Advising & Student Success Playbook

High impact, evidence-based advising practices that improve student outcomes

When we reviewed over 1,000 initiatives and programs from more than 55 colleges and universities, we found that advising has the highest impact on improving student success.

Applying a rigorous, data-science analysis approach, advising programs can lift persistence by 5.8 percentage points on average. As higher education rapidly changes, data shows that effective advising matters more than ever.

Advising has a higher lift for students early in their academic careers. And, for more vulnerable students, it has an even greater measured persistence lift.

It consistently ranks as a top-performing investment because when it works, it works really well. Perhaps most importantly, in a study with the Center for Generational Kinetics, 80% of students stated that they are most confident in turning to an advisor for support. Students know advising works, too.

Yet, despite best efforts, 47% of advising programs studied aren’t improving student outcomes. This means advising alone doesn’t guarantee success. Instead, the most effective advising programs take a data-activated approach that proactively connects students to the most impactful support.

This playbook shares evidence-based practices Civitas Learning partner institutions use to build highly effective academic advising teams. We hope it will help your team make an even more significant impact on student success at your institution.
Know There’s More Than What Meets the Eye

Identify new opportunities to support students and get them across the finish line.

A student’s GPA doesn’t tell the whole story. We looked at 4 million students from 62 institutions and learned that 98% of institutions are losing more students with above a 2.0 GPA than below. 44% of the non-persisting students had above a 3.0 GPA.

Even if a student is close to completion, they may still be battling unseen challenges to cross the finish line. In a study of 53 colleges and universities, we found that nearly 1 in 5 students who leave without a degree reached 75% of the credit threshold. And, more than 1 in 10 students who leave without a degree have completed 90% of the credit threshold.

When students face challenges during their academic experience, it’s often not just academics that make it more difficult for them to persist toward graduation. It’s non-academic, or “extra-academic,” challenges that make learning one of many things they’re thinking about. They’re dealing with housing and food insecurity. Family commitments. Work obligations. Life and logistics. These are just some of the challenges our students increasingly face, and they need our help.

Advisors should be able to focus on helping students with these challenges. That becomes much easier when advisors and student success teams have a holistic understanding of each student. Focusing care is also easier when an advisor can be prepared for a constructive advising session or appointment because advising notes and student information are available in a unified view.

When supporting your students, be sure to seek out opportunities to conduct proactive outreach to help your students throughout the term. Use academic and behavioral data to provide students with the just-in-time resources and services they need to persist toward graduation.

Meet Your Students Where They Are

Personalization matters, but it doesn’t have to be in-person to be effective.

In our study with the Center for Generational Kinetics, students shared that they want advisor connections that are personalized, proactive, and focused.

More than anything, students want you to know them and the reality of their circumstances. When you connect with your students, ensure you have their specific information at your fingertips. When preparing for an advising appointment, ask your students to add their required breaks into their schedule (like work, daycare, dropoff, sports practice, etc.) before the advising session.

This gives you additional context on their extra-academic commitments and frees up time during the conversation to have a discussion instead of taking care of more transactional tasks.

WHAT WOULD MAKE ADVISOR RELATIONSHIP MORE MEANINGFUL? (BY TOTAL, TOP 8 OF 13)

<table>
<thead>
<tr>
<th>What Matters Most</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advisor is knowledgeable about the institution, professors, culture, etc.</td>
<td>30%</td>
</tr>
<tr>
<td>Advisor knows me and my current situation</td>
<td>30%</td>
</tr>
<tr>
<td>Advisor proactively reaches out to support me</td>
<td>27%</td>
</tr>
<tr>
<td>Advisor is very available to meet with me</td>
<td>26%</td>
</tr>
<tr>
<td>Advisor does not rush me when we are meeting</td>
<td>25%</td>
</tr>
<tr>
<td>Advisor connects with me personally</td>
<td>23%</td>
</tr>
<tr>
<td>Advisor is accessible through multiple channels</td>
<td>23%</td>
</tr>
<tr>
<td>Advisor already knows my academic history</td>
<td>23%</td>
</tr>
</tbody>
</table>
Students also said they don’t expect to meet with an advisor whenever they need support. They are also open to digital interactions. This means we can re-think outreach and support channels. 56% of students prefer online and digital coaching, like email, text, or video conferencing.

Some students don’t need to meet – and in fact, the ones who set appointments might be the students who need the least amount of support. Often, the students who aren’t meeting in person need the most help. The good news is that they are open to various connections and support. This allows advisors to engage with students through communication channels like email, text, group advising sessions, and one-to-one appointments.

Access to real-time behavioral and academic data enables you to monitor indicators of student success, such as LMS engagement relative to peers in their class, to proactively identify students needing help. Rather than sending out mass communications to all students, this insight allows you to prioritize which students you’re engaging with and conduct tailored outreach to offer the proper support in the student’s academic experience.

As students face new challenges throughout each term, there is an opportunity to adjust engagement strategies if their persistence prediction shifts. Students experience risk (and opportunity) as the weeks progress, and it’s important to have visibility into those changes.

Those may be the moments when your outreach matters most. As a student success professional, your experience in higher education, knowledge of your students, and availability of resources will guide what interventions you use to effectively influence your students’ success and change their trajectory. Because that’s really what this is all about.

Tune Engagement Strategy to the Level of Support Students Need

Prioritizing engagement ensures each student gets the support they truly need.

High caseloads often make it impossible to provide personalized support for every student. You can’t take a one-size-fits-all approach to support students. Instead, you need a reliable way to identify which students navigate college without significant difficulties and which students need more hands-on support. Knowing who will likely benefit from one-to-one interaction allows you to prioritize engagement with those students whose behavior and circumstances suggest they may benefit from additional support.

USE DATA TO INFORM YOUR ENGAGEMENT STRATEGY:

<table>
<thead>
<tr>
<th>COMMUNICATION MODALITY</th>
<th>RESOURCE REFERRAL: ONE-TO-MANY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media</td>
<td>- Social media</td>
</tr>
<tr>
<td>Mass Email Messages</td>
<td>- Print &amp; digital flyers</td>
</tr>
<tr>
<td>Digital Flyers</td>
<td>- Mass email messages</td>
</tr>
<tr>
<td>Printed Flyers</td>
<td>- Video clips</td>
</tr>
<tr>
<td>Video Clips</td>
<td></td>
</tr>
<tr>
<td>Phone Outreach</td>
<td></td>
</tr>
<tr>
<td>Personalized Emails</td>
<td></td>
</tr>
<tr>
<td>Group Advising</td>
<td></td>
</tr>
<tr>
<td>Mobile Communication</td>
<td></td>
</tr>
<tr>
<td>Virtual Appointments</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERIODIC ENGAGEMENT: ONE-TO-FEW</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Mobile communication</td>
</tr>
<tr>
<td>- Invitation to virtual programs or events</td>
</tr>
<tr>
<td>- Personalized emails</td>
</tr>
<tr>
<td>- Group advising</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HIGH ENGAGEMENT: ONE-TO-ONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Shared comments or notes</td>
</tr>
<tr>
<td>- Virtual appointments</td>
</tr>
<tr>
<td>- Phone outreach</td>
</tr>
</tbody>
</table>

Be Proactive and Be Deliberate

Doing more or adding more people often is not a solution.

To offset or mitigate capacity constraints, be proactive. While adding more staff can be helpful, it’s not always the right fix – or an option. It can’t be the only way you scale.

Those who benefit the most from advising are also the least likely to voluntarily engage with advisors. Proactive outreach is needed to make a dent in outcomes for those students.

We also know advisor meetings are incredibly valuable, although there isn’t the bandwidth to require an advisor meeting with every student. Advisors can’t just do more.
Here are a few proven strategies to overcome limited capacity:

- Develop the right proactive outreach calendar for your campus. Regular, timely nudges or outreach can make it easier for you to open up channels with your students.
- Engage throughout the term instead of only around registration.
- Identify the student groups that most need your support. Let that help you prioritize your day and inform the workflow across your team.
- Look closer at your advising process and student experience. Are there embedded barriers that limit student progression and on-time completion? What can be streamlined?

---

**Build a Student Success Coalition**

One person, team, or program alone cannot sustainably improve student outcomes.

Although advising is one of the most powerful student success initiatives, it becomes even more impactful when everyone on campus is involved. Isolated efforts and interventions won’t deliver sustainable outcome improvements.

**To provide the care your students need, you must:**

- Coordinate around a consistent source of information
- Monitor activity and outputs to iterate real-time
- Share notes and context while managing FERPA requirements
- Close the loop on faculty feedback
- Assess the effectiveness of student success initiatives

The most effective advising programs and initiatives apply a coordinated approach to student care and support. There is an entire student success network that can be powered with the context they need and the workflow they want. Don’t design your support to match your advising technology. Make sure your technology is flexible enough to support the process your students and staff need.

---

**Use Automated Alerts with Caution**

Don’t send automated alerts without your input.

30% of automated alerts don’t work – nearly one in three automatic alert messages, whether kudos or warnings, negatively or neutrally impacted student success.

Some examples of these alerts include automatic messages or alerts to students based on attendance concerns, low-class participation, not registering, low-grade concerns, other academic concerns, in danger of failing, not logging into online courses, course withdrawal, and insufficient academic progress.

Consider this an early warning about early warnings – how you communicate to your students matters. Automated alerts do not make the most of human intelligence or your experience in tailoring support based on the circumstances of a particular student.

As you consider your outreach and nudging strategies, plan to move from transactional messages to communication designed to transform behavior. And don’t let an alert automate student outreach without your input.
When crafting nudges and messages for your students, be sure to consider:

- **When you send a message.**
  *Just-in-time or consistent outreach shows that you’re looking out for them.*

- **How you say what you say.**
  *Your students can feel your intent, so let it shine.*

- **What you recommend.**
  *A little bit of personalization goes a long way.*

**WHAT IF THE MESSAGE CHANGED FROM THIS...**

**Subject Line: Absence Reminder**

As a reminder, if you miss more than 6 classes, this will be an automatic failure of this class.

You have already missed 2 classes. You are close to failing this class due to excessive absences. Please let me know if you have any questions.

**TYPICAL ALERT MESSAGING:**

-1% TO -10% (PP) DROPS IN PERSISTENCE

**TO A MORE PERSONALIZED MESSAGE LIKE THIS?**

**Subject Line: Are You Okay?**

I noticed that you missed 2 classes and I am checking in to see if you are okay.

Often students who have missed class worry that they can’t catch up. You can! I’m here to help. Respond to this email and we can discuss how to get back on track.

Thank you for being my student.

**POSITIVE MINDSET MESSAGING:**

+1% TO +10% (PP) LIFTS IN PERSISTENCE

When typical alert messaging was sent to students, we saw -1 to -10 percentage point drops in persistence. On the other hand, when the message changed to something rooted in a positive mindset...there was a 1 to 10 percentage point lift in persistence.

It’s essential to be cautious when using automation. Don’t rely on simplistic, automated alerts as a default intervention with students. What we say and how we say it matters. While it may seem like automated or transactional messaging is an excellent way to ease capacity constraints, in many cases, this impersonal approach to student support can diminish trust and decrease engagement with students.

---

**Keep Learning the Needs of Your Students**

Know what works, and for whom.

It’s not feasible to provide customized support for every student. The challenge for institutions is identifying which students navigate college without significant difficulties and which students need more hands-on support. Doing so helps advisors serve all students while focusing on those students whose behavior and circumstances suggest they may benefit from additional support.

When the University of Central Oklahoma reviewed the impact of their Student Transformative Learning Record, they found that it delivered a 12-15 percentage point lift in persistence overall. This helped them confidently report on and scale the grant-funded program – and now, other schools across the country are doing the same. Other examples include Snow College, where an initiative analysis revealed that while all students benefit from personalized advising services, lower-performing students saw a 20% boost in persistence due to an individual advising meeting compared to a 3% lift among high-performing students. Austin Community College studied the impact of their ACCelerator program, which bolsters persistence for their students to the tune of 3 percentage points, with a 4X increase for DevEd students.
The list of what's known to work goes on across our community of practice. Because of that information, higher ed leaders and advising teams can make more informed decisions about how to serve the increasingly diverse needs of students on campus.

What could you do differently if you knew exactly what works best for your students?

As your programs, policies, and students change – you need to make sure you’re adjusting and refining your approach. To get more students across the stage, we can’t just keep doing what probably worked before. We all must lean in and look at what’s working for whom or risk stagnating outcomes for our institution and students.

**Conclusion**

You work daily to improve student success. It’s hard work, but it’s noble work. The good news overall, advising has an impact.

But, we can’t assume what makes a difference for one student on one campus will have the same impact on another student somewhere else. Your advising teams must move past a one-size-fits-all approach. Instead, look more closely at ways to deliver proactive, personalized support that meets various student groups where they are.

There is a path to improve outcomes while alleviating advisors’ unrealistic capacity demands. And it’s found in some of the proven tips and new techniques we shared here. Knowing what works for your students on your campus does. When we look closer, it’s clear that improving visibility across campus, helping your teams organize around that knowledge, and prioritizing the student experience makes all the difference.

---

**About Civitas Learning:**

Civitas Learning empowers colleges and universities to achieve transformative levels of student success and help reshape higher education for decades to come. Our platform brings institutional data for a clearer picture of each student and situation, equipping leaders and teams to take data-driven action and lead with a new purpose to impact student and institutional success.

**Citations:**

2. *State of Students Report*. Center for Generational Kinetics and Civitas Learning, 2018
5. *State of Students Report*. Center for Generational Kinetics and Civitas Learning, 2018

---

Advising & Student Support Playbook

www.civitaslearning.com