



Education
Advisory
Board

Academic Affairs Forum

Promoting Student Self-Direction

Critical Policies and Innovative Technologies
for Smarter Academic Navigation

A Bridge Too Far?

Not Just Practical, But Principled Concerns About Intrusive Advising



The Enrollment Counselor

“Upon calling WGU I was assigned an enrollment counselor who would take me through the process of applying... He streamlined the process for me and tracked my progress. We had scheduled conversations through the entire process.”

The Personal Mentor

“At WGU your mentor’s job is to assist you in making viable choices and achieving your goals. They are also responsible for tracking your progress. Each week I have a scheduled phone call with my mentor during which we set my weekly goals. Not semester goals, weekly goals.”

Western Governors University Student

Quantity and Quality



Will “Throughput” Gains Undermine the Value of Education?

The Allure of the “No Frills” University as a Completion Panacea



Streamlined Curriculum



Accelerated Programs



Personal Success Coaches



Inexpensive



...But at What Cost?

Comprehensiveness and Choice



Rigor and Exploration



Student Responsibility



Co/Extra-Curricular Options



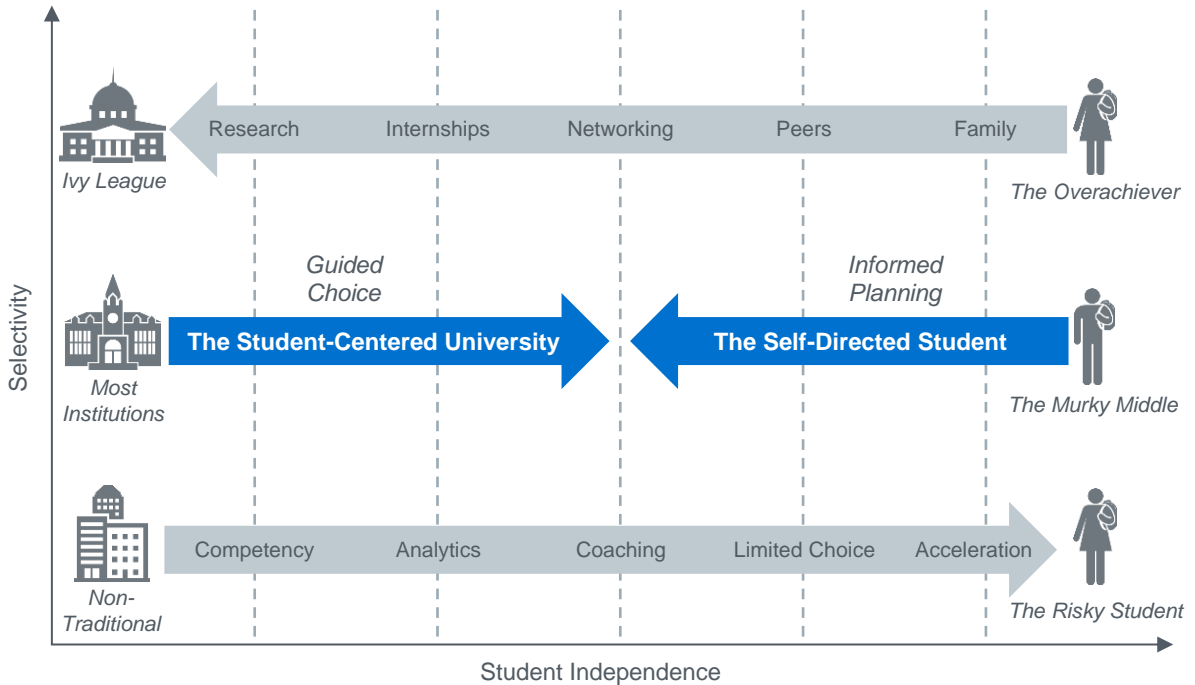
“

It seems to me that the completion engine has hurtled down the track with a lot of states putting in financial rewards and penalties for speeding up completion and cracking down on excess credits. Then there’s the quality engine, still struggling to get out of the shed.

- Carol Geary Schneider, President, AAC&U

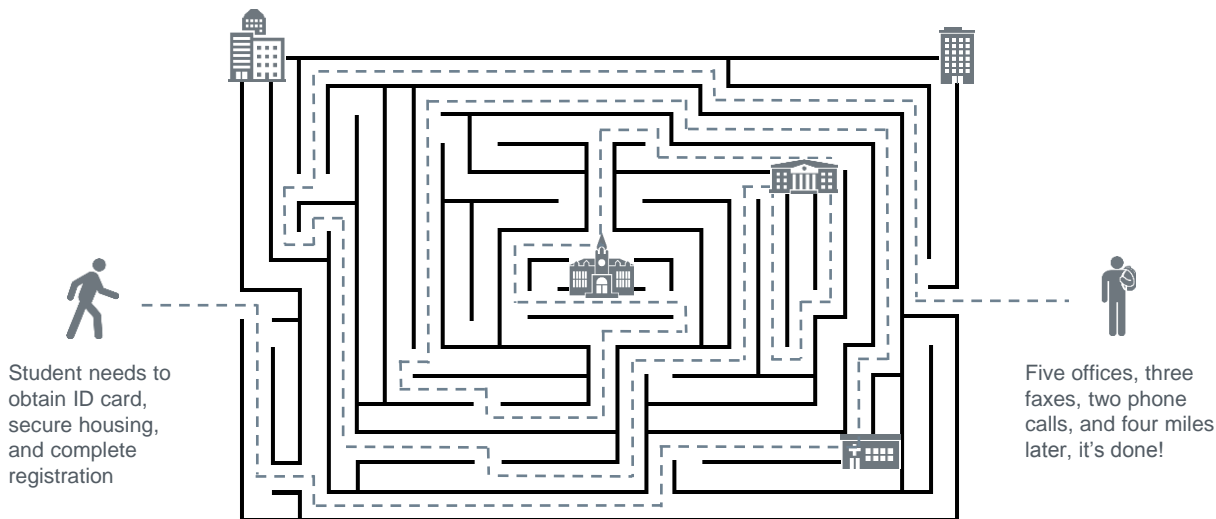
Meeting Students Halfway

Navigating Between Extremes in Student Success



Only the Strong Survive

Labyrinthine Service Structure an Unnecessary Obstacle for Students



“Because there are no one-stop registration centers and because both academic units and central support service units want to regulate the registration process, **an unfortunate student can walk several miles and cross the Mississippi River numerous times to complete registration**—assuming everything goes right.”

- Robert B. Kvavik and Michael N. Handberg, “Transforming Student Services,” *Educause Quarterly*



The Slippery Slope to Attrition

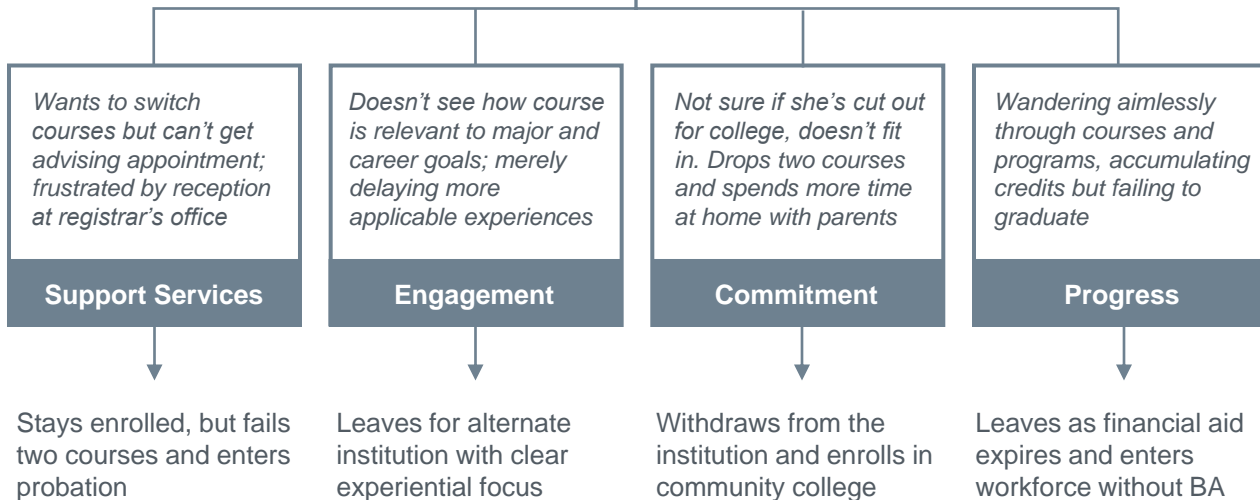
Seemingly Small Choices Can Derail Long-Term Plans



Student doing poorly in several classes this term, doesn't feel engaged



What went wrong, and when?





Promoting Student Self-Direction

Critical Policies and Innovative Technologies for Smarter Academic Navigation

How do I help students make better decisions without massive new investments in advising?

How do I reduce the likelihood and costs of failure without sacrificing rigor?

1

Scaling Student Self Service



- Actionable Checklists
- Service Tutorials
- Personalized Alerts
- Engagement Feed

2

Enabling Integrated Planning



- Configurable Degree Maps
- Co-Curricular Timelines
- Experiential Planning Policies

3

Sustaining Academic Momentum



- Preemptive Resilience Exercise
- Course Load Incentives
- Multi-term Registration
- Withdrawal Survey Modules

4

Reducing Deviation Costs



- Withdrawal Redirect Courses
- Macro Majors
- Last Mile Initiatives

User-Centric Design

A Full Experience

Curricular Guardrails

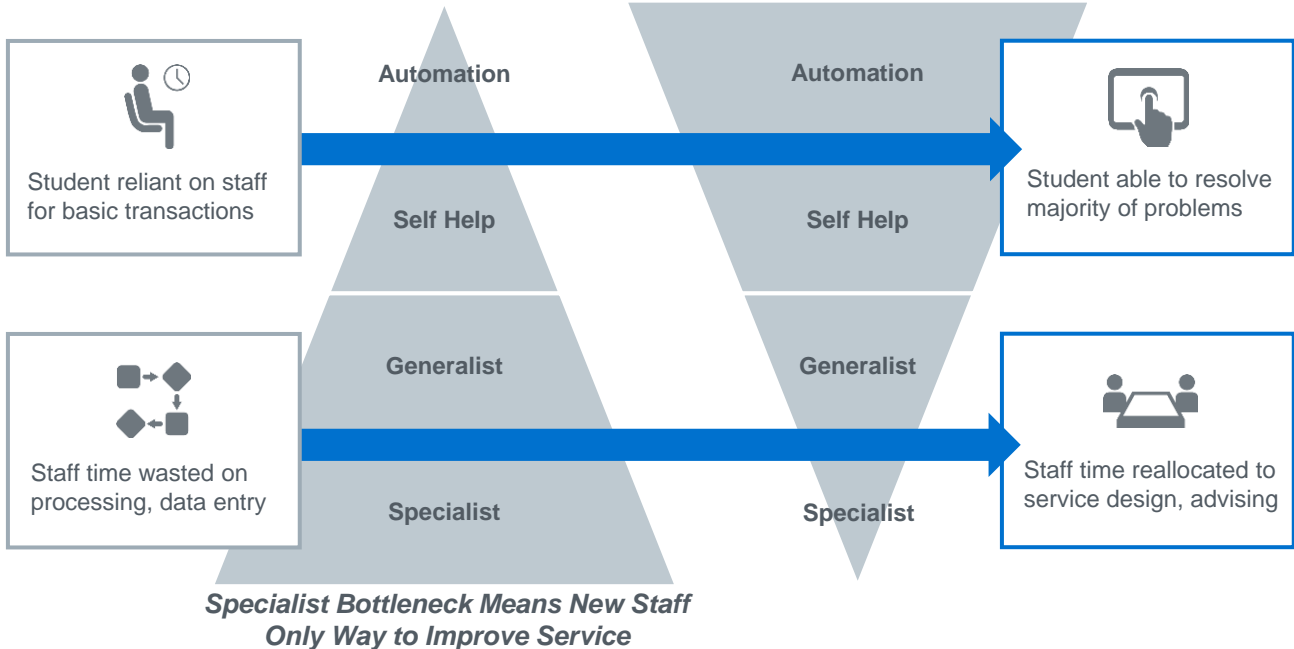
Student Safety Net



Flipping the Service Model

Traditional Support Structure Inefficient, Expensive, and Impersonal

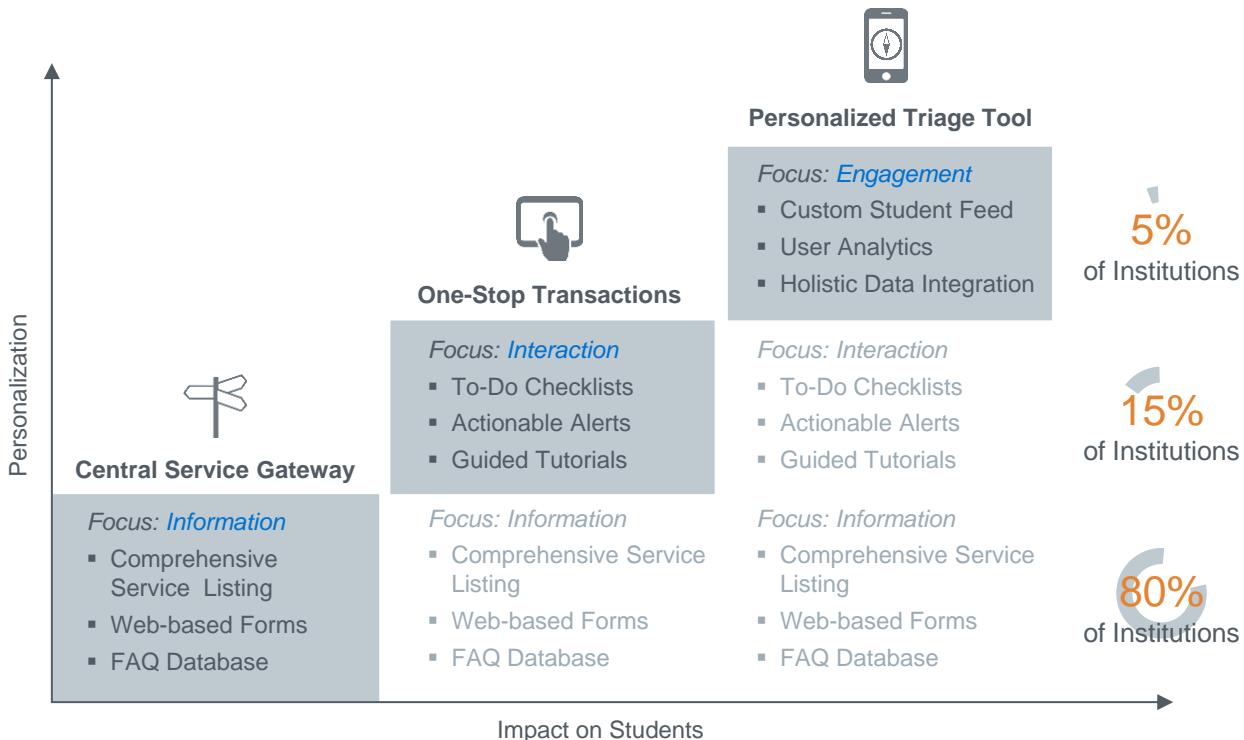
*Removing Logistical Barriers to Self-Support
Allows Staff to Reallocate Time*





Building Tomorrow's Self-Service Portal

From Information Resource to Engagement Application



Step One: The Central Service Gateway

One-Stop Redesign Eliminates Information Barrier



Upcoming deadlines

Academic dates & deadlines

- Monday June 10**
Summer financial aid disbursement begins for all undergraduate, graduate, and pharmacy students
- Tuesday June 11**
Last day to apply for undergraduate summer term graduation
- Friday June 14**
Last day of instruction for May session
- Monday June 17**
Summer 10-week, 8-week, 6-week, and first 4-week sessions begin

Registration

Register online

Finances

Costs, tuition, & fees
Financial aid
Your student account
Pay the University
Money management
Educational tax benefits
Scams & fraud

Grades & transcripts

Understanding grades
Unofficial transcripts
Official transcripts
Certification letters
Student records privacy

Degree planning

Explore degree options
Advising & counseling
Graduation Planner
Graduate in four years
Academic support & tutoring
Changing college or major
LE requirements
Graduation

U resources

New to the U
Campus life
Computing & technology
Employment & career
Getting around campus
U policies & administration
Libraries
Bookstores

"Just in time" news

Direct Loan changes

Interest rates and loan fees on Direct Loans are scheduled to increase on July 1.

Interest rates: 3.4% to 6.8%

Loan fees for Direct Loans: 1.0% to 1.051%

Loan fees for Direct PLUS loans: 4.0% to 4.204%

In order to receive the lower interest and loan fee rates, you must respond to your **sFAAN** by **June 15** and complete your **promissory note** by **June 28**.

Direct Loan changes

Summer 2013 aid

Apply for summer graduation

Transcript fee increase

May/summer tuition rates

Fully electronic forms

Quick Links

Forms online

Registration tools

Class Schedule
Class Search
Course Guide
University Catalogs

Enrollment Surveys
Register
When to register
Class section search
Health plan coverage

Finance tools

Direct Deposit
Financial Aid Search
Pay online: student parent/guest
Student account
Scholarship Search

Student records tools

APAS report
Grades
Graduation Planner
Holds
Parent/guest access
Personal information
Unofficial transcript
Order transcript

Calendars

Academic calendar
Final exams
Cancel/add & deadlines
Payment due dates

All pages housed on One-Stop site; not just links to F2F services

Comprehensive categories without "scope creep"

FAQ knowledge base

Special for: [New students](#) | [Parents & guests](#) | [Veterans](#) | [Non-degree students](#) | [Former students](#) | [Graduate students](#)



Mobile-friendly

[View mobile version](#)



Core Components of a Progressive Portal

Maximizing Impact and Adoption Through Focus on Student Action

- 1 Actionable Checklists
- 2 Service Tutorials
- 3 Personalized Alerts
- 4 Engagement Feed

Self-Service Hub Focused on Process Navigation

1

ABC University
My Portal

- ✓ Complete Student Health Form **Form**
- ✓ Take English Placement Exam **Done**
- ✓ Obtain ABC ID Card **Done**

Student Health Form

Name _____
Date of Birth ___ / ___ / ___
Vaccinations _____
Emergency Contact _____

Navigating Student Health Services

- Process Guide
- Video Tutorial
- Live Chat

2

Quick Links

Registration	Course Schedule
Financial Aid	Student Activities
Bursar	Library

Personalized Action Items Pushed to Students

3

ABC University
My Alerts

- ! **Payment Past Due**
- ? **Spring Registration**
- ✓ **Required Form Submitted**

4

My University Feed

Psych 250 – Week 7

- Read Ch. 7-8
- Interim project updates
- Midterm next week!



One Step at a Time

Simplifying Action Items for Defined Student Segments

Tailored Checklists Focus Attention on Relevant Tasks



> My Status Alerts 3 / 3

v My Checklists

Fall 2014 Freshman 2 / 10

Fall 2014 Transfer 2 / 2

> My Systems

Blackboard

Library

Gmail

Outlook

MyAdvisor

A+ Tutoring

Clear Links to Actions and Further Information

Create Login ID

** Required*

Apply for Financial Aid

** Optional*

[Info](#) [Apply](#) [Status](#)

Pay Admissions Deposit

** Required*

[Pay Deposit](#)

Apply for Housing

** Optional*

[Info](#) [Apply](#)

Simple Web Forms Enable Instant Resolution

2014 Housing Application

Name

Address

When forms or documents must be physically delivered...

- Checklist status is updated once received
- Processing time listed in task description



Guiding Students Through Complexity

Accessible Tutorials Reduce Reliance on One-on-One Assistance



UC Santa Barbara's < 1 Minute Video Guides

#1 Google Result for "FAFSA Steps"



Financial Aid TV's Customizable Library

47,000+ Views in First Year at Rutgers U.



From Generic to Personal

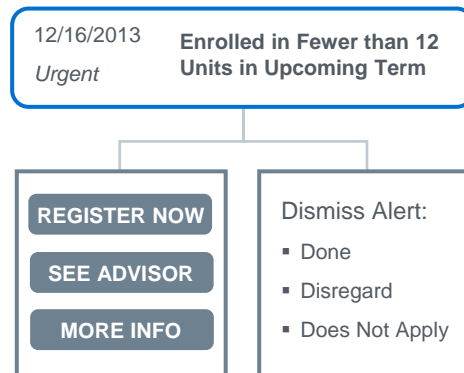
“Action Center” Highlights Student-Specific Issues and Opportunities



Student Data Powers Three-Tier Alert System

	Urgent	Attention	Eligible
<i>Enrollment</i>	Zero Courses Next Term	Early Enrollment Advising	Honors Programs
<i>Academic Standing</i>	Probation / Mandatory Remediation	Review Impact of Low GPA	Scholarships Available
<i>Degree Progress</i>	Missing Requirement > 60 credits	Missing Requirement < 30 credits	Peer Tutor
<i>Attendance</i>	Missed Multiple Classes	Missed One Class	RA Position

Each Alert Enables and Requires Action



98.5%

Share of students that have viewed alerts

171,000

Unique actions taken since 2011

Top Principles for Notification Design



Alert Criteria Prevent Oversaturation and Promote Impact

Impact on Success

- Addresses student persistence
- Geared toward specific population
- Can be categorized by type / urgency

Reserved for critical issues

Concision

- Header less than 50 characters
- Fewer than 5 explanatory sentences
- Scannable, simple content

Short and to the point



Call to Action

- Requires student to take an action
- Links directly to relevant next step
- Links directly to more information

Pathway to resolution



Toolkit: Portal Design Principles

- Alert purpose and approach
- Rules for action steps and descriptions





A Data-Driven Lesson in User-Centered Design

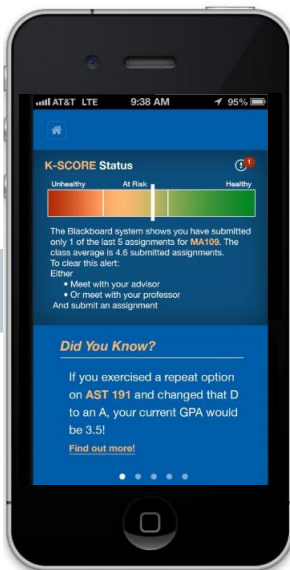
Innovative Mobile App Reflects and Inflects Holistic Student Experience



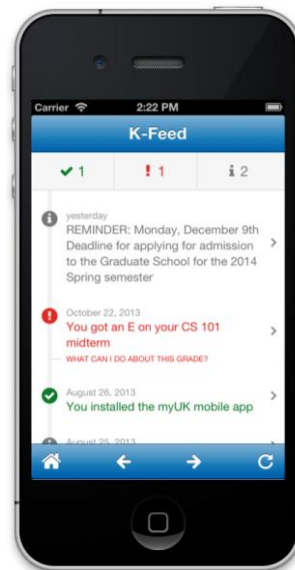
From a Score...



To a Health Indicator...



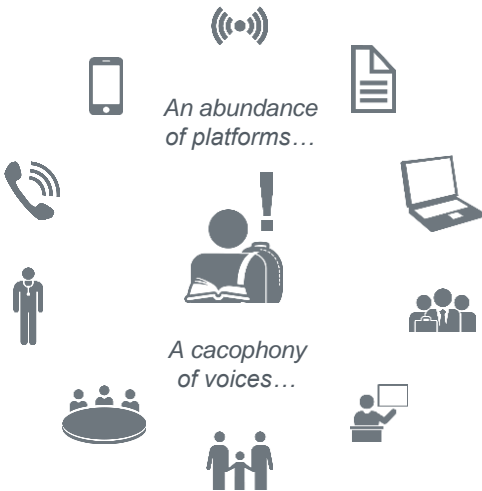
...To a Personalized Feed



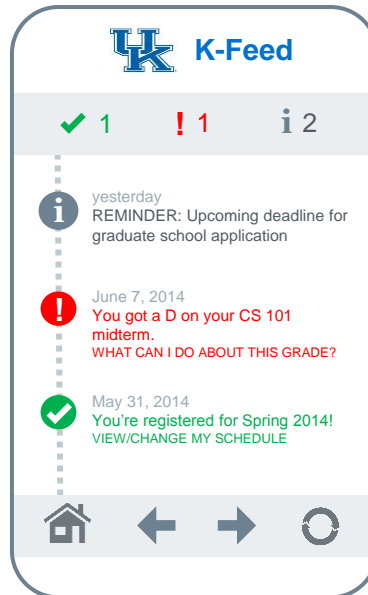
Calibrating Messages With Analytics

Microtargeting Enables Bigger Impact and Deeper Analysis

Easy to Get Lost in Sea of Messages from Administration, Clubs, Friends, and Family



Analytics Behind K-Feed Enable Personalization and Ensure Relevance



Flexible Platform

Campus units opt in; not an administrative mouthpiece

Smart Curation

IT/Analytics group can tailor feed according to usage metrics

Micro-Surveys

Institution and feed gain valuable data from targeted user input

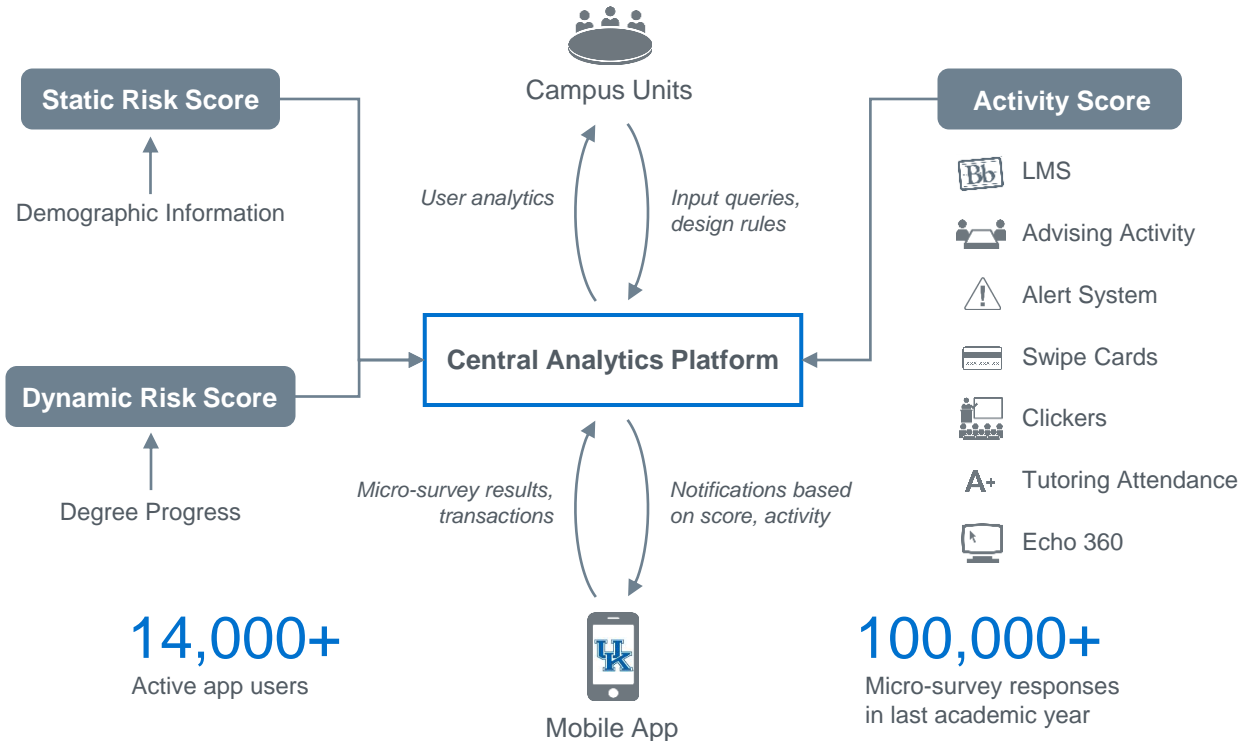
Parent Opt-In*

Students can allow parents to view feed to aid awareness

* Planned for late 2014

Behind the Scenes

Timely, Personalized Feedback Requires Advanced Infrastructure



Summary – Scaling Student Self-Service



- 1 | Migrate as many paper-based processes and transactions to the web as is permissible and possible at your institution, to help both on- and off-campus students interact more easily with support services.
- 2 | Online support services and transactions should be integrated into a central student portal optimized for multiple platforms, preventing a “virtual runaround” that mirrors the physical separation of many campus support offices.
- 3 | Develop curated, step-by-step support guides tailored to student segments and complex processes to reduce student dependence on staff for basic transactional support.
- 4 | Allow students to take immediate action to address holds, restrictions, and other problems communicated through portal alert systems by providing clear action links.
- 5 | Enable real-time, personalized interventions and recommendations through the use of a central analytics platform combining student records, academic performance data, engagement activity, and advising information.



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- Macro Majors
- Last Mile Initiatives

User-Centric Design

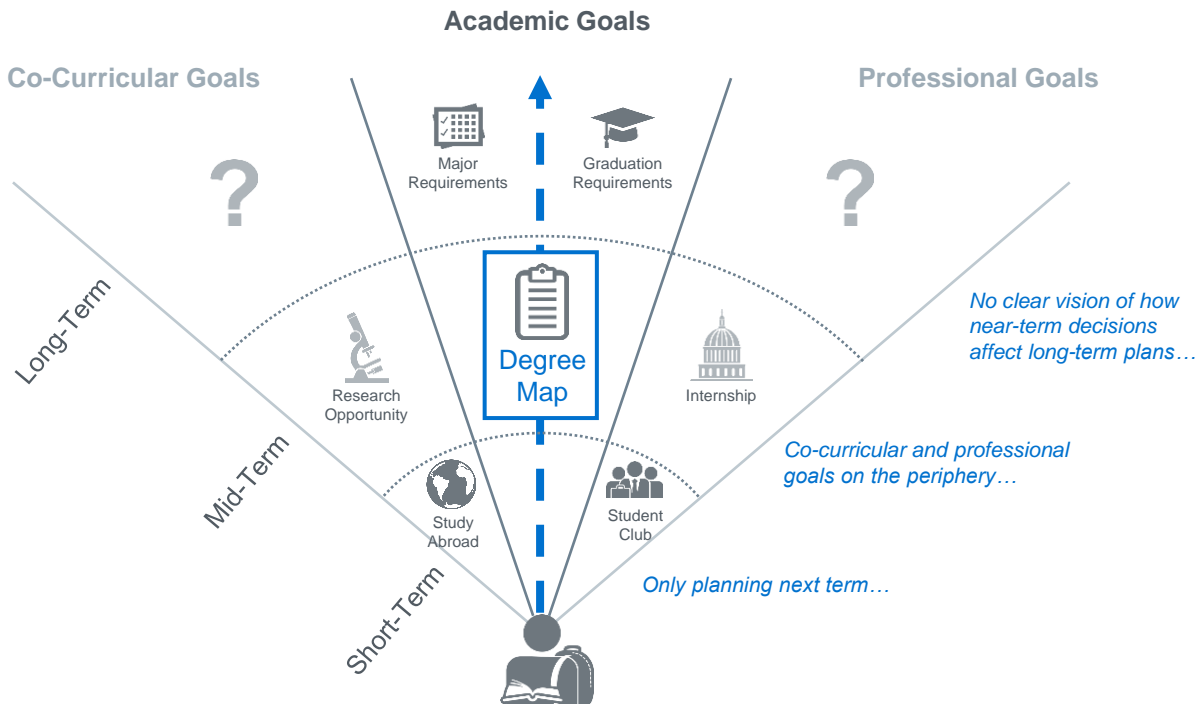
A Full Experience

Curricular Guardrails

Student Safety Net

Not All According to Plan

Focus on Near-Term Academic Navigation Shortchanges Experience





The Next Generation

Today's Degree Mapping Tools Better Track Actual Student Paths

Major: Anthropology	
Fall 1	Fall 3
Spring 1	Spring 3
Fall 2	Fall 4
Spring 2	Spring 4



Meaningful Milestones

- **Uses historical data** to identify courses and grade thresholds most correlated with success
- **Incorporates critical courses and grade thresholds** into degree maps



Scenario Planning

- Allows students to **model future paths to degree**, incorporating coursework and co-curricular options
- **Accounts for courses completed and future availability** to alert students when a proposed plan does not fulfill requirements



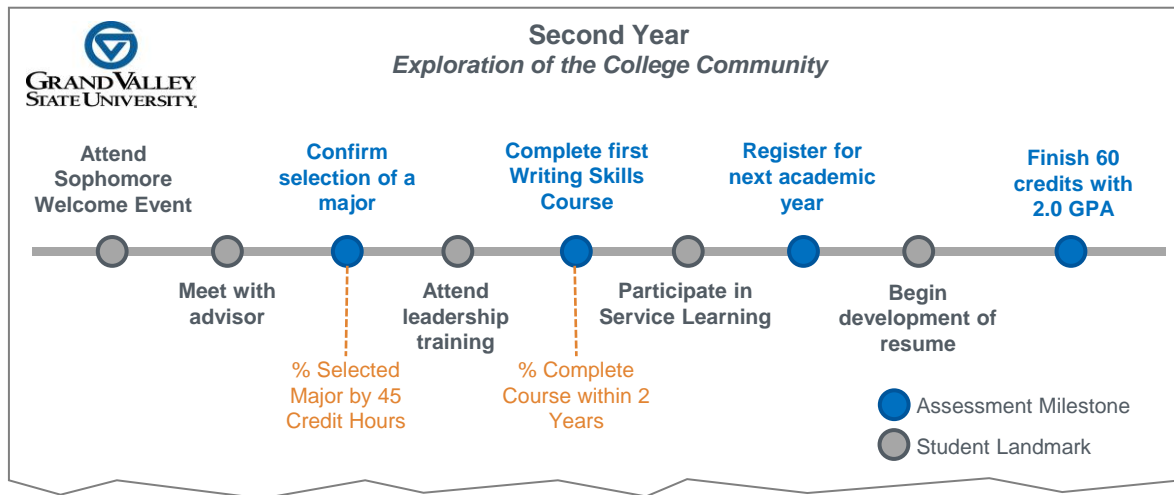
Monitoring Capability

- **Tracks student progress** against proposed degree plan
- **Responds to deviation** from the major plan with messages or requirements based on the significance of the divergence



Outside the Classroom Walls

GVSU Blueprint for Student Success Tracks Experiential Milestones



Comprehensive Inventory

Includes academic and co-curricular roadmap for each year in student's career

High Visibility

Introduced at student and parent orientations, used by advising centers, published in student guides

Joint Accountability

Shared benchmarks for tracking completion of landmarks by students and institution



The Right Activities for Me

Major-Specific Co-Curricular Maps Provide Tailored Recommendations

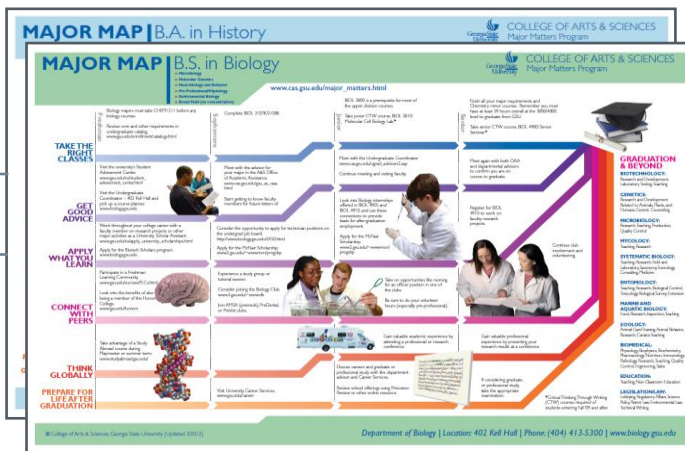
Unique to Major

Individual map for each of the 30 Arts and Sciences majors



Relevant Career Paths

Lists relevant career paths open to students in particular major



Early Planning Prompts

Co-curricular prompts begin in first year

Co-curricular Opportunities

Suggests on- and off-campus activities alongside curriculum



Getting Guidance In Front of Students

Four Ways to Expand Experiential Conversation and Participation

31



Summary – Enabling Integrated Planning



- 1 | Advising conversations and prescriptive degree maps are typically focused on near-term curricular decisions, making it difficult for students to incorporate co-curricular, experiential, and pre-professional considerations into their planning.
- 2 | To enable longer-term academic planning, invest in a configurable degree audit tool that allows students to foresee the long-term consequences of next-term decisions and alerts them when their progress deviates from their expressed plans.
- 3 | Co-curricular expectations and resources should be mapped to particular student segments, cohorts, and academic programs, so that students can easily identify relevant opportunities.
- 4 | Incorporate co-curricular planning into credit-bearing or mandatory student activities to expand the conversation beyond advising appointments and campus offices.



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Scaling Student Self Service

Enabling Integrated Planning

Sustaining Academic Momentum

Reducing Deviation Costs



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- Configurable Degree Maps
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- Experiential Planning Policies

- Preemptive Resilience Exercise
- Course Load Incentives
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- Withdrawal Survey Modules

- Withdrawal Redirect Courses
- Macro Majors
- Last Mile Initiatives

User-Centric Design

A Full Experience

Curricular Guardrails

Student Safety Net



Steering Choice Architecture in Our Favor

Behavioral Economics Comes to Higher Ed

Minor Changes in Policy and Framing Affect All Aspects of Life

Framing

“Medium” most popular coffee size, even when actual size manipulated



But Too Often, Students are “Nudged” in the Wrong Direction

Students take “full load” of 12 credits, assume they’re on track for timely graduation



The Default Option

Retirement plan enrollment climbs after “opt in” changed to “opt out”



Students only register one term at a time, and many stick to minimum course requirements



Convenience

Consumers more likely to purchase food within easy reach, at eye level



Students pick courses from huge catalog based on flawed criteria, delay graduation requirements



Burdening Bad Choice

Motorcyclists must pass extra test and prove insurance to forgo helmet



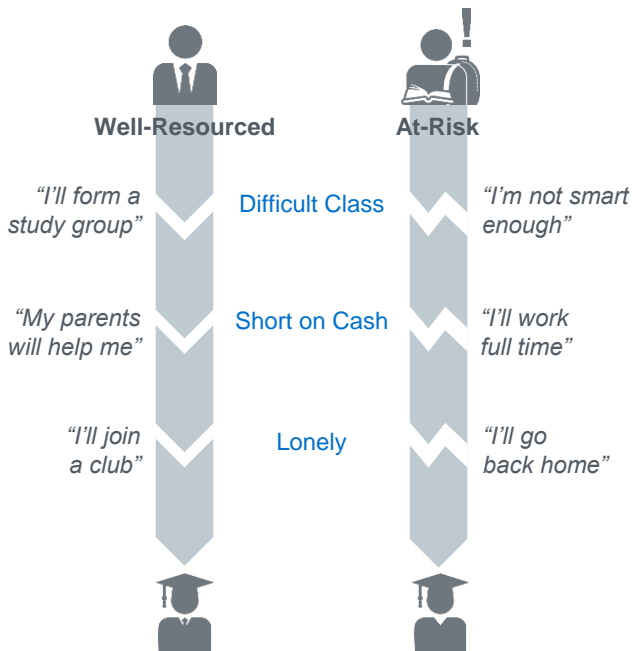
Students able to withdraw from courses, drop out, or deviate from plans with easy transaction





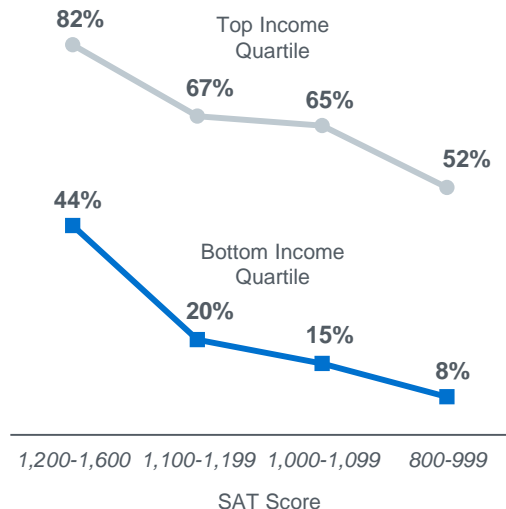
The Role of Resilience

At-Risk Students Often One Obstacle Away from Attrition



The Achievement Gap

Chance of Earning a Four-Year Degree by Age 24





Building a “Belonging” Mindset

UT Austin’s Innovative Psychosocial Intervention for Risky Students

Complete online orientation activities

Read articles about the “UT Mindset”

Reflect on material to help future students



The Results

THE UNIVERSITY OF
TEXAS
AT AUSTIN

Welcome!

1. How to Register
2. Student Groups
3. Signature Course Information
4. Changing Colleges
5. Important Campus Resources
6. Vaccine Requirement
- 7. The “UT Mindset”**
8. Honor Code

Growth Mindset and Belonging Group

“The brain is malleable”

“I realized I’m not alone”



“College-level courses can be intimidating, but don’t give up! We are all a bit scared at first.”

Control Group

“Austin’s culture was surprising”

“It sure is hot here”



“College is a new experience, with a lot of big changes to adjust to. You’ll get used to it, I know I did!”

25-45 minutes

91% Participation

For “Mindset and Belonging” groups, the gap between share of disadvantaged and advantaged students completing 12+ credits in 1st term **reduced by half**

Intervention will be used for all 7,800 incoming freshmen this year

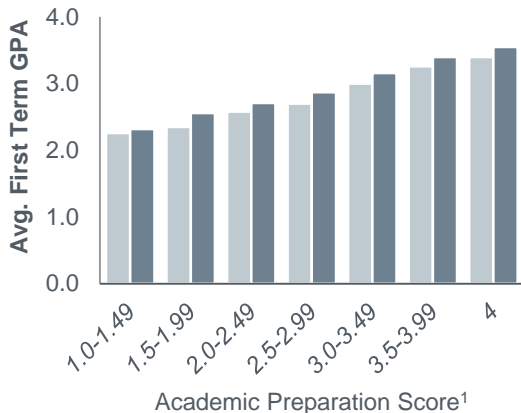
The Impact of a Full Course Load

Mounting Evidence Shows Full-Time Enrollment Boosts Success



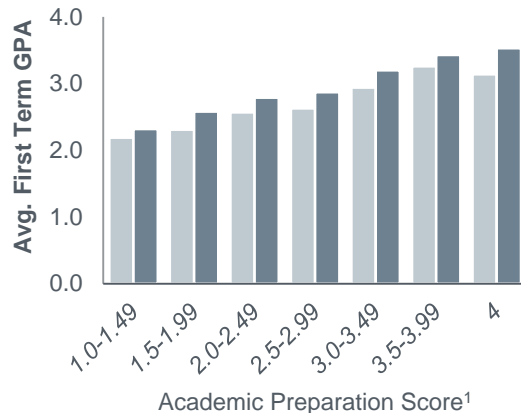
Better Results Across Spectrum of Academic Preparedness

First-Time Freshmen at U of Hawaii, 2009-2011



...Even When Isolating Pell Recipients

First-Time Freshman Pell Grant Recipients at U of Hawaii, 2009-2011



<15 Credits Taken
 ≥ 15 Credits Taken

1) Composite of SAT, ACT, HS GPA, and HS Class Rank



Encouraging Credit Accumulation

Policies and Messaging Incentivize Larger Student Course Loads



Full-time students pay for **15 credits**, rather than 12

Full-Time Definition



Sophomore standing now **defined as 30 credits**, rather than 24 credits

Class Standing



State offers **greater financial aid benefits for taking 15 credits** rather than 12 credits

Aid Incentives



\$500 incentive scholarship for students completing 30 annual credits increased mean number of credits taken by 11 percent

Credit Incentives



“Fifteen to Finish” campaign **promotes financial and academic benefits** of taking full credit load

Marketing Campaign



Course withdrawal deadline moved from **week 14 to week 9** to discourage drops motivated by final grades

Withdrawal Deadlines



Extending Registration's Reach

Multi-Term Commitment Enables and Encourages Long-Term Planning



Immediate Benefits to Students

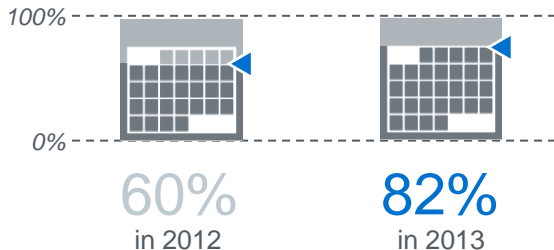
Students able to plan further ahead to accommodate complex schedules, requirements, and plans

Fall to spring retention increased 3% in first year
Departments able to forecast section demand

Academic units realize cost-efficiency gains, better aligning resources and instructor workload with enrollment

Broader Impact on Campus

Student Participation is Voluntary, But High and Growing Quickly



Technical Worries Unwarranted

“I’m kind of surprised it’s not more widespread, because it’s not technologically a challenge. I think it makes a lot of sense if you can do it. It’s good resource planning.”

- Michael V. Reilly, Executive Director
American Association of College Registrars

Source: Allie Grasgreen, "Registering Toward Completion," Inside Higher Ed, April 11, 2014; "Cleveland State University - Multi-Term Registration: Course Scheduling for Student Success," AACSU Innovations Exchange; EAB interviews and analysis.

Learning from Early Adopters

Student Adoption and Sequential Course Management Key to Success



Increasing Student Adoption



Default Registration Option

Show all available terms on main registration page to “nudge” students toward participation, and alter language to reinforce year-long planning



Targeted Email Outreach

Send monthly awareness emails throughout summer and fall to students who haven't registered for additional terms

Improving Predictive Capacity



Post-Requisite Audits

Audit prerequisite course progress at the add/drop deadline, withdrawal deadline, and end of term to reduce artificial post-requisite demand



Course Waitlists

Use waitlists to dynamically adjust section enrollment, justify additional sections, and forecast need for additional adjuncts

Giving Up Too Easily



When Students Drop or Withdraw for the Wrong Reason

Students have many reasons for choosing to withdraw from a course or the institution

Some are “good” reasons

“I’m avoiding a failing grade”

“I’m overwhelmed and worried about my grades in other courses”

Many are “bad” reasons

“I’m not earning the grade I want”

“I dislike the instructor”

“I don’t want to get up this early”

“I’ve lost interest in the material”

Sub-optimal advising practices let too many students make “bad” choices

Structure

Few institutions require an advising meeting prior to withdrawing

Quality

Some advisors simply rubber stamp all withdraw requests

Capacity

Even the best advisors cannot always dedicate adequate time to assessing all requests

Absent a meaningful conversation, many students do not understand the long-term implications of their withdrawal decision



Are You Absolutely Sure?

Penn State's Online Withdrawal Process Highlights Implications

Each Stage of Module Provides New Information and Opportunity To Back Out



- Lists impact on aid, time-to-degree, standing, grades, benefits, and enrollment status
- *For course drop*, student inputs major, reason for drop, anticipated grade
- *For withdrawal*, student selects from list of 22 academic and non-academic reasons
- Based on info provided in previous step and student degree audit
- Re-lists implications
- Requires student password to confirm final decision

40%

Students dissuaded from course drop



Incorporates Advising Into Formerly Transactional Process



Scales Intervention to Avoid Overburdening Advisors



Provides Data to Target Future Institutional Intervention

Summary – Sustaining Academic Momentum



- 1 | Students from traditionally “at-risk” populations are often more likely to leave college due to a lack of confidence or connection to the institution. By targeting these students during orientation with messages that help them envision success and engagement, institutions can begin to prevent early attrition.
- 2 | While most institutions cannot (and should not) require every student to take a full course load, every institution should ensure that students are advised to enroll in as many courses as they are able to prevent delays in graduation or loss of financial aid.
- 3 | Allowing students to register for several terms at a time strengthens their commitment to the university, helps them to plan their program further in advance, and encourages the institution to accommodate the long-term interests of its students.
- 4 | Consequential decisions like dropping a course or withdrawing from the university should not be enabled through simple registrar transactions; structure withdrawal processes in a way that informs students of potential negative consequences and allows them multiple opportunities to reconsider.



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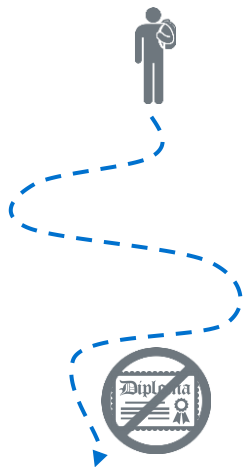
Curricular Guardrails

Student Safety Net

Falling Through the Cracks

When Planning Tools and Guardrails Fail

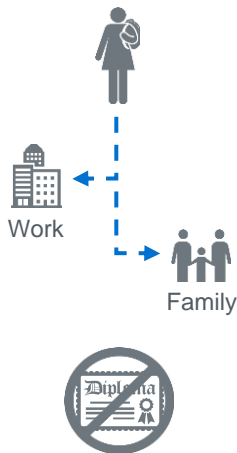
The Wanderer



...meanders though programs with no plan

Student accumulates credits without satisfying major requirements or a clear plan for completion

The Stop Out



...is waylaid by other life commitments

Personal and economic needs force student to choose other priorities over degree completion

The Locked Out



...isn't accepted into first-choice major

Student drops out or transfers to another institution after declined admission into competitive program

The Super Senior



...goes past a degree without graduating

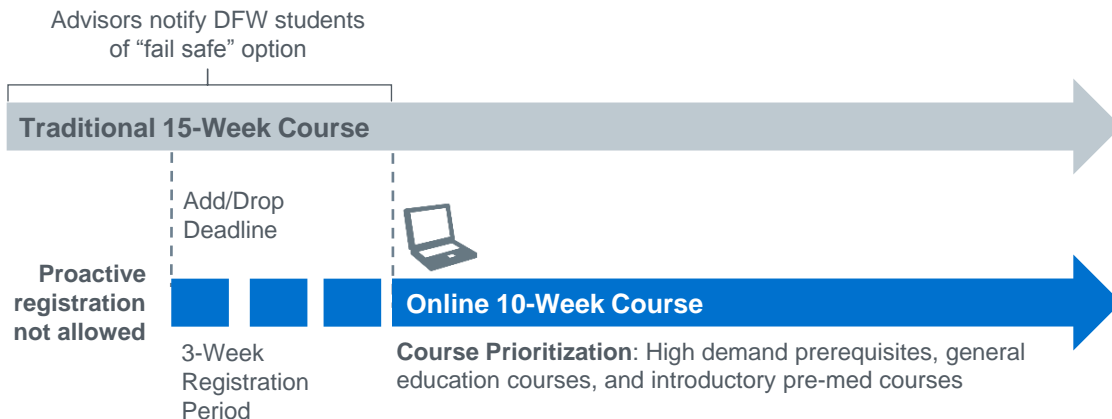
Student continues to accumulate credits without completing a graduation application



A Second Chance at a Full Course Load

Withdrawal Redirect Courses Keep Students on Track

THE UNIVERSITY OF
ALABAMA



Students avoid losing financial aid eligibility



Doesn't use valuable classroom space



Can be repurposed as "catch up" module



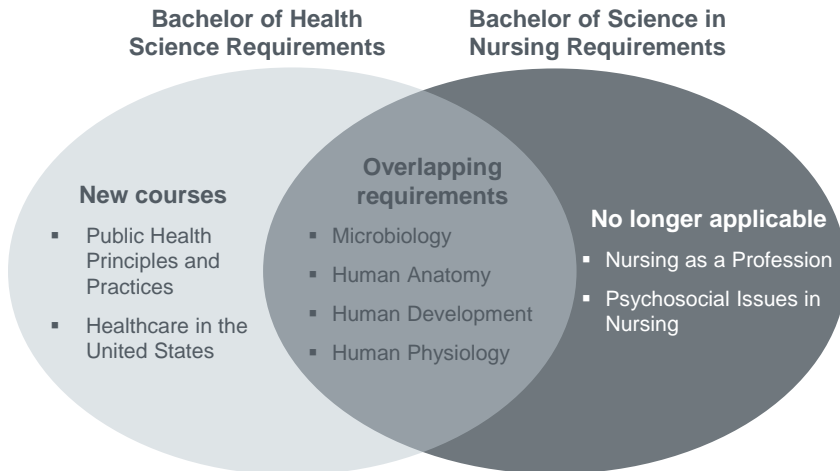
Alternate Majors Make Use of Earned Credits

The University of Missouri's Bachelor of Health Science



Not Missing a Beat

A Pre-Nursing student who switches to the Bachelor of Health Science program at the end of Year Two will have already completed **21 credits toward the new major** plus several general education courses



Surprisingly High-Demand for BHS Program

250

Anticipated Enrollment
(launched in 2006)



1,182

Actual Enrollment
(as of Spring 2014)



Overcoming the “Plan B” Stigma

Creating an Alternative That Is Truly Attractive

Academic Rigor and Respect

- 1 Perceived Prestige and Rigor**
Missouri’s BHS is built around a course of study that students view as legitimate and worthy
- 2 Top-Notch Faculty**
Recruit talented instructors to dispel student fears of settling for a second-class education
- 3 Expanded Horizons**
Introduce students to new ideas and outside of the narrow focus of their original major

Clear Connection to Careers

- 4 Industry Endorsement**
Consult employers to develop a curriculum that best prepares graduates for industry needs
- 5 Robust Career Services**
Build confidence in post-graduate employment through internships and placement programs
- 6 Potential for Future Study**
Curriculum prepares students to continue their studies in an accelerated Nursing Program

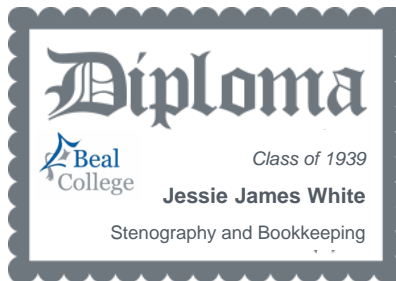
No One Left Behind



Finding, Recruiting, and Completing “Near Graduates”



“99 Year-Old Woman Graduates 75 Years Late After \$5 Transcript Fee is Paid”





Investing in the “Final Year Experience”

Proactive and Reactive Approaches to Near-Graduate Completion



Summary – Reducing Deviation Costs



- 1 | No amount of investment and planning will prevent every student failure or mistake. However, the consequences of failure are often excessively or unintentionally high at many institutions. A “safety net” approach to common difficulties can help to keep salvageable students on track for graduation.
- 2 | By creating and advertising accelerated course modules to students who drop or withdraw from a course early in the term, institutions can encourage students who might otherwise have delayed their progress or lost financial aid eligibility to maintain a full course load.
- 3 | Students who do not gain admittance into competitive majors or who remain undecided through junior year are often well-served by “macro majors,” which cluster around particular disciplines but have more flexible degree requirements.
- 4 | Proactively audit near-graduation student transcripts and intervene with off-track students in time for “expected last term” registration. Many institutions find that relatively minor interventions (one course substitution, a resolved hold, etc) can prevent senior year stop outs and push near-graduates to completion on time.

Meeting Students Halfway

Navigating Between Extremes in Student Success

