleges | Four-Year Colleges and Universities | Graduate and Adult Learning

We help schools support students from enrollment to graduation and beyond

④ **ROOTED IN RESEARCH**

7,500+ Peer-tested best practices

500+ Enrollment innovations tested annually

④ **ADVANTAGE OF SCALE**

1,500+ Institutions served

3.7 M⁺ Students supported by our SSMS

④ **WE DELIVER RESULTS**

95% Of our partners continue with us year after year, reflecting the goals we **achieve together**

- Find and enroll your right-fit students

- Support and graduate more students



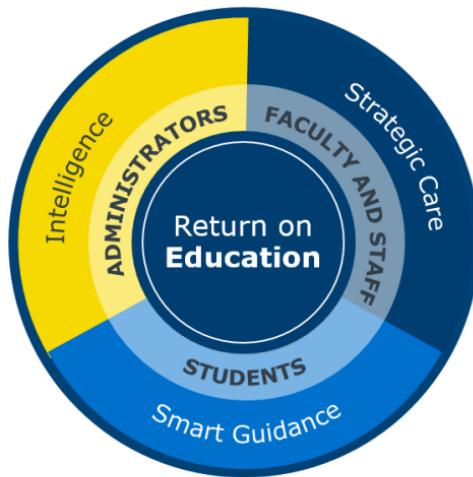
What is EAB's Student Success Management System?



The SSMS is an **enterprise-level technology** links administrators, advisors, deans, faculty, other staff and students in a coordinated care network designed to help schools **proactively manage student success** and deliver a **Return on Education**.

Unlock the power of data analytics, bringing real-time insights and **student success management intelligence** to administrators and leaders

Our Platform Promise

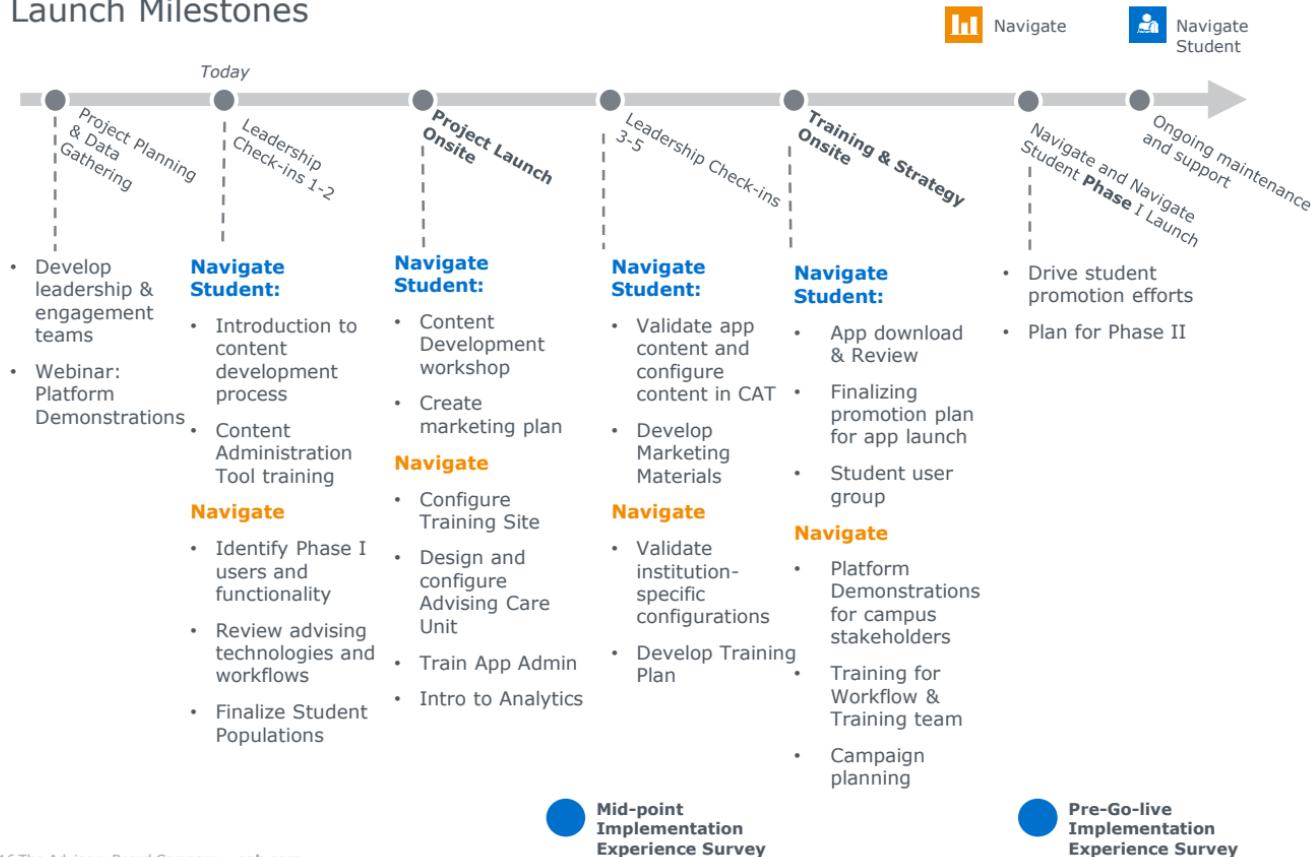


Create a connected and coordinated network of support for every student, enabling targeted intervention and proactive, **strategic care**

Provide **smart guidance** at the most pivotal moments along the college journey, simplifying and structuring pathways to completion.

Project Planning and Implementation Overview

Launch Milestones



Recommended Roll-Out Strategy

Understanding the Typical Implementation Process

Navigate Staff



Navigate Student



Intelligence



*Phases may not be concurrent

Phase I Focus: Ensure advising workflow is optimized and pilot student content is configured

- Pilot group and expanded advising unit utilize the desktop site
- Pilot students download app at orientation

Phase II Focus: Expand to additional users and begin utilizing analytics available through historic data collection.

- Advisors, tutors and students can schedule appointments with one another
- High utilization of key features by user groups
- Roll out and strategic use of Institution Reports and Predictive Model

Staff Phase 1 & 2 Approach

Phase I (Fall 2019)



P1 Units Moving Forward

- Advising



P1 Feature Recommendations

- Appointment Campaigns
- Student Profile
- Advising Summary Reports & Notes
- Messaging Students (Text & Email)
- Advanced Search and Lists
-
- *Progress Report Campaign Pilot*

Phase II (Spring 2019)



P2 Units Moving Forward

- Additional Care Units (i.e. Tutoring, Career Services)



P2 Feature Recommendations

- Appointment Campaigns
- Student Profile
- Advising Summary Reports & Notes
- Messaging Students (Text & Email)
- Advanced Search and Lists
- Student Initiated Appointment Scheduling
- Alerts & Case Management
- Progress Reports Campus-Wide

Smart Student Profile

Comprehensive View of Student Risk and Progress

The screenshot shows the EAB Smart Student Profile for Keshia Aaby. The main dashboard displays her course grade (0), repeated courses (0), withdrawn courses (0), missed success markers (4), cumulative GPA (2.79), credits attempted (2015), credits earned (21.00), and credit completion percentage (95%). On the left, there's a vertical sidebar with various icons. Below the dashboard, a detailed view of her success markers is shown, listing four courses: BIO2107N, BIO2108K, CHEM211K, and MATH1130. Each course includes its name, recommended grade, credit range, and outcome (e.g., Needs attention, 1 Attempt).

Course	Recommended Grade	Credit Range	Outcome
BIO2107N	B- (1 course)	15-30 credits	Needs attention 1 Attempt
BIO2108K and CHEM211K	C+ (2 courses)	30 and 45 credits	Needs attention 2 Attempts
CHEM211K	B (1 course)	15 and 12 credits	Needs attention 1 Attempt
MATH1130; MATH113 or Higher	B (1 course)	15 and 10 credits	Needs attention 2 Attempts



"Previously, we were advising based primarily on gut instinct. Now, we have all the data to give them an objective sense of where they are and what they can do to improve. The conversation has changed dramatically."

Navigate Advisor

Key Takeaways

- “Smart View” of academic factors to assess student’s progress
- Shared notes and reporting to centralize documentation on students
- Progress indicators and key academic metrics identify if student may be at risk
- Student-generated data from the mobile application will be visible in student profiles*



*Interactions with Intake Survey, Quick Polls, Major Explorer, Journey progress, and Favorited Resources will be shown

Advanced Search

Generate Lists of Students for Strategic Use or Day to Day Work

The screenshot shows the 'New Search' screen of an application. On the left is a vertical toolbar with icons for navigating between tabs, saving searches, and performing other actions. The main area is titled 'New Search' and contains several sections:

- Saved Searches**: A dropdown menu.
- Keywords (First Name, Last Name, E-mail, Student ID)?**: A text input field.
- Type?**: A dropdown menu set to 'Students'.
- Student Information**: Includes fields for First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List.
- Enrollment History**: Includes fields for Enrollment Terms.
- Area of Study**: Includes fields for College/School, Degree, Concentration, Major.
- Performance Data**: Includes fields for GPA, Hours, Credits.
- Term Data**: Includes fields for Classification, Section Tag, Term GPA.
- Course Data**: Includes fields for Course, Section, Status.
- Assigned To**: Includes fields for Advisor, Tutor, Coach.

Key Takeaways

- Layer multiple search filters for easy list generation and student identification
- Flexible filters provide each advisor with the ability to build lists to segment for at-risk students or prioritize students they work with on a daily basis
- Individual users can save dynamic and static lists of students to access later on
- Take immediate action from your Advanced Search by selecting applicable students. Message, initiate an Appointment Campaign, or take Notes on a group of students.

Advising Summary Reports & Notes

Track Details of Student Interactions to Facilitate Coordinated Care Network

APPOINTMENT REPORT FOR MARNIE AAVANG

Appointment Details

- Care Unit: Academic Services
- Location: Basscom Hall
- Service: Academic Advising
- Course: Start typing to search all courses
- Meeting Type: In-Person
- Date of visit: 10/09/2018

Attendees

- Support 436: Administration, Advisors, Student, Support User
- Marnie Aavang: Student, Study Hall Monitor

Summary Details For Marnie Aavang

Topics Discussed: [redacted]

Goals For Next Session: [redacted]

Student is prepared and cleared to register for the upcoming term. Yes No N/A

Student expressed an interest in changing major. Yes No N/A

Appointment Summary

B I

ADD A NOTE TO MARNIE AAVANG

Note (Required)

Note Subject

Marnie Aavang
Student, Study Hall Monitor

Relations

Note Reason: [redacted]

Note URL: [redacted]

Visibility

Support 436 Only
 Marnie Aavang
 Printed Student Report

Attach File No file selected.

Key Takeaways

- Advisors and Faculty may take notes on students after specific interactions, or to track need-to-know information about students
- Notes and Appointment Reports are saved on the Student Profile, and other staff may view them (based off of institution specific permissions)
- Notes facilitate knowledge-sharing across advisors and other Care Units.
- Administrators can view Note details in aggregate via Reporting built in to Navigate.

Appointment Campaigns

Target and Track At-Risk Students for Advising Appointments

Choose A Day

February 2019

Su	Mo	Tu	We	Th	Fr	Sa
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

Choose A Time

Wed, Feb 20

- 8:00am
- 8:45am
- 9:30am
- 10:15am
- 11:00am
- 11:45am

Comments

Is there anything specific you would like to discuss?

Comments...

You will be sent an email reminder to inrjyo23@equeugbl.syz.alp the morning of your appointment.

You will be sent a text reminder to 2025533553 the morning of your appointment. [\[Change\]](#)

[Review Appointment Details](#)

NAME STATISTICS

Fall Advising
ADVISING 08/18/2017 - 11/30/2017

Re-Enrollment Campaign
ADVISING [expired] 08/18/2017 - 09/01/2017

STATS

Appointments Made (100%) Reports Created (100%) Attendance Rate (100%)

Appointments Made (7%) Reports Created (33%) Attendance Rate (3%)

Key Takeaways

- Create outreach campaigns targeting specific student cohorts to schedule advising appointments with dedicated link
- Individual advisors can monitor and track the progress of their campaigns, view which students responded, and send follow-up reminders for those who haven't
- Flexible filters provide each advisor with the ability to build lists to segment for at-risk students or prioritize students they work with on a daily basis

Email and Text Messaging with Students

Tools for Centrally Tracked and Flexible Communication with Students

Conversation with David Johnson

via SMS
From: David Johnson
To: Mark Miller
I'm thinking of changing majors. What's my next step?

12/15/2014

via email
From: David Johnson
To: David Johnson
Let's talk at your degree planning check in that's coming up. Do you have any majors of interest?

12/15/2014

via email
From: David Johnson
To: Mark Miller
I'm thinking Business or Psychology.

12/15/2014

via SMS
From: David Johnson
To: Mark Miller

1/12/2014

Ulan Derrig

Overview Success Progress Reports / Notes Class Info Major Explorer More ▾

Galina, Ben Test - Hello Ulan Derrig! You have been... 05/26/2016 09:25 AM

White, Emily [Appointment Reminder] General Appointment @ 05/05/2016 8:00a- 05/05/2016 07:00 AM

Person, Unknown [Appointment Notification] General Advising @ May 04 2016 11:00a- 05/04/2016 09:24 PM

White, Emily [Appointment Notification] General Appointment @ May 05 2016 8:00a- 05/04/2016 09:14 PM

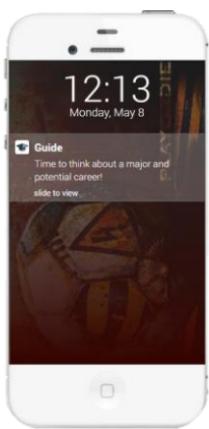
White, Emily [Appointment Notification] General Advising @ Apr 28 2016 4:30p- 04/28/2016 11:16 AM

White, Emily [Appointment Reminder] General Appointment @ 04/28/2016 8:00a- 04/28/2016 07:05 AM

Person, Unknown [Appointment Notification] General Appointment @ Apr 28 2016 8:00a- 04/28/2016 10:28 PM

White, Emily [Appointment Notification] General Advising @ Apr 26 2016 3:30p- 04/26/2016 09:14 PM

[Appointment Reminder] General Advising @ 04/05/2016 8:00a...



Key Takeaways

- Advisors and support staff can have two-way conversations with students via email or text
- The platform captures all conversations automatically for a complete digital record of all communications through the platform
- Students can receive push notifications to remind them of deadlines and priorities from their "Path" timeline



Staff Phase 1 & 2 Approach

Phase I (Fall 2019)



P1 Units Moving Forward

- Advising



P1 Feature Recommendations

- Appointment Campaigns
- Student Profile
- Advising Summary Reports & Notes
- Messaging Students (Text & Email)
- Advanced Search and Lists

- *Progress Report Campaign Pilot*

Phase II (Spring 2019)



P2 Units Moving Forward

- Additional Care Units (i.e. Tutoring, Career Services)



P2 Feature Recommendations

- Appointment Campaigns
- Student Profile
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- Messaging Students (Text & Email)
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- Student Initiated Appointment Scheduling
- Alerts & Case Management
- Progress Reports Campus-Wide



Progress Reports

Professor Home ▾

Teodor, please respond to the following progress report request(s):

- GradesFirst Support would like you complete 2 progress report(s) by **Friday, Jun. 02, 2017** | [Fill Out Progress Reports](#)
- Audrey Wilson would like you complete 1 progress report(s) by **Monday, Jun. 19, 2017** | [Fill Out Progress Reports](#)

Progress Reports > 3 Weeks into Term Check In > Edit

Step 1: Name & Message

Name your Progress Report Campaign, and provide a message for professors.

Step 2: Choose Students

Choose all students, subset of students, or classes that are to be monitored.

Step 3: Define Behavior

Define how your Progress Report will behave with thank you notes and expiration dates.

Step 4: Confirm

Confirm the students, enrollments which are the target of the Progress Report campaign.

Step 5: Send & Complete

Your Progress Report Campaign has been sent to Instructors.

Cancel?

Delete this unsent campaign.

Evaluation Requests To Be Sent

STUDENT	ID	PROFESSOR	COURSE	COURSE NAME	SECTION
1 Benito Abby	354534289	Bryon Adams	AAA 101	Multiple profs	001
2 Benito Abby	354534289	Teodor Hedrington	AAA 101	Multiple profs	001
3 Osma Brougher	049613583	Ashlee Demastus	PSYC-2103	INTRO TO HUMAN DEVELOPMENT	003
4 Katy Farkas	923933617	Ashlee Demastus	PSYC-2103	INTRO TO HUMAN DEVELOPMENT	003
5 Amrita Lorna	034808368	Maanir Hamzaee	CHEM1001	CHEM 1 PROBLEM SOLVING	1
6 Amrita Lorna	034808368	Katherine Matthews	ENGL2050	INTERIM EXPOSITORY WRITING	2
7 Medea Moffer	074796343	Kirsten Smith	3DS-3000	INTRO TO SCULPTURE	006
8 Sakina Nimmoms	555678636	Steven Kilpatrick	3DS-3000	INTRO TO SCULPTURE	003
9 Alohilani Ohanley	020531399	Ashlee Demastus	PSYC-2103	INTRO TO HUMAN DEVELOPMENT	003

You have selected to send a follow up thank you E-mail to professors.

[Back : Define Behavior](#) [Next : Send & Complete](#)

Key Takeaways

- Solicit feedback from faculty to understand individual student performance in each course
- Collect information on a student's likelihood of failing a class, their current or anticipated grade, absences, and the need for intervention
- Based on feedback, student support staff can intervene with students early and understand the reasons for risk, manage a Case for thorough follow-up from another office, and guide students to relevant resources

Alerts & Cases

Campus-Wide Alerts, Referrals, and Documentation for Case Management

The screenshot displays several windows from a Case Management software:

- Open Cases:** A grid showing student names, their status (e.g., Needs Tutoring, Financial Aid), and the date opened.
- Manage Case:** A window for Hamal Holliner regarding "Reason(s) Needs tutoring". It shows the case owner (Jamie Studwell) and assigned staff (Daria Alkonandres, Jesse Bridges, etc.).
- Issue an Alert:** A window for Caroline Romanoff. It asks for the reason (Financial Aid) and if it's associated with a class. It also has an "Additional Comments" section and a "Submit" button.
- Student Feedback:** A window showing student names and their risk status (Yes or No). It includes a note about marking all students as not at-risk.

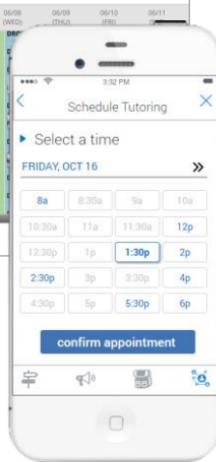
Key Takeaways

- Faculty, tutors, and other support specialists can submit one-click alerts on struggling students to notify advisors that they might be at risk
- Advisors can also solicit information directly from faculty through Progress Report campaigns sent directly to faculty email
- Case system allows users to generate cross-campus referrals for at-risk students right from the platform and assign them to appropriate support staff
- Advisors can see a complete digital history for each student—including advising reports, notes, and cases—thereby closing the loop for maximum effectiveness

Student Initiated Appointment Scheduling

Online Appointment Scheduling and Availability Management

The screenshot shows the Advisor Home interface. At the top, there are tabs: Students, Upcoming Appointments, My Availability, Advising Center, and Advising Requests. Below these is a section titled "Edit Appointment Constraints". Under "Times Available", there's a table with columns: SELECT, DAYS OF WEEK, TIMES, DATES, LOCATION, and SUBJECT. A row for Thursday has "12:30p-5:00p" in the TIMES column, "(do not use) Summer Executive" in the DATES column, "Academic Success Center" in the LOCATION column, and "Change Major/Minor, Degree Planning, General Advising" in the SUBJECT column. There's also an "Inactive/Edit" link. Below this is a "Comments:" input field and a "Choose A Time To Meet" dialog. The dialog shows a "Length: 10 min(s)" dropdown, a "Availables: 7" dropdown, and a "Show Availabilities for This Course/Req..." button. It lists time slots from 12:10p-12:20p to 1:40p-1:50p. To the right of the dialog is a smartphone displaying a mobile version of the scheduling interface.



Key Takeaways

- Appointment management allows advisors and students to schedule sessions based on both parties' availability, with the option to send reminders for upcoming appointments
- Real-time scheduling by various user types enables easy access to advisor and tutor services
- Students can access appointment scheduling from their desktops and smartphones

Appointment Scheduling: Recommended Approach

Phase I: Staff Initiated Appointment Scheduling

1

Advising Appointment Campaigns



- Located in **student emails**, student homepage in desktop site
- Students receive prompts from an advisor to schedule a specific type of appointment (i.e., registration pin appointment) and select an available time

2

Front Desk Scheduling



- Located in **Appointment Center**
- Front desk staff schedule, edit, and check students into their appointments via a scheduling grid of available advisors
- Students can drop in to appointments if advisors are available

3

Student Initiated



- Located on student homepage in desktop, or **Navigate Student**
- Students proactively schedule their own appointments, navigating through a series of questions to narrow down their options to meet with an advisor



EAB & Leadership Team to decide on **student scheduling Go-Live date**, once a majority of advisors have set up availability in the desktop site.

Student Phase 1 & 2 Approach

Phase I



P1 Users

- Incoming First Year Students



P1 Feature Recommendations

- Customized Intake Survey
- To-Do's: Orientation/New Students
- Academic Calendar & Resources Center
- Holds Center
- Major Explorer
- Connect Network
- Study Buddies

Phase II



P2 Users

- All Students (First Year to Fourth Year)



P2 Feature Recommendations

- Customized Intake Survey
- To-Do's: **All Students & Special Populations**
- Academic Calendar & Resources Center
- **Quick Polls**
- **Push Notifications**
- Holds Center
- Major Explorer
- **Appointment Scheduling**
- Connect Network
- Study Buddies

The Role of EAB Administrators



Application Administrator

Expert with an understanding of the overall student support structure on campus, basic technical knowledge, and larger rollout strategy

Responsibilities:

User Roles/Permissions Setup

- Understand and create user roles
- Manage permissions by user and by role

Initial Site Setup/Site Configurations

- Own building locations and services with workflow team along with other site configurations

Ongoing Support

- Maintain user access, roles, and permissions
- Modify any site-wide configurations
- Collect issue reports and enhancement requests
- Coordinate with technical team to troubleshoot data issues related to import files, log-in issues, etc.



Content Administrator

Guide content manager—has functional knowledge of advising and the student lifecycle, can coordinate additional content reviewers on campus

Responsibilities:

Publisher Role

- Adapt prepopulated EAB content with customized language for the institution into content management system
- Configures content to align with campus due dates
- Publishes finalized content

Content Development Role:*

- Works closely with content development team to solicit appropriate content edits
- *FUTURE: Segments specialized content based on relevant student subpopulations*

Ongoing Support

- Updates content based on new events and information

*Content Development responsibilities belong to the Content Development Team Lead, which is a role that the Content Administrator may hold at smaller institutions.



EAB

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