The Emerging Discipline of Student Success Management
Start with best practices research

- Research Forums for presidents, provosts, chief business officers, and key academic and administrative leaders
- At the core of all we do
- Peer-tested best practices research
- Answers to the most pressing issues

Then hardwire those insights into your organization using our technology & services

Enrollment Management

Our Royall & Company division provides data-driven undergraduate and graduate solutions that target qualified prospective students; build relationships throughout the search, application, and yield process; and optimize financial aid resources.

Student Success

Members, including four- and two-year institutions, use the Student Success Collaborative combination of analytics, interaction and workflow technology, and consulting to support, retain, and graduate more students.

Growth and Academic Operations

Our Academic Performance Solutions group partners with university academic and business leaders to help make smart resource trade-offs, improve academic efficiency, and grow academic program revenues.

1,100+
College and university members

10,000+
Research interviews per year

475M+
Course records in our student success analytic platform

1.2B+
Student interactions annually
The Student Success Collaborative

Leveraging Technology, Research, and Consulting to Drive Meaningful Student Success Improvements

**400+ Colleges and Universities Sharing Insights and Resources to Address the Student Success Challenge**

- Product innovation based on research, driven by members
- Proven best practices to help leaders drive change management
- Strategic, customized approach to implementations and support

**The Student Success Management System**

- Business Intelligence
- Predictive Analytics
- Early Academic Alerts
- Appointment Scheduling
- Case Management
- Student Planning
The Evolution of Student Success

EAB’s Deep Expertise in Student Success

10+ Years of research
20+ Studies completed
200+ Published best practices

2010s
The success challenge dramatically expands in scope as a result of the Great Recession

2000s
Advent of early warning systems and other technology-enabled strategies

Pre-2000
Early strategies focused primarily on student attitudes and the needs of specific populations

Beyond First-Year Retention:
*The Nation’s New Student Success Mandate:*

1. Graduate More Students
2. In Less Time (and at Lower Cost)
3. With Better Post-Grad Outcomes

*Our Mission is to Help Schools Generate a “Return on Education”*
Despite Years of Intense Attention, Grad Rates Have Barely Improved

National 6-Year Graduation Rate

How Do We Generate a “Return on Education”?

1. Graduate more students
2. In less time (and lower cost)
3. With better post-grad outcomes

Source: https://nces.ed.gov/programs/digest/d16/tables/dt16_326.10.asp

1) * 2007 rate is carried over from prior year due to lack of available data

©2015 The Advisory Board Company • eab.com
How Are We Organizing for Success?
Who Owns Student Success?

Suddenly, “Owned by Everyone, Owned By No One” No Longer Applies

Who oversees key services and can manage numbers?
- Enrollment Manager

Who has academic credibility and runs the first year?
- VP of Undergrad Studies

Who owns the curriculum and the purse strings?
- Academic Deans

Student success just needs to be someone’s job
- VP of Student Success

Who understands the non-academic roots of attrition?
- VP of Student Affairs

Who has academic credibility and runs the first year?
- The First Year Experience

Who oversees key services and can manage numbers?
- Departmental Programming

Student success just needs to be someone’s job
- Success Data and Dashboards

Who understands the non-academic roots of attrition?
- Overseeing Initiatives

The Hypothetical Student Success Office

Source: EAB interviews and analysis.
The Evolving Role of the Advisor

Moving Beyond Registration to Put Student Success at the Core

How Many Advisors View Their Role...
Student success often seen by advisors as an add-on responsibility to registration

...And How that Role is Evolving
Advisors increasingly asked to play many roles, with student success at the center

Student Success
Early alert response
Case management

Registration
Course planning
Major guidance

Specializations
First-year seminars
Personal counseling
Financial advising
Career advising

Student Success
Registration
Financial Well-Being
Student Success
Career Preparation
Academic Performance

©2015 The Advisory Board Company • eab.com
We Are Making Major Investments in Advising

Institutions Adding Staff and Tech to Modernize the Advising Enterprise

Institutional Investments in Advising
Last Three Years (2013-2016)

- 36% have invested in adding advising staff
- 44% have invested in new advising technologies

Goals:
- Reduce advising ratios (300:1 target)
- Supplement faculty advising
- Install “accountable advisors:

Goals:
- Optimize advisor efforts
- Provide better customer service
- Network support offices

Most Advisors (Still) Lack Professional Incentives

Recent Investment in Advising Not Matched by Reward Structures

Most Advisors Not Meaningfully Evaluated

45.8% of institutions reported they have assessment efforts in place for advising
(2011, N = 770)

21.4% of institutions evaluate individual advisors according to job performance criteria
(2011, N = 770)

11.9% of professional advisors report having a career ladder to reward performance
(2011, N = 603)

Barriers to Centralized Evaluation

Decentralized Structure
Differing advisor responsibilities across units; difficult to capture/standardize data

Advisor Resistance
Advisors do not feel they are set up for success; lack of trust in most metrics


©2017 EAB • All Rights Reserved • eab.com
Rolling Out the Goal Worksheets

Initial Challenges to Advisor Buy In:

- Felt it prioritized registration above having quality conversations with students
- Worried they would be reprimanded for missed goals
- Difficult to balance supporting enrollment goals with reality that some students are not ready to enroll (e.g. upcoming deployments)

Early Benefits:

- Allowed for primitive forecasting related to additions or cancellations to the schedule
- Empowered advisors to advocate for changes to policies and procedures that were impacting their ability to get their students registered

---

Advisor Name: John Doe
College: College of Business
Advising Caseload: 388
Total Advising Reports: 79
Total Advising Reports: 26
Total “Touches:” 105

Summer & Fall 2017 Advisement & Reregistration Goal Worksheet (Excerpt)

<table>
<thead>
<tr>
<th></th>
<th>Summer 2017</th>
<th>Fall 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current # of Students Reregistered</td>
<td>152</td>
<td>178</td>
</tr>
<tr>
<td>Goal # of Students Reregistered</td>
<td>186</td>
<td>303</td>
</tr>
<tr>
<td>Reregistration Goal Achievement</td>
<td></td>
<td>81.62%</td>
</tr>
<tr>
<td>Current Summer Reregistration Rate</td>
<td>39%</td>
<td>45%</td>
</tr>
<tr>
<td>Goal Summer Reregistration Rate</td>
<td></td>
<td>48%</td>
</tr>
<tr>
<td>Reregistration Goal Achievement</td>
<td></td>
<td>58.82%</td>
</tr>
<tr>
<td>Goal Fall Reregistration Rate</td>
<td></td>
<td>78%</td>
</tr>
</tbody>
</table>

---
Merit-Based Advising Career Ladder

Management Opportunities Help to Recruit and Retain High Performers

Four-step promotion path places advisors in increasingly managerial roles

Annual evaluations track advisor performance on concrete objectives

Sample Review Metrics

Student Success
- Persistence by cohort
- Total earned credits
- Student GPAs
- At-risk student performance
- Term registration
- Stop-outs gained

Faculty Engagement
- Early alert interventions
- Students attended tutoring

College Affordability
- Financial aid status
- FAFSA forms completed

1. Promise of upward career mobility attracts better-quality candidates
2. Less staff turnover and greater employee engagement
3. Metric-based evaluation and promotion process incentivizes high performance

Source: EAB interviews and analysis.
Where Are We Focusing Our Efforts?
Too Much Focus on the FY Retention Metric

Federal Rates Fail to Fully Capture Overall Institutional Performance

The problem with First-Year Retention

- 17% of all students are included in first-year retention metric each year

  Who’s not counted:
  - Upper-class students
  - Part-time first-years
  - Transfer students
  - Non-degree seekers

The problem with Six-Year Graduation

- 61% of incoming students are eligible for six-year graduation metric

Source: Education Advisory Board interviews and analysis; Integrated Postsecondary Education Data System
Timing of Dropout
SSC National Data Set

- 1st Year Attrition: 22.7%
- 2nd Year Attrition: 8.5%
- 3rd Year Attrition: 4.7%
- 4th Year Attrition: 4.2%
- 5th Year Attrition: 3.0%
- 6th Year Attrition: 4.5%
- Total Students: 22.7% First-year dropouts, 24.9% 2nd – 6th year dropouts, 4.0% >6 years, outcome unknown, 48.4% Six-year graduates

Over half of all attrition goes untracked until as much as five years later.

Official Metric: First-to-Second Year Retention of FT/FT Students

The Dark Times
No widespread collection or reporting of interim attrition rates

Official Metric: Graduation Rate of FT/FT Students Within Six Years

Most Attrition Actually Occurs in Later Years (and is Poorly Tracked)
We Are Managing to the Metric

Success Practices Focused Very Early and Very Late, Not in the Middle

Prevalence of Retention Practices Targeted to Specific Students

<table>
<thead>
<tr>
<th>First-year students</th>
<th>Second-year students</th>
<th>Third-year students</th>
<th>Fourth-year students</th>
<th>Students close to completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>94%</td>
<td>29%</td>
<td>Not reported</td>
<td>Not reported</td>
<td>76%</td>
</tr>
<tr>
<td>98%</td>
<td>20%</td>
<td>?</td>
<td>?</td>
<td>67%</td>
</tr>
</tbody>
</table>

Just 9% of privates and 7% of publics report that their second-year retention practices are “Very Effective”.

Noel-Levitz “2013 Student Retention and College Completion Practices Report for Four-Year and Two-Year Institutions”.  
http://www.noellevitz.com/BenchmarkReports
Investments in the First Year May Not Be Generating a Graduation ROI

**Change in FY Retention vs Change in 6-Yr Graduation**

N = 1,011 colleges and universities

A 2% improvement in retention rate translates on average to just a 1% improvement in graduation rate.

**Weak R-squared** (0.2304) suggests that even this relationship is fuzzy.

Source: Education Advisory Board interviews and analysis; Integrated Postsecondary Education Data System
The Murky Middle

Large Numbers of Mid-Range Students Leaving Sophomore Year or Later

Histogram of All Students by First-Year GPA
SSC National Data Set

- Graduates within 6 Years (357,405 students)
- Continued Enrollees Past 6 Years (29,826 students)
- 2nd to 6th Year Departures (183,827 students)
- 1st Year Departures (167,697 students)

**The Murky Middle**

- 84% return for a second year
- 48% graduate within six years

Source: EAB research and data analysis.
A New Way Forward?

Murky Middle Might Be Relatively Easy to Assist Compared to Others

**Predominant First-Year Attrition**

- **Academically Adrift**
  Severe academic difficulties, may need remediation and time to mature before completing

  - Too costly to remediate?

- **Poor Fit for Campus**
  Not well-matched to campus culture and offerings, will likely transfer to another school

  - Too difficult to engage?

**Second-Year and Third-Year Attrition**

- **Unknown Causes**
  Academically qualified and well-matched to campus, causes of attrition poorly understood

  - Best chance for ROI?

Source: EAB Interviews and Analysis
Looking for Reliable Indicators

GPA Trends Foreshadow Departure Several Terms in Advance

Murky Middle Term GPA Trends Over Time
Students With First-Year GPA 2.0 to 3.0

Surprise finding: Academic probation policies won’t catch many dropouts until it’s too late.
How MTSU is Addressing the Murky Middle:

1) Designate the Murky Middle as a risk population
2) Modify advising techniques to increase interactions with this group
3) Catch weakening academic performance before probation
4) Teach students how to use campus resources (esp. academic support)
5) Encourage social involvement and participation in campus organizations

Proactive Outreach Producing Gains

Midd Tenn State Using Special Advising Sessions to Target Murky Middle

Sophomore-to-Junior Retention
Middle Tennessee State University

Outreach begins

<table>
<thead>
<tr>
<th>Year</th>
<th>Retention Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011-12</td>
<td>77.1%</td>
</tr>
<tr>
<td>2012-13</td>
<td>78.2%</td>
</tr>
<tr>
<td>2013-14</td>
<td>78.5%</td>
</tr>
<tr>
<td>2014-15</td>
<td>80.0%</td>
</tr>
<tr>
<td>2015-16</td>
<td>80.6%</td>
</tr>
</tbody>
</table>

Midd Tenn State Using Special Advising Sessions to Target Murky Middle
What’s Next?:
Three Future Directions
FUTURE DIRECTION #1:

Develop Mechanisms to Innovate Quickly

Lack of “Fast Cycle” KPIs Limit the Pace of Experimentation and Discovery

Our Current Innovation Cycle Takes a Full Year

Candidate Real-Time KPIs:

Advising
- Appointments
- Email response
- Degree plans on file

Administrative
- Registrations
- Bursar holds
- FAFSA completion

Academic
- Absenteeism
- Early alerts
- LMS engagement

Real-time KPIs could speed innovation
FUTURE DIRECTION #2:

Enable Curricular Reform Through the Faculty

Faculty Can (and Should) Streamline the Curriculum, but Need Some Help

Bypass IR office backlog to deliver data directly to faculty and staff

Incentivize grassroots improvements with scorecards and funding

Cultivate innovations with dedicated project management support

Curricular Reform Initiatives at SSC Members

- Changed chemistry requirements
- Made reforms to lower DFW rates
- Created four-year degree plans
- Ran campaigns for key courses

University of Wisconsin Eau Claire

Student success scorecard allows departments to compete for $400K in discretionary funds

Portland State University

Innovation teams completed 24 student success improvements in just 18 months

Source: EAB interviews and analysis.
FUTURE DIRECTION #3:

Deploy Strategic Financial Aid

Microgrants of $1,000 or Less Can Make a Huge Difference

Strategic grants of $1,000 or less are repeatedly shown to improve outcomes.

Funded by:
- President or trustees
- Unspent endowment
- Alumni fundraising
- Aid returned by stop-outs

Grants awarded for GPA and progress
- +5% retention

Discretionary emergency grants
- +5%-8% retention

Qualified bursar balance forgiveness
- 70% graduate

Reenrollment grants for senior stop-outs
- 71% graduate

Source: EAB interviews and analysis.
Five Pillars of Student Success Management:

1. Modernize the Advising Enterprise
2. Expand Focus Beyond the First Year
3. Develop Mechanisms to Innovate Quickly
4. Enable Curricular Reform Through the Faculty
5. Deploy Strategic Financial Aid
Thank You

Ed Venit
Senior Director
Evenit@eab.com

Follow me on Twitter!
@ed_venit

©2015 The Advisory Board Company • eab.com