Targeted Campaigns 101
Foster Student Success through Targeted Outreach Strategies
Your Presenter

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Housekeeping Items

Please keep audio muted during the presentation to avoid background noise.

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What Is a Targeted Campaign?

How It Works: Five Steps

Successful Campaigns from Around the Collaborative

COVID19 Targeted Campaign Recommendations

Available Resources
What Is a Targeted Campaign?

Proactive Intervention Focused on a Subpopulation with a Shared Need

**Traditional, Passive Advising**

Students Receiving **General** Support

Students With **Risk Factor**

**Proactive & Strategic Advising**

Students Receiving **Tailored** Support

Students With **Risk Factor**
1. What Is a Targeted Campaign?

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Step 1: Narrow Your Focus

Choose specific campaign objectives that align with personal goals for your student caseload or goals of your department/school

Find areas for opportunity by combining:
✓ **first-hand experience**
✓ **institutional student success data**

From there, define your campaign by choosing a handful of specific campaign objectives.

**Example: “Murky Middle” Finance Majors**

✓ **First person experience:** Students in the Finance major often realize too late that they need extra help to pass their advanced math courses.

✓ **Institutional data:** Finance majors with 2.0-3.0 GPAs drop out at a higher rate than students in other majors.

**Target group:** Mid-career Finance majors with 2.0-3.0 GPAs with high risk predictions and fewer than 90 earned credits

**Objectives:**

1. Contact all identified students to encourage them to initiate an advising session
2. Schedule an advising session with 75% of identified students
3. Connect 50% of students with tutoring or other resources to work on their academic standing
4. Reduce these students’ risk of dropping out
Choose How You Will Measure Success

Select 3-6 Metrics Encompassing Both Short- and Long-term Outcomes

What is the initial **action** you will take to kick off the campaign?

What do you hope students immediately **do in response to** your outreach?

What **behavior or action** do students need to take as a result of the campaign?

What is the **impact** you hope to see with this group in one term or one year?

**Examples:**
- # of emails
- # of follow-up calls

**Examples:**
- % response rate
- # of appts scheduled

**Examples:**
- % declaring major
- % attending tutoring

**Examples:**
- # improving GPA or avg. GPA improvement
- # obtaining scholarship

- Full list of common metrics on pages 3-4 of the Measuring Effectiveness Toolkit
Chat Discussion

What **populations** are you most concerned about during the COVID19 response?

What **interventions/support** could you provide this population?
Chat Discussion

PollEv.com/brelindajohn160
Step 2: Identify and Generate Your List

Pinpointing Students You Want to Target for Intervention

After setting an objective, identify your target list of students by selecting the parameters that will define this population.

1. **Select**
   Determine which filters to apply to best “capture” the desired student population

2. **Generate**
   Use the Advanced Search to generate a list of students who will be part of the targeted outreach

3. **Save**
   Save your list as a “Watch List” to monitor throughout the length of your campaign

4. **Export**
   Export your list as an .XLS for additional tracking and analysis
Advanced Search Filters

Using the Platform to Generate Lists

Common Filters for Campaigns

- Grade or enrollment in a course
- Term GPA
- Cumulative GPA
- Advisor
- College/major/concentration
- Credit completion %
- Credits earned
- Term enrollment
- Transfer Student
- Risk level
- Missed Success Markers

Can’t generate your selected population with just the filters?

Use the ‘Upload a List’ Function

- Put all student IDs in column 1 of an Excel file
- Save it as a .csv
- Upload the list by going to ‘Watch Lists’
- Save as new or existing Watch List

Check that your parameters generate a manageable number of students. We recommend 30 to 75 students.
Step 3: Contact Targeted Students

Defining an Effective Outreach Strategy

Now that you have the students, the next step is to determine how you will reach out to them to meet your objectives.

1. Create a timeline
   How frequently and through which channels will you reach out to targeted students?

2. Plan follow-up steps
   Map out steps you will take to follow-up with these students if they do not respond

3. Write your outreach
   Prepare the messages you want to communicate and resources you want to provide at each interaction

4. Share and collaborate
   Consider sharing your strategies with others on campus—no need to reinvent the wheel!
Outreach Strategy

Suggested Outreach Frequency

In successful previous campaigns, advisors outreached to students 3 to 5 times over a one or two month period of the semester.

**Example Timeline**

<table>
<thead>
<tr>
<th>Week</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Targeted Email #1</td>
<td>Targeted Email #2</td>
<td>Phone Call</td>
<td>Advising Sessions</td>
</tr>
</tbody>
</table>
Audit and Improve Email Content to Ensure Students Respond

What’s inside?

- Summary of email best practices
- Communications audit worksheet
- Email templates for inspiration

Download by clicking here or requesting from your Strategic Leader

You can also access on-demand webinars about our student communications research
Step 4: Intervene and Direct Students

Connecting Students With The Right Resources

After the initial outreach and appointment, it’s up to you to guide the student down the best path. Make sure you document this for your campaign tracking!

1. Diagnose
   What issues is this student facing? The answer might be “none,” and that’s OK.

2. Act
   It’s now time for students to take the next step based on your interactions.

3. Direct
   After diagnosis, direct that student towards the appropriate action.

4. Document
   Relevant information should be documented for reference.
Step 5: Track Outcomes and Follow Up as Needed

Quantifying The Success Of Your Efforts

After intervention, follow up with students to confirm whether they took action, and what the outcome was.

1. Close the Loop
   Seek to reestablish contact with the student within two weeks of your meeting.

2. Record Your Results
   Document results either in a note or spreadsheet on an ongoing basis.

3. Analyze
   Based on the metrics you set, did you achieve your goal? If not, how close were you? What will you change next time?

4. Share
   Share positive results and lessons learned with other advisors in your office, the dean of your department, etc.
In Summary: How It Works

Process for Running Targeted Campaigns with Navigate

Focus in on one of your institution’s areas of greatest opportunity

Identify
Create lists of students with target attributes to define your target population

Contact
Send proactive outreach to students to establish contact

Intervene
Meet with students and provide tailored advising support to this population’s needs

Follow Up
Follow up on student progress and track campaign outcomes
Platform Demo

Launching Targeted Campaigns
1. What Is a Targeted Campaign?
2. How It Works: Five Steps
3. Successful Campaigns from Around the Collaborative
4. COVID19 Targeted Campaign Recommendations
5. Available Resources
Virginia Commonwealth University Case Study

Challenge: VCU has steadily improved its first-year retention rate in recent years, but wanted to focus on increasing four- and six-year graduation rates. To meet this goal, decentralized advisors needed a new, shared approach to identifying and addressing the needs of less obviously at-risk populations, particularly after the first year.

Encouraging Proactive Interventions with Unique Populations of At-Risk Students

<table>
<thead>
<tr>
<th>Platform Training</th>
<th>Campaign Design</th>
<th>Campus Leadership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultant and SSC Leaders teach strategic platform usage and connect campaign development to institutional goals</td>
<td>SSC Campaign Toolkit supports standardized approach while encouraging advisor creativity</td>
<td>Clear expectations, focus, and support result in 12 campaigns run by 40+ advisors in 7 programs across the University</td>
</tr>
</tbody>
</table>

Virginia Commonwealth University
- Richmond, VA
- 23,700 Undergraduates
- Classification: Very High Research
- 86% Retention Rate
- 59% Graduation Rate
- Joined SSC in 2013
# Generating Diverse Campaigns and Outcomes

## Campaigns Impact Key Micro Metrics on the Path to Persistence

<table>
<thead>
<tr>
<th>Campaign Type</th>
<th>Population &amp; Intervention</th>
<th>Student Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Academic Performance Improvement</td>
<td>Connect Business School students on probation to needed support resources</td>
<td>34% Percentage of students who raised GPA above 2.0</td>
</tr>
<tr>
<td>2 Major Selection</td>
<td>Assist high-risk Undeclared students with major planning and declaration</td>
<td>19 Additional students enrolled in Education and Career Planning course</td>
</tr>
<tr>
<td>3 Transfer Persistence</td>
<td>Facilitate academic planning for low-GPA transfer Biology students</td>
<td>8% Eight percentage points higher persistence than previous year cohort</td>
</tr>
<tr>
<td>4 Accelerating Degree Completion</td>
<td>Assist underperforming psychology students with course sequencing</td>
<td>25 Upper-class students enrolled in gatekeeper statistics course</td>
</tr>
<tr>
<td>5 Graduation Application</td>
<td>Remind qualified seniors to apply for graduation</td>
<td>19% Increase in graduation candidates compared to spring 2014</td>
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</tbody>
</table>
Graduation Rates Crush Previous Historical Record

Campus Wide Efforts Result in Campus Wide Gains

905
Students contacted as part of the “Rising Senior Campaign”

7% Increase in four-year graduation rate for 2012 cohort

505
Students applied to graduate after campaign intervention

3% Increase in six-year graduation rate for 2010 cohort

83% of students in School of Engineering and Computer Science responded to outreach

100% of targeted students in School of Health Sciences applied to graduate in upcoming terms

School of Nursing
• Adjusted graduation plans, dependent on success in certain courses
• Frequent stop-out contact

School of Business Administration
• Career Services referrals and support
• Multiple emails sent to each student

School of Education and Human Services
• Majority established plans for graduation
• Focused on financial barriers and course availability

School of Engineering and Computer Science
• 152 phone calls in total for students to ask questions and get personalized advice
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4. COVID-19 Targeted Campaign Recommendations

5. Available Resources
1. Re-Enrollment Campaign

2. CUSTOMS Incoming Student Online Campaigns

3. College or Program Specific Opportunities
Chat Discussion

How do you envision using targeted campaigns within your scope?

What additional information or support do you need to feel confident launching these campaigns?
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61 Campaign Ideas
Target Your Advising Efforts Across the Year

A targeted advising campaign is an effort of focused, proactive outreach to a population of students in need of a specific intervention or action. Over the past year, academic advisors in the Student Success Collaborative have used the SSC platform to conduct a wide range of campaigns—seeing impressive results with students. Below is a list of 61 campaign ideas from advisors across the country.

**STUDENT POPULATIONS**

- **Immediate Performance Concern**
  - These students are currently taking courses, missing milestones, or struggling to remain academically eligible. They are at-risk in the most traditional sense and likely to persist without immediate support.

- **Future Performance Concern**
  - Although these students appear to be performing adequately, SSC data suggests that they are likely to struggle or encounter obstacles in future terms. Intervening with these students now will help prevent trouble down the road.

- **Program Choice Concern**
  - These students are enrolled in a major that is support for their needs. Based on their academic performance, they are likely to struggle or encounter obstacles in future terms. Intervening with these students now will help prevent trouble down the road.

- **Student Experience Concern**
  - Students in this population may be performing well academically, but are missing key resources or struggling with other non-academic issues. Intervening with these students now will help prevent trouble down the road.

**ADVISOR ACTIONS**

- Inform
- Support or connect with resources
- Collaborate to change major in the right term
- Reenroll
- Exercise judgment
- Comment with opportunity

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**Start of Term**

1. Enrolling freshmen students who are high risk based on prior enrollment data
2. Students struggling in a specific course required for graduation (identified through early alert)
3. Students with GPA below 1.5
4. Students who are in probation or have not attended a major or career advising session
5. Sophomores and juniors on academic probation from the previous term

**Registration**

13. Students who have not created a personalized degree plan
14. Students interested in health careers, but not likely to meet pre-health requirements
15. Undecided junior transfer students
16. Students who have met the credit threshold to declare a major

**End of Term**

20. Students with low credit completion rates for the term (e.g., less than 75%)
21. First-year probation students eligible for academic recovery program
22. Students who have not declared a major on the first time
23. Students who have not completed required courses in time to graduate
24. Students in need of a degree planning session to graduate on time
25. Students in need of a degree completion planning session to graduate on time
26. Students who have not yet applied for graduation
27. Students with low credit completion rates for the term

**Anytime**

37. Students who are at risk in a challenging or elective major
38. Students who are in academic probation and have missed key resources or struggling with other non-academic issues. Intervening with these students now will help prevent trouble down the road.
39. Students who are not majoring in a major that is the right term
40. Students who are not majoring in a major that is the right term
41. Students eligible for academic support program or academic warning
42. Students at risk of losing a scholarship for academic reasons
43. Students at risk of losing their financial aid
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61. Students at risk of losing their financial aid

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**Let’s Get Started!**

Fill in your targeted campaigns in my ERP system for a step-by-step guide, recommended campaigns in my ERP, and additional resources to conduct your campaign, visit eab.com/SSCCampaignIdeas.
Campaign Resources

61 Campaign Ideas

Campaign Calendar

Designing and Implementing Targeted Advising Campaigns
Toolkit for Faculty and Staff Academic Advisors

Measuring Campaign Effectiveness
Supplement to the Targeted Advising Campaigns Toolkit

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