



EAB

Student Success Collaborative™  
Navigate

# CUNY – Queens College Implementation Strategy



**We help schools support students** from enrollment to graduation and beyond

➤ **ROOTED IN RESEARCH**

**7,500+** Peer-tested best practices

**500+** Enrollment innovations tested annually

➤ **ADVANTAGE OF SCALE**

**1,500+** Institutions served

**3.7 M+** Students supported by our SSMS

➤ **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



➤ Prepare your institution for the future

# What is EAB's Student Success Management System?

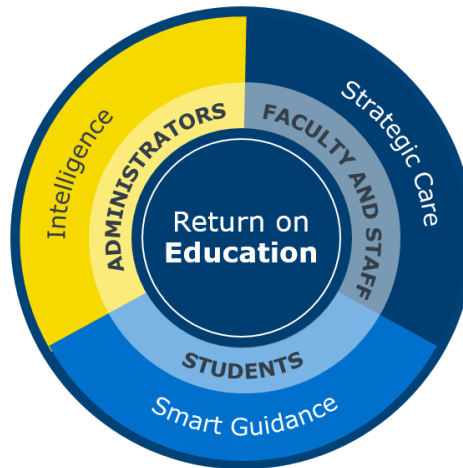


The SSMS is an **enterprise-level technology** links administrators, advisors, deans, faculty, other staff and students in a coordinated care network designed to help schools **proactively manage student success** and deliver a **Return on Education**.

## Our Platform Promise

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

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

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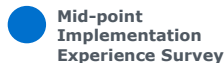
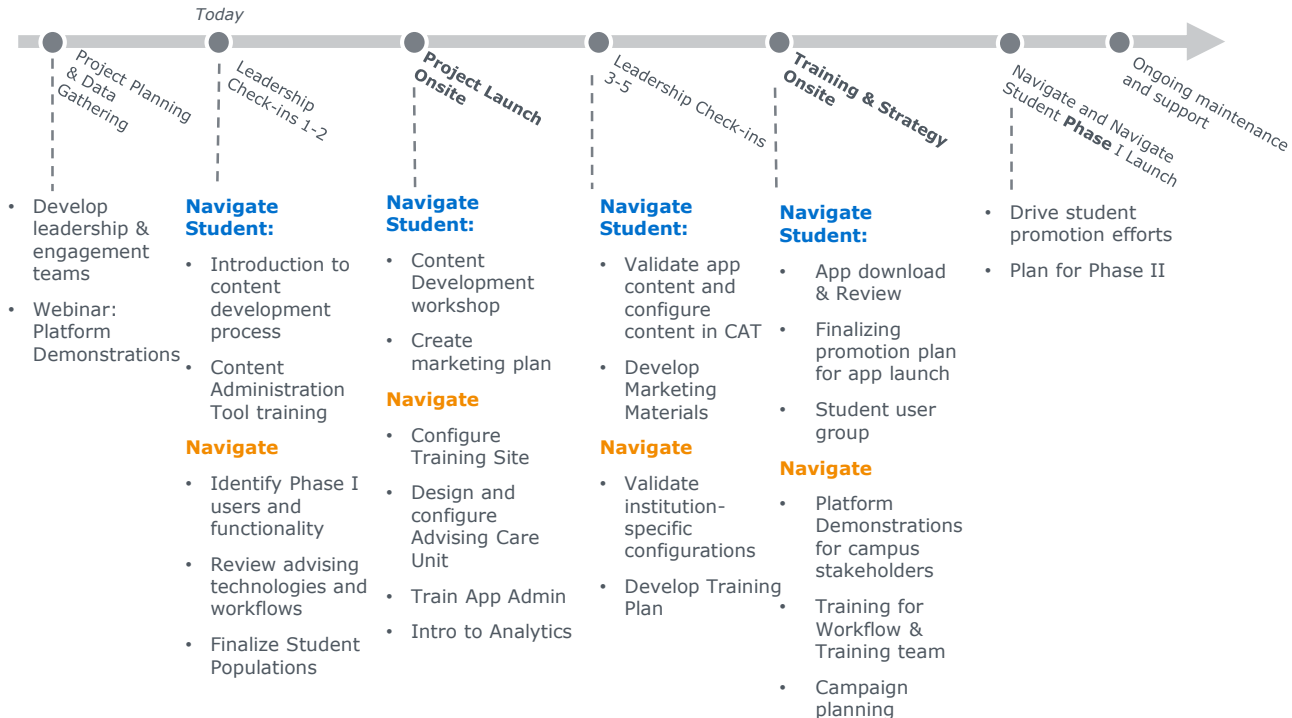
Provide **smart guidance** at the most pivotal moments along the college journey, simplifying and structuring pathways to completion.

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# 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

**Key Metrics:**

- Degree Grade: 0
- Reported Courses: 0
- Withdrawn Courses: 0
- Missed Success Markers: 4
- Cumulative GPA: 2.79

**Success Markers Table:**

Notification	Outcome
<b>BOL2107K</b> Recommended grade: D (1 course) Complete between 15 and 30 credits	Needs attention 1 Attempt
<b>BOL2109K and CHEM2120K</b> Recommended grade: C+ (2 courses) Complete between 30 and 45 credits	Needs attention 2 Attempts
<b>CHEM211K</b> Recommended grade: D (1 course) Complete between 0 and 15 credits	Needs attention 1 Attempt
<b>MATH210, MATH112 or Higher</b> Recommended grade: D (1 course) Complete between 15 and 30 credits	Needs attention 2 Attempts

### 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\*

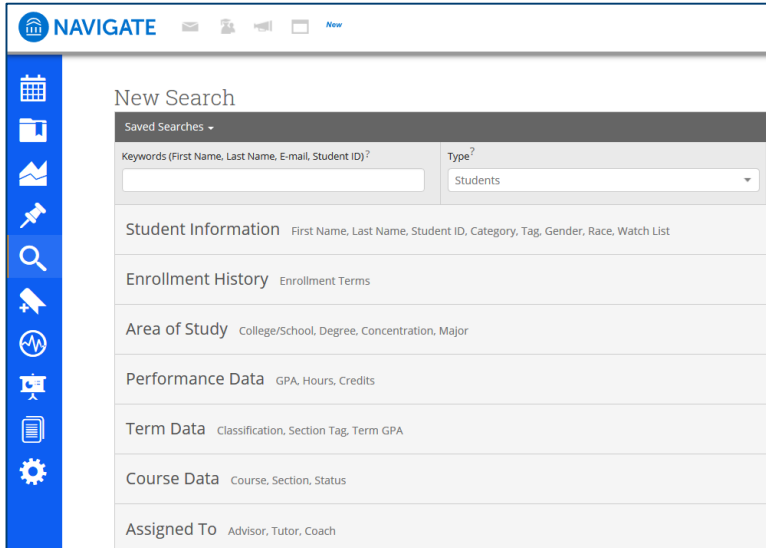


“Previously, we were advising based primarily on gut instinct. Now, we have all the data to give them an objective sense of where they are and what they can do to improve. The conversation has changed dramatically.”  
*Navigate Advisor*

\*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 NAVIGATE Advanced Search interface. At the top left is the NAVIGATE logo with a 'New' button. A vertical sidebar on the left contains icons for calendar, document, chart, pushpin, search, location, pulse, presentation, document, and settings. The main content area is titled 'New Search' and includes a 'Saved Searches' dropdown. Below this are two input fields: 'Keywords (First Name, Last Name, E-mail, Student ID)?' and 'Type?' with a dropdown menu currently set to 'Students'. A list of filter categories follows: 'Student Information' (First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List), 'Enrollment History' (Enrollment Terms), 'Area of Study' (College/School, Degree, Concentration, Major), 'Performance Data' (GPA, Hours, Credits), 'Term Data' (Classification, Section Tag, Term GPA), 'Course Data' (Course, Section, Status), and 'Assigned To' (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: Bascom Hall

Service: Academic Advising

Course: Start typing to search all courses

Meeting Type: In-Person

Date of visit: 1/10/2018

**Attendees**

- Support 436** (Admin, Advisor, Student, User) - Attended
- Marnie Aavang** (Student, Study Hall Monitor) - Attended

**Summary Details For Marnie Aavang**

Topics Discussed: Student is prepared and cleared to register for the upcoming term. Student expressed an interest in changing major.

Goals For Next Session: Yes No N/A

**Appointment Summary**

**ADD A NOTE TO MARNIE AAVANG**

Note (Required)

Note Subject: Marnie Aavang (Student, Study Hall Monitor)

Relations: Note Reason, Note URL

Visibility:
 

- Support 436 Only?
- Marnie Aavang?
- Printed Student Report

Attach File: Browse... 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
						1
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 [inrjyoz38@qeuqubi.syz.alp](mailto:inrjyoz38@qeuqubi.syz.alp) the morning of your appointment.

You will be sent a text reminder to 2025555555 the morning of your appointment. [\[change\]](#)

Review Appointment Details

NAME	STATS
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <div> <b>Fall Advising</b>  <small>ADVISING 08/18/2017 - 11/30/2017</small> </div> </div>	<div style="display: flex; justify-content: space-around; align-items: center;"> <span><span style="color: green;">●</span> Appcs. Made (100%)</span> <span><span style="color: green;">●</span> Reports Created (100%)</span> <span><span style="color: green;">●</span> Attend. Rate (100%)</span> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <div> <b>Re-Enrollment Campaign</b>  <small>ADVISING <span style="color: red;">[Expired]</span> 08/18/2017 - 09/01/2017</small> </div> </div>	<div style="display: flex; justify-content: space-around; align-items: center;"> <span><span style="color: gray;">●</span> Appcs. Made (7%)</span> <span><span style="color: green;">●</span> Reports Created (33%)</span> <span><span style="color: gray;">●</span> Attend. Rate (3%)</span> </div>

### 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 12/15/2014  
 From: David Johnson  
 To: Mark Miller  
 I'm thinking of changing majors. What's my next step?

Via email 12/15/2014  
 From: Mark Miller  
 To: David Johnson  
 Let's talk at your degree planning check in that's coming up. Do you have any majors of interest?

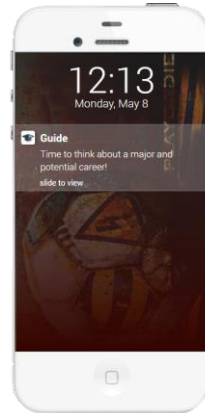
Via email 12/15/2014  
 From: David Johnson  
 To: Mark Miller  
 I'm thinking Business or Psychology.

Via SMS 1/12/2014  
 From: David Johnson  
 To: Mark Miller

Ulan Derrig

Overview Success Progress Reports / Notes Class Info Major Explorer More

Galtva, Ben	Text - hello Ulan Derrig! You have been ...	05/26/2016 09:25 AM
White, Emily	[Appointment Reminder] General Appointment @ 05/05/2016 8:00a-8:30a - Appointment Reminder This is to r...	05/05/2016 07:04 AM
Person, Unknown	[Appointment Notification] General Advising @ May 04 2016 11:00a-12:00p - Appointment Scheduled An appoint...	05/04/2016 09:24 PM
White, Emily	[Appointment Notification] General Appointment @ May 05 2016 8:00a-8:30a - An Appointment has been Schedule...	05/04/2016 09:14 PM
White, Emily	[Appointment Notification] General Advising @ Apr 28 2016 4:30p-5:30p - Appointment Scheduled An appoint...	04/28/2016 11:16 AM
White, Emily	[Appointment Reminder] General Appointment @ 04/28/2016 8:00a-8:30a - Appointment Reminder This is to r...	04/28/2016 07:06 AM
Person, Unknown	[Appointment Notification] General Appointment @ Apr 28 2016 8:00a-8:30a - An Appointment has been Schedule...	04/28/2016 10:30 PM
White, Emily	[Appointment Notification] General Advising @ Apr 26 2016 3:30p-4:30p - Appointment Scheduled An appoint...	04/26/2016 03:14 PM
	[Appointment Reminder] General Advising @ 04/05/2016 4:00p-4:30p	04/05/2016



### 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



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## Phase II (Spring 2019)



### P2 Units Moving Forward

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



### P2 Feature Recommendations

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# 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.

Based on your student selection(s), the application will send 9 evaluation requests for 7 students in 6 sections to 7 professors. Below is a list of all the evaluation requests that will be sent. Please review the list to ensure all desired students and courses are included.

### Evaluation Requests To Be Sent

	STUDENT	ID	PROFESSOR	COURSE	COURSE NAME	SECTION
1	Bento Aaby	354534289	Bryon Adams	AAA 101	Multiple profs	001
2	Bento Aaby	354534289	Teodor Waddington	AAA 101	Multiple profs	001
3	Osma Brougher	049613683	Ashlee Demastus	PSYC-2103	INTRO TO HUMAN DEVELOPMENT	003
4	Kay Farkas	92393617	Ashlee Demastus	PSYC-2103	INTRO TO HUMAN DEVELOPMENT	003
5	Amrita Lorna	034808368	Maanlie Hamaaee	CHEM1001	CHEM 1 PROBLEM SOLVING	1
6	Amrita Lorna	034808368	Katherine Mattheus	ENGL2050	INTERM EPOSITORY WRITING	2
7	Medea Moffet	074796343	Kirsten Smith	3DS-3000	INTRO TO SCULPTURE	006
8	Sakina Nimmons	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.

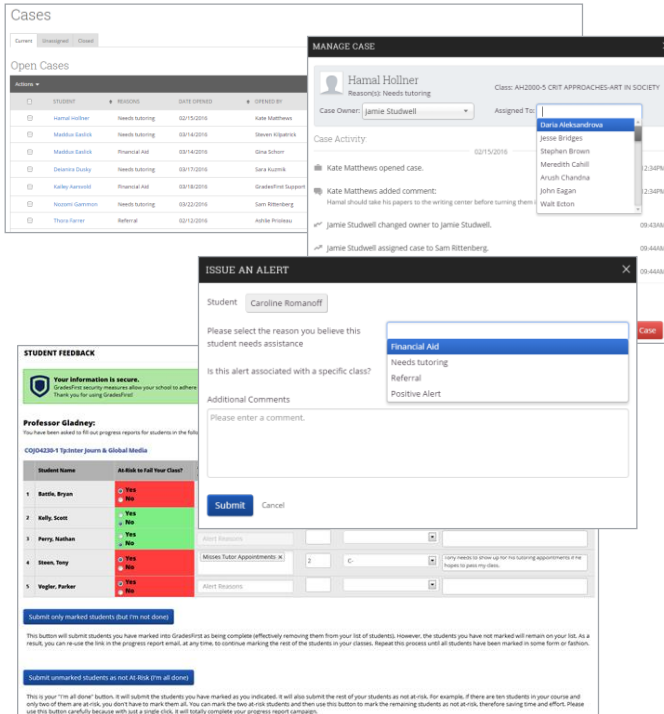
[Back: Define Behavior](#) [Next: Send & Complete](#)

## 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



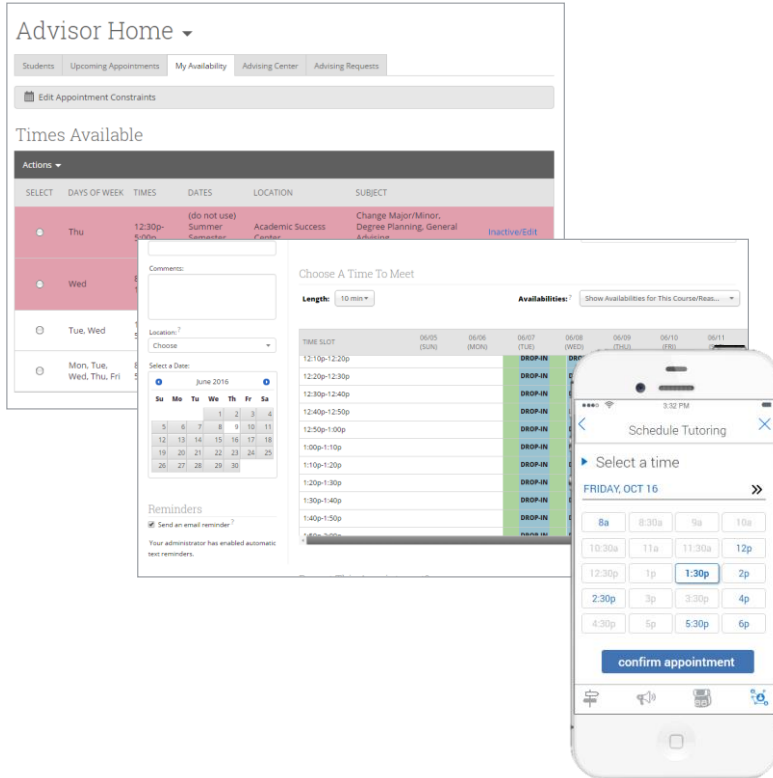
The screenshots illustrate the user interface for case management. The 'Cases' screen shows a list of open cases with columns for subject, reason, date opened, and opened by. The 'MANAGE CASE' screen shows details for a student named Hamal Hollner, including the case owner (Jamie Studwell) and a list of case activity with dates and times. The 'ISSUE AN ALERT' screen shows a form for issuing an alert to a student named Caroline Romanoff, with a dropdown menu for selecting the reason (Financial Aid, Needs tutoring, Referral, Positive Alert). The 'STUDENT FEEDBACK' screen shows a table of students with columns for student name, at-risk status, and a 'Yes/No' indicator for marking them as 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 image displays two overlapping screenshots of the appointment scheduling system. The background screenshot is the 'Advisor Home' web interface, which includes navigation tabs for 'Students', 'Upcoming Appointments', 'My Availability', 'Advising Center', and 'Advising Requests'. Below these is an 'Edit Appointment Constraints' button and a 'Times Available' section. The 'Times Available' section features a table with columns for 'SELECT', 'DAYS OF WEEK', 'TIMES', 'DATES', 'LOCATION', and 'SUBJECT'. A table row shows a Thursday 12:30p slot for 'Academic Success' at 'Summer Eastman' with a 'Change Major/Minor, Degree Planning, General Advising' subject. Below the table are fields for 'Comments', 'Location', and 'Select a Date' (set to June 2016). A 'Reminders' section is also visible.

The foreground screenshot is a mobile app interface titled 'Schedule Tutoring'. It shows a 'Select a time' screen for 'FRIDAY, OCT 16'. A grid of time slots is displayed, with '1:30p' selected and highlighted in blue. Other slots include 8a, 8:30a, 9a, 10a, 10:30a, 11a, 11:30a, 12p, 12:30p, 1p, 2p, 2:30p, 3p, 3:30p, 4p, 4:30p, 5p, 5:30p, and 6p. A 'confirm appointment' button is at the bottom.

### 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



## 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

Education Advisory Board

2445 M Street NW, Washington DC 20037

P 202.266.6400 | F 202.266.5700 | [eab.com](http://eab.com)