



California State University, Bakersfield Academic Advising Assessment Report

PRODUCED BY

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Statement About COVID-19

On January 20, 2020, the first confirmed case of COVID-19 was announced in the United States. As of November 9, 2020, there were more than 10 million cases of COVID-19, according to the Johns Hopkins Coronavirus Resource Center. Given the impact COVID-19 is having on the United States and the world, we will continue to be impacted by the virus, virus-related closures, and stay-at-home orders for some time to come.

One of the most impacted areas of society is the education sector, specifically higher education. In spring 2020, colleges rapidly transitioned students off-campus into a virtual learning environment, a significant and abrupt transition for most institutions.

The impact of COVID-19 is widespread throughout universities. During this academic year (2020/2021), many lessons were learned from the transition to virtual learning. The CSU system will remain in a primarily virtual mode in the Spring 2021 term. Faculty have had to navigate transitioning course work and labs to an online space, and students have had their college experience disrupted. Additionally, technology departments are now supporting students and staff remotely. Numerous students and staff also are facing security risks as they lose housing, access to food, access to the internet, and employment.

As this report is being written and shared, COVID-19 continues to be part of our collective experience. It is unknown what the long-term impact will be at California State University, Bakersfield (CSUB). Our goal with this report is to offer observations and recommendations designed to ensure excellent student experiences and support student retention.

Therefore, we believe the recommendations will remain relevant but will need to be evaluated and potentially applied differently once we've emerged from this incredibly challenging experience. This unprecedented situation needs to be acknowledged as the work continues.



Executive Summary

SUMMARY

California State University, Bakersfield (CSUB), and InsideTrack have engaged in a needs assessment project to understand the current and desired future state of academic advising. The goal is to identify opportunities to improve student graduation rates and successfully achieve the Graduation Initiative (GI) 2025 goals. The partnership also aims to unlock the potential of faculty and staff to identify opportunities to realize the campus' student success goals of lifelong learning. As of September 20, 2016, CSUB established a series of ambitious objectives under the GI 2025¹ initiative, including:

- Increasing the six-year graduation rate for first-time freshmen to 56 percent
- Increasing the four-year graduation rate for first-time freshmen to 30 percent
- Increasing the four-year graduation rate for transfer students to 74 percent
- Increasing the two-year graduation rate for transfer students to 48 percent
- Eliminating achievement gaps

To help reach these ambitious targets, CSUB enlisted InsideTrack to provide the support and consultation that will enable leadership, the Advising Leadership Team, and the academic schools to move more quickly, develop a strong academic advising plan, and generate better outcomes. Our needs assessment set out to do the following:

- Identify areas of strength
- Discover primary obstacles or shortcomings in current operations
- Develop recommendations for improvement and implementation

We intend for our recommendations to help CSUB develop sustainable, proactive student support practices that produce a high return on investment. To inform our recommendations, InsideTrack conducted focus groups and shadowed CSU B's Academic Advisors to understand the team's workflow, process, and culture. We also conducted focus groups with representatives from various departments, including Academic Advisors, Faculty Advisors, Student Services and Special Programs, Academic Deans, Department Chairs, and current students. Additionally, we completed a review of documents provided by leadership, including the university website, advising documents, and a student survey.

Through our discovery, InsideTrack uncovered many strengths. CSUB's dedication to and concern for students are evident. They are knowledgeable about student barriers. Faculty and staff are eager to support their students in promoting their success and helping them persist to graduation. In addition, First-Year Seminar and other proactive programs connect students to resources such as tutoring, writing center, advising services, and more.

In addition to strengths, InsideTrack also discovered some critical areas of focus for CSUB in order to realize its strategic plan and GI 2025 goals. We learned there is room to improve and elevate holistic advising frameworks so that advisors can identify key retention risks and support students through those challenges. Academic advising and student learning outcomes have not been clearly defined. Essential data is incorrect in key areas such as the academic requirements/degree audit, causing confusion and extra work for staff, faculty, and students. Finally, we observed the opportunity to formalize and streamline collaborations between departments that would positively impact retention, graduation, and student experience. Combined, these areas impact retention and the campus' ability to support students from admittance to graduation.

KEY RECOMMENDATIONS

The purpose of InsideTrack's virtual needs assessment visit was to gather insights and understanding in order to provide the most practical recommendations for improving academic advising and making progress towards the GI 2025 goals.

To support California State University, Bakersfield (CSUB), InsideTrack has provided recommendations that the advising team can implement on their own and recommendations for further partnership between InsideTrack and CSUB. These are organized into four overarching categories:

1. Define a strategic advising plan for each school.

To support students at the right time with the right resources, each school developed its framework and a one-page description that shows when and by whom students are advised. It would be beneficial to create an overall definition of holistic academic advising and how it can impact student retention and graduation. To that end, Professional Staff Advisors, Faculty Advisors, and the Advising Leadership Team should:

- » Create student academic advising journey maps
- » Define holistic advising and identify the mission
- » Define the roles of Professional Advising Staff, Faculty Advisors, and the Advising Leadership Team
- » Define desired student learning outcomes from academic advising
- » Agree upon technologies and tools to use within each school
- » Establish a communication plan

2. Break down silos to foster intra- and inter-departmental trust.

Due to the decentralized nature of academic advising at CSUB, it is essential to build connections and communication pathways within and between departments. This is especially relevant for students who change majors, are undeclared, or double-major. Adopting holistic advising and creating an academic advising plan would help this process. Working together in cross-functional teams to create a student-centered academic advising experience will help staff and faculty partner to provide cohesive advising support, which addresses each milestone in advising. Simultaneously, the Professional Staff Advisors should also connect across schools to discuss strategies and best practices in their advising approaches. Through these processes, trust is built, and silos are broken.

3. Identify needs and deliver professional learning for Professional Staff Advisors and Faculty Advisors.

In adopting a new definition and elements of practice, staff and managers will need opportunities to learn and refine their skills. With the rollout of Runner Connect and the systematic fixing of errors on the academic requirements/degree audit, technical skills must be developed so that students and both Professional Staff Advisors and Faculty Advisors can get on the same page. We also recommend establishing a quality plan that allows for constructive feedback in order to support learning. Learning should become a new norm, and time should be set aside to reinforce the value of ongoing professional development.

4. Change management support.

Everyone experiences change differently, and it will be essential to employ change support principles in each stage to ensure the adoption of new approaches to advising. These recommendations are designed to build on one another to help the Professional Staff Advisors and Faculty Advisors become an effective, more cohesive team that seamlessly supports students through cross-departmental collaboration.

We will examine each of these recommendations in detail later in the document and outline specific strategies for each area. CSUB is taking intentional steps to expand holistic support for students. By understanding the ideal student experience, establishing proactive interventions, and embracing multichannel communication, the university will reach the right students at the right time with the right resources. It will be essential to invest in faculty and staff development so they can confidently support students' needs. InsideTrack looks forward to CSU B's feedback on the following needs assessment and is eager to help the university unlock their full potential to support all students.



Vision

InsideTrack and CSUB share a vision to support the GI 2025 goals in strengthening holistic advising and student support across the California State University system. In addition, the partnership aims to identify opportunities to realize the university's goals for student outcomes and success.

To help CSUB achieve its goals, InsideTrack conducted a needs assessment of the current advising and the intersecting departments with the purpose of:

- Identifying areas of strength
- Discovering primary obstacles or shortcomings in current operations
- Developing recommendations for improvement and implementation

We intend for our recommendations to help CSUB develop sustainable, proactive student support practices that produce a high return on investment.

Methodology

InsideTrack conducted a virtual needs assessment of CSU B's current advising operations and processes over 3.5 days in September 2020. The focus groups and interviews yielded important impressions about CSU B's current state and the goals for its future state. We conducted focus groups with representatives from various departments, including all schools· Professional Staff Advisors, Faculty Advisors, Student Services and Special Programs, Academic Deans, Department Chairs, Student Affairs Council, and current students. Please see the appendix for a full schedule, list of departments, and attendees.

During this process, InsideTrack gained an in-depth understanding of both the issues and the desired state, including what success looks like and why it is important to the future of CSUB. We came away with a sense of direction for the training needs for current faculty and staff, a clearer understanding of CSUB's culture and student profile, and a better grasp on how the advising systems can support students.

SCOPE AND LIMITATIONS

This needs assessment primarily focuses on how to leverage academic advising to support the goals of GI 2025. Our discovery sought to understand the experiences of CSUB students across all advising locations. The discovery visit schedule included a small sampling of students and six shadowing opportunities. We did not have a chance to discuss in great detail the advising systems and processes within each of the academic schools.

We included student feedback and interviews in the needs assessment discovery process. While we were able to meet with eight students and receive short survey feedback from 80 students, we recommend that CSUB pursue opportunities to learn directly from the students and use their feedback to inform solution design as they seek to improve retention and graduation rates.

HOW IT WORKS - OUR VIRTUAL NEEDS ASSESSMENT PROCESS



PROCESS

InsideTrack followed a four-phase process to identify opportunities to accelerate the needed changes. These phases are:

1. **Launch** the partnership by defining goals and desired outcomes, introducing key stakeholders from each team, and defining a project timeline
2. **Inquire** about more information - requesting materials and scheduling a site visit - to learn about CSUB's strengths and challenges
3. **Analyze** the information and identify recommendations
4. **Deliver** and discuss the needs assessment findings

TYPES OF DISCOVERY

InsideTrack used the following types of discovery to determine the current state of CSUB's environment and processes, as well as to investigate options for achieving goals:

Assigned consultants: Kristin Gurrola, Strategic Partnership Director with InsideTrack, was assigned as the lead consultant for this project and was responsible for the coordination of the virtual assessment visit and facilitation of weekly meetings. She also coordinated the trainings for the Professional Staff Advisors and Faculty Advisors. Amber Rose Dullea, Needs Assessment Specialist, was also assigned as a project consultant and was responsible for project research and writing the bulk of this report.

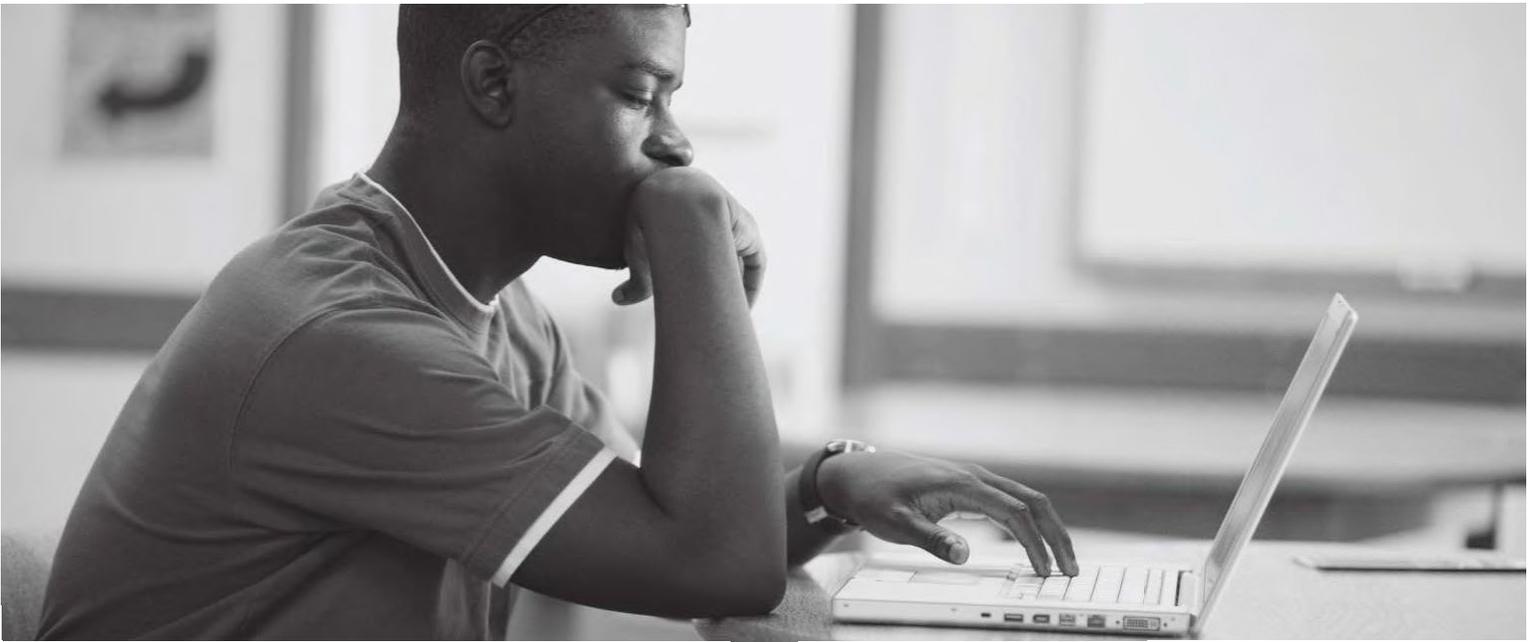
Virtual visit - 2 people for 3 1/2 days: Kristin Gurrola and Amber Rose Dullea virtually visited CSUB September 15-18, 2020. InsideTrack coordinated with CSUB to schedule time with a variety of individuals and groups from all levels. The goal was to formally collect information through meetings and informally through observations and impressions while shadowing.

Focus groups: InsideTrack had group discussions with the representatives from Professional Academic Advising, various student support departments and academic support programs, Faculty Advisors from each school, Academic Operations, Advising Leadership Team, Student Affairs Council (SAC), Enrollment Management Leadership, Student Affairs Leadership, Academic Support and Student Services Committee, Institutional Research, Planning and Assessment (IRPA), the Academic Advising and Resource Center, Academic Advisory Assembly (AAA), and CSU B's Deans and Associate Deans.

Individual interviews: InsideTrack conducted individual interviews with students.

Shadows: The discovery team shadowed Professional Staff Advisors to observe meetings, workflows, and processes firsthand and ask questions about daily responsibilities and the advising approach in a one-on-one setting.

Documentation review: Prior to the virtual visit, InsideTrack reviewed a comprehensive list of training documents, advising manuals, the university website, and a number of reports, including the University Strategic Plan 2019-2024.



Key Findings

The following pages describe InsideTrack's findings from the needs assessment. This section includes high-level SWOT analysis: a more detailed outline of observed strengths, weaknesses, opportunities, threats, and key recommendations.

SWOT ANALYSIS SUMMARY

A SWOT analysis is a visual representation of the strengths, weaknesses, opportunities, and threats InsideTrack identified during the visit and after reviewing the submitted documents. The focus areas identified here will be explored in detail later in this document.

STRENGTHS-INTERNAL/HELPFUL	WEAKNESSES - INTERNAL/HARMFUL
<ul style="list-style-type: none"> • Dedicated people who are knowledgeable and student-centered • First-Year Seminar that connects students to resources and advising • Multiple proactive student support programs • Professional Academic Advisors who are detail-oriented and process-aware 	<ul style="list-style-type: none"> • Lack of defined mission for Academic Advising • Lack of performance strategy, measurement, and accountability • Lack of cohesion and collaboration between some faculty and staff • Lack of trust in the academic requirements (system of record)
OPPORTUNITIES - EXTERNAL/HELPFUL	THREATS-EXTERNAL/HARMFUL
<ul style="list-style-type: none"> • Change management • Runner Connect rollout • Continue virtual student accessibility 	<ul style="list-style-type: none"> • Changes in executive leadership • Enrollment growth and resource capabilities • COVID-19 challenges

Strengths and Opportunities

It's an exciting time at California State University, Bakersfield (CSUB), a university clearly dedicated to serving its students. CSUB is focused on leveraging the university vision to be a model for supporting and educating students to become knowledgeable, engaged, innovative, and ethical leaders in the regional and global community.

Strengths

During our virtual visit InsideTrack had the privilege of getting to know CSUB employees who are passionate about student success. They have a deep-rooted knowledge of their students, their students' communities, and the challenges they face. Staff and faculty understand the student population's unique needs and are committed to decreasing the achievement gap. Listed below are the strengths we observed during our time with CSUB.

DEDICATED, KNOWLEDGEABLE PEOPLE WHO CARE

InsideTrack observed that faculty and staff interviewed during the virtual visit were dedicated to student success. They demonstrated an interest in and awareness of both students' needs and the importance of ensuring that student support initiatives "work for our students." This awareness has been leveraged in the creation of a variety of different advising outlines for each school. People work above and beyond to adjust to the new COVID realities in advising and instruction. For example, during our visit, the Professional Staff Advisors conducted a virtual advising fair that mimicked drop-in hours. Additionally, one student from Social Science and Education stated, *"One time I went in to talk about school, but I was having a hard time at home and my advisor was there for me to confide in and talk to me until I was feeling better."* This strong student focus will be valuable as CSUB aims to improve student success and academic advising policies and practices.

Faculty advisors shared their enthusiasm for mentoring students. Whether in a class or in advising meetings, faculty members share resources, community connections, and extracurricular opportunities to support their students' success.

CSUB employees are committed to student success, excited about deepening their institution's ability to support students, and loyal to CSUB as an institution and employer. InsideTrack observed that faculty and staff interviewed during the visit were able to speak in detail about the university's unique student population. Employees uniformly expressed their devotion to serving students and basing decisions on what would best benefit their educational journey. There is a culture of care around

ensuring a student is met where they are. Additionally, we witnessed an eagerness to collaborate with advising from Enrollment Services, Financial Aid, and the Institutional Effectiveness and Analytics department to support students through the use of data and data analytics. For instance, Academic Operations has worked through some issues and continues to work through others to correct an important tool, the academic requirements/degree audit. All in all, at CSUB, InsideTrack found a group of professionals who are hardworking and highly dedicated to better supporting students and advisors.

FIRST-YEAR SEMINARS THAT CONNECT STUDENTS TO RESOURCES AND ADVISING

The first-year seminars successfully connect students to student resources and advising. *"I felt more comfortable and better able to ask questions once I had my instructor as my advisor. I had been nervous as a first-generation student because I didn't know what to do."* Students not only hear about resources such as the AARC, probation advising, the jeopardy program, tutoring, library - they use them!

MULTIPLE PROACTIVE STUDENT SUPPORT PROGRAMS

CSUB has developed multiple proactive student support programs that work alongside Academic Advising. In addition to the Academic Advising and Resource Center, students can tap into other resources such as the Kegley Center for Student Success, Veterans Center, and the Helen Louise Hawk Honors programs. These programs assist student populations with additional support and resources. A stronger collaboration should increase the effectiveness of programs and advising.

DETAIL-ORIENTED AND PROCESS-AWARE

The mix of technologies and tracking systems necessitate that Professional Staff Advisors be both detail-oriented and aware of processes that encompass student records administration. With the switch to Runner Connect, an opportunity to streamline processes would allow students and advisors to work together to track student progress. It would place more emphasis on the importance of a holistic approach.

Opportunities

By leveraging existing tools and practices and by continuing to develop a guiding plan for academic advising, CSUB has ample opportunities ahead to support their student success initiatives.

ESTABLISH CHANGE SUPPORT PRACTICES

The changes being implemented by the Academic Advising team to ensure student success are ambitious and require cross-departmental coordination. For the advising teams to gain buy-in from detractors, they will need change management support. We recommend that CSUB leverage change management processes to support faculty and staff impacted by change and to mitigate any potential resistance or fatigue associated with continued change and development. Change support will help to clarify for faculty and staff what is and is not changing about their work supporting students - and why. There are significant change management resources available, which would help ensure the adoption of new practices, workflows, and technology. Some of these resources are available in the appendix.

TAILOR RUNNER CONNECT (EAB NAVIGATE) FOR A SMOOTHER STUDENT EXPERIENCE

To further enhance how students experience academic advising at CSUB, there are opportunities to improve how students interface with the team through Runner Connect. The roll out of the system allows an important opportunity to use the same system across the campus. This will allow better access for Professional Staff Advisors, Faculty Advisors, and students to see where the student is, find any outstanding requirements, and collaborate - especially during intersessions when faculty are not available. Also, the tools to support appointment setting should be streamlined to ensure that all advisors and students are able to connect with the most useful information. In order for this to be successful, additional resources are needed to make sure that the data is accurate for the change in systems, such as the academic requirements/degree audit.

CONTINUE VIRTUAL STUDENT ACCESSIBILITY

CSUB has been agile and adaptive to the realities of COVID-19. Advising has moved many of its materials to electronic form and video conferencing, making them more accessible to students. As a result, some students now have more access to advising since they do not need to travel to campus during their workday or pay for gas and parking. The virtual advising fair is one of these adaptations. Keeping these adaptations in place when people are able to physically come back to campus can support greater accessibility for students, especially for commuter students who work.

Weaknesses and Threats

At the core of this assessment, InsideTrack discovered a group of professionals who work hard and think critically about how to better support students. The uncertainty, inefficiencies, and frustrations exhibited in advising should not be interpreted as a sign of unfitness. Instead, we believe that with direction and clarity, this team is ready to strategically reach students and positively impact the advising experience, overall student retention, and graduation outcomes.

Weaknesses

The following areas for focus or improvement were observed during the needs assessment. If not addressed, these areas could potentially lead to challenges in leveraging strengths and opportunities.

LACK OF DEFINED MISSION FOR ACADEMIC ADVISING

The focus groups with Faculty Advisors, Professional Staff Advisors, and students revealed confusion and disparate views about academic advising - what it is and how it is valued across the campus. The one-sheet frameworks for each school show who provides advising and when it is provided. Students report being introduced to the general concept of advising but have an incomplete understanding of how advising in general can enhance students' experience and specifically how it fits into their own CSUB experience. The most frequent answer to the question of why students go to academic advising was to get advising holds lifted. This is a missed opportunity.

Transactional vs. holistic advising - Our focus groups prompted a question about the goal of advising: is it about course scheduling, academic planning, and ensuring students are taking the right courses for their educational plan? Or is it also about creating connections and supporting the student holistically? Some students noted that in addition to discussing course requirements and class planning, they also were asked about their personal life. In contrast, other students reported that advising sessions were used to get paperwork signed and have registration holds lifted. As one student said, "I go to advising just to get my hold taken off."

Proactive vs. reactive - Across all advising functions, most report a more reactive approach to student needs even though they expressed an interest in having a more proactive approach. Despite the interest in being proactive, it is unclear when outreach from advisors would be more beneficial and/or mandate an academic advising session. There is a lack of data-informed planning and decision-making to support proactive approaches to advising at CSUB.

The varying experiences of students are the result of an undefined academic advising philosophy and methodology. With advising holds every semester, students experience advising as a barrier rather than a proactive holistic experience. Consequently, it is creating a culture in which students are resorting to being passively advised or seeking support from peers, thus perpetuating misinformation and the devaluation of academic advising sessions.

LACK OF PERFORMANCE STRATEGY, MEASUREMENT, AND ACCOUNTABILITY

The decentralized nature of advising at CSUB presents challenges for leaders to articulate a strategy or desired workflow for advisors. In addition, advisors lack a data management system that allows them to easily and readily access student information. For example, the academic requirements/degree audit has been inaccurate for a while due to catalog changes. The Office of Academic Operations and Support has been working to fix errors systematically. During discovery, we learned that advisors spend up to an hour preparing for a 15-30 minute advising appointment. A smooth rollout of Runner Connect would permit highly effective and more impactful use of advisor time. For example, having access to see different demographics such as first-year students, students on probation, undeclared students, students who have yet to enroll in developmental math, or students who have less than 9 credits to graduate can improve proactive outreach. Another system in the works is Program Plan Mapper, which would allow students to see exactly which courses they need to take and in what order to graduate on time. This is especially useful for transfer students who come with Associate Degrees for Transfers.

While some variance is necessary and even healthy for tailored student support, too much can result in the duplication of work, inability to track success measures, and an inconsistent student experience. In excess, variance creates a "silo effect"² between team members and departments, which results in inefficiency and the need to reinvent the wheel, instead of encouraging departments and individuals to share and learn from each other's best practices. Examples of gaps in documented workflow expectations and procedures include not having:

- Clearly articulated, distinct role descriptions for Professional Staff Advisors and Faculty Advisors
- An agreed-upon measure of success for academic advising
- Activity metrics and performance expectations for all advisors
- A formal feedback loop for performance reflection and accountability
- Onboarding strategy and training curriculum for both Professional Staff and Faculty Advisors

The lack of documented procedures and expectations has perpetuated varying workflows across the team and an inability to measure the efficacy of each advisor's approach. Without a strategy, measurement, and accountability, it is difficult to confidently understand advisor expectations, collaborate as a department towards known team goals, and capitalize on best practices within student support.

LACK OF COHESION AND COLLABORATION BETWEEN SOME FACULTY AND STAFF

Faculty and staff were very forthcoming about pockets of tension between Faculty Advisors and Professional Staff Advisors. Both groups expressed areas of mistrust in the advising that was done by the other. When we asked a faculty focus group about Professional Staff Advisors, they expressed concern about some bias against certain majors, courses, and faculty. At best, the resources provided by the Professional Staff Advisors are not being leveraged to their fullest extent to enhance student success. At worst, without open communication and collaborative efforts, there is the risk of increasing the divide between faculty and staff. As a result, students will feel this divide, and the confusion, mistrust, and tension between faculty and staff advising will intensify.

Professional Staff Advisors first came on board to work through the quarter-to-semester transition. After this transition, each school and some departments have worked to utilize the Professional Staff Advisors' advising department in different ways. For some departments, one advisor has been chosen to advise their students. This has been working from the chair's perspective. One unintended consequence, however, is that if the advisor is out, other advisors are told they cannot fill in and work with the student. This is a detriment to student access. There is also the continuity issue if one advisor moves on from their role, leaving no one else familiar with the department they've been advising. Students who change majors and undeclared majors also do not fit well into this scheme. On the other hand, there are departments that elected to have all advising done by Faculty Advisors. Although these different assignments to advisors are called out in each school's advising framework, there is an opportunity to evaluate the roles and responsibilities of advisors to ensure adequate access and support of students.

LACK OF TRUST IN THE ACADEMIC REQUIREMENTS (SYSTEM OF RECORD)

Advisors spend a lot of time researching each student through the advising-dependent data and systems because they do not trust the information. As stated before, advisors can therefore take up to an hour to do the backend work before an advising appointment. In many focus groups, one example kept coming up: the academic requirements/degree audit page. As the system of record, this should be where advisors and students get accurate information; however, there are gaps in the data and incorrect information. Students do not use this page because they are told it is not accurate. Aware of these issues, the Academic Operations and Support office has been working to fix them, but due to lack of resources and the systemic nature of the issues, this has been a long-term project.

Threats

During our assessment, we heard some themes around uncertainty. The primary threats that emerged are explained below.

COVID-19

As stated earlier, COVID-19 has had a tremendous impact on CSUB. This continuing threat brings uncertainty to the future of advising and instruction, which puts stress on the whole campus.

While all students are experiencing disruptions to daily life as a result of COVID-19, research shows that certain populations are at higher risk of pandemic-related hardships. Latina/as, for example, have a higher likelihood of contracting the virus or knowing someone who has. In California, where 39.3% of the population identifies as Latina/a, 49.2% of those who have died from COVID-19 are Latina/a. Given that CSUB is a Hispanic Serving Institution (HSI), this data should be especially concerning.

On top of the virus's direct impact, there is also the indirect impact of the pandemic in disruptions to daily life. These challenges include job loss, limited childcare options, and in-person school closures, all of which create logistical challenges for students, particularly on a financial level.

Research bears out that COVID-19 is impacting families' ability to pay for school. According to recent reporting from the Washington Post, "a recent Census survey said 16 million Americans have canceled plans to go to college. The biggest reasons given were fears over contracting COVID-19 and not being able to afford college given the economic disruption caused by the pandemic. Students from families that earn less than \$75,000 a year are more than twice as likely to have canceled college plans this

semester."³ Additionally, EAB found that for Fall 2020, deposits for school dropped compared to the previous year most dramatically for students in the lowest income brackets. Given CSUB's high proportion of students in these impacted populations, Academic Advising is likely to see an increase in students experiencing challenges with covering the cost of tuition, which could reduce retention.

CHANGES AND VACANCIES IN EXECUTIVE LEADERSHIP

CSUB has undergone a tremendous amount of organizational change, including shifts in upper leadership in the Provost's and Associate Vice Presidents' offices. Also, there have been significant changes on the Advising Leadership Team. This increases the likeliness of initiative and change fatigue for those carrying out directives. Leadership changes may hamper the momentum or the ability of CSUB to implement changes successfully. Interim, or perceived as interim, positions are not always viewed by staff as positions of power, and the existence of these positions can make reinforcing change difficult.

ENROLLMENT GROWTH AND RESOURCE CAPABILITIES

CSUB is growing. While the growth is exciting, resources are limited to ensure appropriate staffing levels for student support. Future growth without a plan to maintain a high level of academic advising service would have significant consequences for the student experience.



Recommendations

SUMMARY OF DESIRED STATE AND KEY FINDINGS

InsideTrack is partnering with California State University, Bakersfield (CSUB) to understand their current and desired state of academic advising in hopes of contributing to the university's successful achievement of its Graduation Initiative 2025 goals. By enlisting the expertise, perspective, and support of InsideTrack, CSUB leadership believes they will move more quickly, develop a stronger plan, and generate better outcomes toward these goals.

In order to support CSUB, InsideTrack has provided recommendations for further partnership between InsideTrack and CSUB as well as recommendations that the advising teams can implement on their own. Based on our evaluation, these recommendations are organized into four main categories:

- 1. Create a strategic advising plan for each school**
 - » Create student academic advising journey maps
 - » Define holistic advising and identify its mission
 - » Define roles of Professional Advising Staff and Faculty Advisors
 - » Define student learning outcomes for academic advising
 - » Agree upon technology and tools across each school
 - » Establish a communication plan
- 2. Break down silos to foster intra- and inter-departmental trust**
- 3. Identify professional learning needs for professional staff advisors and faculty advisors**
- 4. Implement change management support**

These recommendations are designed to build on each other to help the Professional Staff Advisors, Faculty Advisors, Advising Leadership Team, Department Chairs, Associate Deans and Deans become a stronger, more cohesive team that seamlessly supports students through cross-departmental collaboration.

CREATE A STRATEGIC ADVISING PLAN FOR EACH SCHOOL

To help inform strategic planning, CSUB will need to dedicate time to defining their advising mission and vision, strategy, and methodology. The existing advising frameworks provide a foundation to build upon. Advisors will benefit from a plan and strategy for addressing roster management and student communication, which will be rooted in the student journey and associated key milestones. There is an opportunity for the Advising Leadership Team (ALT) to play a critical role in supporting and championing this work within each school. In order to accomplish this, there are specific steps that must be taken. InsideTrack can support this process through solutions consulting, program design, and professional development opportunities.

CREATE SCHOOL-BASED STUDENT ACADEMIC ADVISING JOURNEY MAPS

We recommend that CSUB complete student journey maps for each school that outlines a student experience from admission to graduation from a student's perspective. InsideTrack can facilitate this process with CSUB, which includes mapping and visualizing the unique journey of their students while pinpointing strengths and the changes needed. The most critical outcome of student journey maps is determining how to best design an academic advising plan from admittance to graduation for students. We recommend that CSUB pursue opportunities to learn directly from the students and use their feedback to inform the journey maps.

This process will allow each school to identify the following key areas:

- Unique needs of students depending on their length of time at the university
- Retention and graduation risks to establish and implement early and proactive interventions
- Transition points for students and how these impact retention and graduation
- Equity practices that support student success and gap areas that need to be addressed to ensure an equitable experience for all students at CSUB

Among Professional Staff Advisors and faculty, the process of journey mapping also supports clear delineation of who is responsible for what and when. Journey mapping should address the questions: What do you want your first-year students to know, understand, and experience at CSUB? What about the subsequent years? Designing a desired student experience map will not only highlight the communication priorities for a given year but also could be utilized to target academic advising services that would yield the greatest impact. The schools should prioritize mapping the experience of first-year students to help inform the key milestones and retention strategy for this student population. The next priority group would be second-year students.

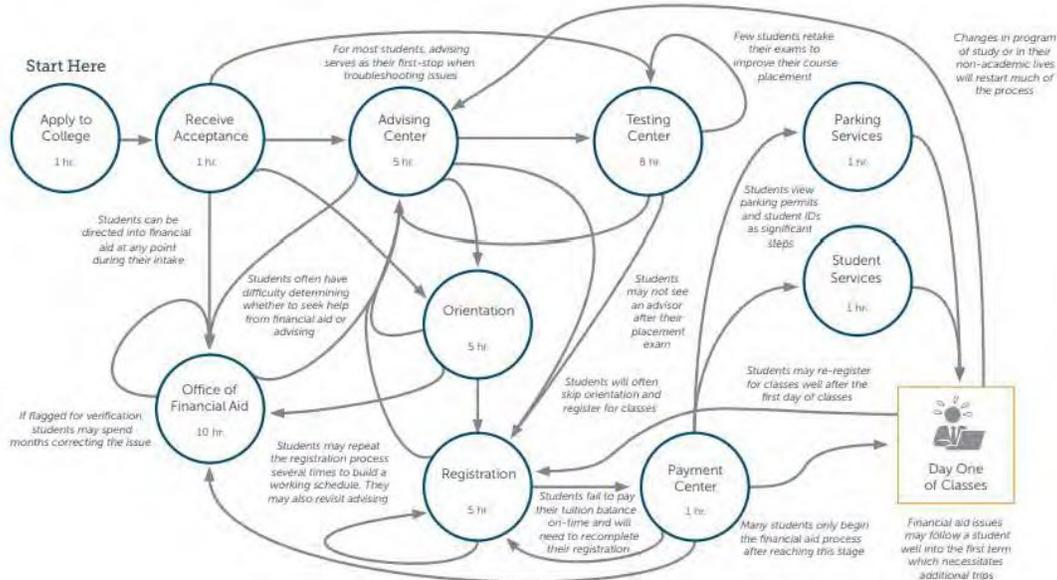
Some themes we heard throughout our visit that could be incorporated into a student experience map include:

- Year one: Understanding CSUB systems and student resources, transitioning to college-level work, and building a sense of belonging

- Year two: Choosing a major and career introduction and exploration
- Year three: Evaluating progress towards degree completion (proactive examination of unrestricted electives, understanding internship requirements, etc.)
- Year four: Completing requirements for graduation, and career guidance to assist the transition from the academic to the professional world

Given the large transfer student population at CSUB, we also recommend completing a student journey map for transfer students. While there may be areas of overlap with first-year students, we believe distinctions will be revealed and key areas to connect will be highlighted for this student population. In addition to increasing efficiency and eliminating redundancy, this increased visibility into the current state of the transfer student experience will foster trust between departments and a greater understanding of the value each department brings to the university at large.

Below is an example of a student journey map, which depicts what a student experiences from the time of application to the first day of class.⁴ As the map illustrates, the process is not linear. Student journey mapping helps build greater awareness of pain points and hurdles that students experience. In turn, it becomes a helpful tool to determine areas of change for the system.



DEFINE HOLISTIC ADVISING AND IDENTIFY THE MISSION WITHIN EACH SCHOOL

The goals of GI 2025 offer a means to unify the advising team. A shared vision coupled with increased role clarity creates an opportunity to design or revisit evaluation and performance management systems. Advisors and their managers will need to align on what success looks like for all advisors, how success is measured as it relates to GI 2025, and how they will be held accountable. Creating a shared vision and shared goals for this team of dedicated professionals can only improve student retention and persistence.

A holistic advising approach will allow advisors to target students who need help and address all areas that impact persistence and retention. Advisors cannot look at a student through a purely academic lens, but rather must regard them as a whole person. Whatever is happening in their personal lives can weigh just as heavily on their academic success. Holistic advising can provide a process for helping students navigate academic challenges, financial concerns, and career goals; manage their time and commitments; and identify and build on their core motivation.

This holistic approach to Academic Advising is consistent with aspects of the coaching model developed by InsideTrack. As Dr. Eric P. Bettinger and Dr. Rachel Baker describe in their study of the model's efficacy, "coaches focus significant time assessing the student's life outside of school, which InsideTrack has found to be the leading influencer on student persistence and completion. Topics such as personal time commitments (work scheduling), primary care-giving responsibilities, and financial obligations are common during a student-coach interaction."⁵ In their randomized study, Bettinger and Baker found that students who received coaching of this type were 5 percentage points more likely to persist in college than those who did not receive coaching.⁶

The student focus wheel below illustrates the key topics that InsideTrack Coaches assess in interactions with students and which Academic Advisors at CSUB also described as important topics for each conversation with a student:



We recommend that CSUB establish a shared mission and sense of purpose for the advising team at large. This mission should be co-created by the Advising Leadership Team, Professional Staff Advisors, advising leadership, Faculty Advisors, and Department Chairs. It should address things such as the foundational values of holistic advising, agreed-upon expectations for team participation, a commitment to accountability, and team collaboration. This team needs to own their team dynamic and rewrite the role they seek to fill within the university. The team should discuss and document:

- What mission drives us not only at the individual level but also collectively as an advising team?
- How do we want to be seen as a team?
- What goals do we have to keep pursuing so that we advance as a team?
- What does team collaboration look like?
- How are decisions made?
- How do we hold ourselves accountable?

A mission is a compelling goal that defines, motivates, and inspires a person or team toward achievement and success. A mission statement is a brief description of a team's fundamental purpose. It articulates the team's purpose both for those within the team and for outside constituents.

High-performance teams vividly envision the future they want and often see themselves achieving their mission and goals. Every team should have a mission statement to ensure that everyone is "on the same page" and to serve as a baseline for effective planning.

In order to support the vision and mission, it is helpful for a team to define the values with which they will align and operate. In addition, the team should have a plan for how they will use the mission and vision to guide their actions and decisions on an ongoing basis.

DEFINE THE ROLES OF PROFESSIONAL ADVISING STAFF AND FACULTY ADVISORS

To address confusion between staff, faculty, and students, CSUB needs to clarify roles and responsibilities for academic advising within each school. The descriptions should clearly outline the way in which each person interacts with students. This clarification is best started by agreeing on a shared mission and vision of what advising is so that each role serves a unique purpose that is tied to the goals of the institution.

Role descriptions should also clarify whether and when a particular role is expected to provide proactive and/or reactive student support. If a particular role is designed to lend only reactive support, leadership should clarify this scope of responsibility to the team and should eliminate tasks that do not reinforce this vision. If a particular role should at any point be reaching out proactively to students, the description and expectations should in turn match this vision.

While this is just one anecdote, data collected by Tyton Partners suggests that role clarity may have a broader impact on student success.⁷ Specifically, institutions where a majority of administrators place importance on having clear lines of responsibility see the highest increases in student retention over time as compared to institutions whose administrators do not.⁸ Student feedback and broader trends also suggest that role clarity is crucial for maximizing the positive impact of academic advising.

Addressing the advising load at all levels will be important to ensure progress toward the vision. Given the reality of limited resources, CSUB will need to be strategic and pragmatic in its attempt to address caseload size. To determine the equitable ratios for advising caseloads, we recommend an evaluation of the current demands placed on both advising roles while reviewing factors that impact the demands on each advisor's time, such as advising practices, student population needs, and information technology support.

DEFINE STUDENT LEARNING OUTCOMES FROM ACADEMIC ADVISING

One of the primary goals of CSUB's University Strategic Plan 2019-2024 is to strengthen and inspire student success and lifelong learning. Specifically, CSUB aims to "increase student well-being, increase retention and graduation, develop and enhance advising, enhance career preparation and success, and increase student engagement."⁹ Embracing a "lifelong learning" mentality in academic advising keeps in mind that students need to take responsibility for their success. Doing everything for the student does not allow the student to learn the skills needed for navigating a complex system. Academic advising is an opportunity for students to develop and strengthen noncognitive skills and take ownership over their education. Defining learning outcomes affects educational outcomes by bringing students into the shared responsibility of their academic advising experience. Since we know what focus areas impact student success, learning outcomes can help students explore how different focus areas may affect their ability to persist and graduate. This can have a positive impact on retention and graduation rates.

Advising teams should consider the following questions in the design and documentation of student learning outcomes for academic advising:

- What do students need to know about academic advising and their academic plans (knowledge)?
- What do students need to be able to do to successfully engage in academic advising and their academic plans (skills)?
- What do students need to believe about academic advising and their academic plans (attitudes and beliefs)?
- In what ways will we evaluate academic advising student learning outcomes?
- How will we communicate defined learning outcomes to our students?

AGREE UPON TECHNOLOGIES AND TOOLS ACROSS EACH SCHOOL

With the onboarding of Runner Connect, CSUB has an opportunity to streamline processes and gain agreement across schools. With COVID-19, many tools are now online but are not universally utilized within schools or departments. We learned through focus groups and student interviews there are various types of academic outlines/maps being provided to students: Excel spreadsheets, editable PDFs, and paper forms. Agreeing on common tools for academic outlines/maps will have a positive impact on the student experience.

Advisors spend a lot of time researching each student through the advising-dependent data and systems because they do not trust the information. In many focus groups, one example kept coming up: academic requirements/degree audit. This should be where Advisors and students go to get accurate information, but the information is not always correct. The Academic Operations and Support team is aware of these issues. They have been working tirelessly in a systematic process to fix the issues. Due to the lack of human resources and the systemic nature of the issues, this has been a long-term project. With the roll-out of Runner Connect, it is imperative that the data is trustworthy so that everyone can work together.

When accurate data is available and accessible, Advisors can utilize it to identify students to proactively reach out to. Such key leading indicators can be if a student has registered, if they have unpaid balances if they have had advising or not, if they are close to graduation, or if they have hit a particular milestone that the journey map identifies. This can be incredibly helpful in proactive, holistic advising.

ESTABLISH A COMMUNICATION PLAN

It is important to establish an ongoing communication plan to define who needs to be aware of/informed about advising, to align staff and stakeholders, to determine how and how often information will be distributed, and to decide who will be responsible for the distribution. Areas to be considered to ensure streamlined communication to all relevant stakeholders includes curricular changes, catalog changes, and any changes/adjustments to academic policies. It is critical that all those involved in managing curricular changes follow established processes and forms submission in partnership with Academic Operations and Support.

BREAK DOWN SILOS TO FOSTER INTRA- AND INTER-DEPARTMENTAL TRUST

Breaking down silos is important to reestablish trust across the advising landscape and to improve student outcomes. Building connections and communication pathways between schools and departments will help staff and faculty partner together in their efforts to provide cohesive advising support. Simultaneously, the Professional Staff Advisors should continue to connect as a team to discuss team strategies and best practices in their own advising approaches across schools. We recommend that other professional advisors such as advisors for special populations and AARC advisors be brought in for regular meetings as well.

The decentralized nature of academic advising at CSUB makes it important to have communication within and between departments and schools. Best practices can be shared to support all. This is especially important when students change majors, are undeclared, or double-major. Students who move between schools can get confused. The process of adopting holistic advising and creating an academic advising plan are opportunities for communication and collaboration to happen. Working together in cross-functional teams to create a student-centered academic advising experience will help staff and faculty partner to provide cohesive advising support and build trust.

There is a strong correlation between increases in retention and effective cross-departmental collaboration within colleges and universities. According to research conducted by Tyton Partners, higher education institutions that are the most collaborative across departments have seen the largest increases in two- and four-year retention rates from 2012-13 to the 2017-18 academic year as compared to institutions with less cross-departmental collaboration during that same timeframe.¹⁰ When surveyed, administrators in the most collaborative institutions broadly agreed regarding lines of responsibility and cross-functional communication.

IDENTIFY PROFESSIONAL LEARNING NEEDS FOR PROFESSIONAL STAFF AND FACULTY ADVISORS

In adopting new elements of practice, advisors will need opportunities to learn and refine their skills. We also recommend establishing a plan that allows for constructive feedback in order to support learning and ensure the quality of academic advising. Learning should become a new norm, and time should be set aside to reinforce the value of ongoing professional development. Both Professional Staff Advisors and Faculty Advisors identified learning opportunities. For example, Professional Staff Advisors and Faculty Advisors shared a desire to be equipped with mental health first aid tactics. Faculty Advisors in the new Council of Faculty Advisors identified the desire for more technical training with Runner Connect and PeopleSoft.

School leadership and the cross-functional Advising Leadership Team should continue to evaluate professional development needs for advisors and advocate for time and financial resources (if needed) to support these experiences. Professional Staff Advisors shared that the primary focus for professional development has been through NACADA conferences and events, including conference presentations. Given the current landscape of COVID-19, we recognize there may be impacts to professional development budgets. There is

an opportunity, however, to explore how professional development can be offered at low to no cost - such as attending free virtual workshops, webinars, and learning platforms; participating in student success events offered by the CSU Chancellor's Office, and diving into the latest research on academic advising and student success - and applying these learnings to advising at CSUB. Advisors and advising leadership should consider ways to facilitate CSUB-led professional development through experiences such as lunch and learns, coffee talks, and on-demand videos of subject matter experts covering a priority topic in student success. Advisors, both professional staff and faculty advisors should have an onboarding process that includes orientation and training.

CHANGE MANAGEMENT SUPPORT

Everyone experiences change differently, and it will be important to employ change support principles in each stage to ensure the adoption of new approaches to advising. These recommendations are designed to build on one another to help the Professional Staff Advisors and Faculty Advisors become a stronger, more cohesive team that seamlessly supports students through cross-departmental collaboration. Change management support could be facilitated by support from InsideTrack.

While the passion for serving students at the highest level is one of CSUB's greatest strengths, the duration and rate of change can also lead to initiative fatigue among faculty and staff. InsideTrack envisions embedding change support principles into each stage of re-design and implementation to support the adoption of changes and to secure the maximum return on investment. Change support best practices require that program leadership dedicate resources upfront to understanding and tending to the needs of their people. Successful change support will mitigate the risks associated with employee turnover, disengagement, and resistance.

We recommend that change support strategies focus on the following:

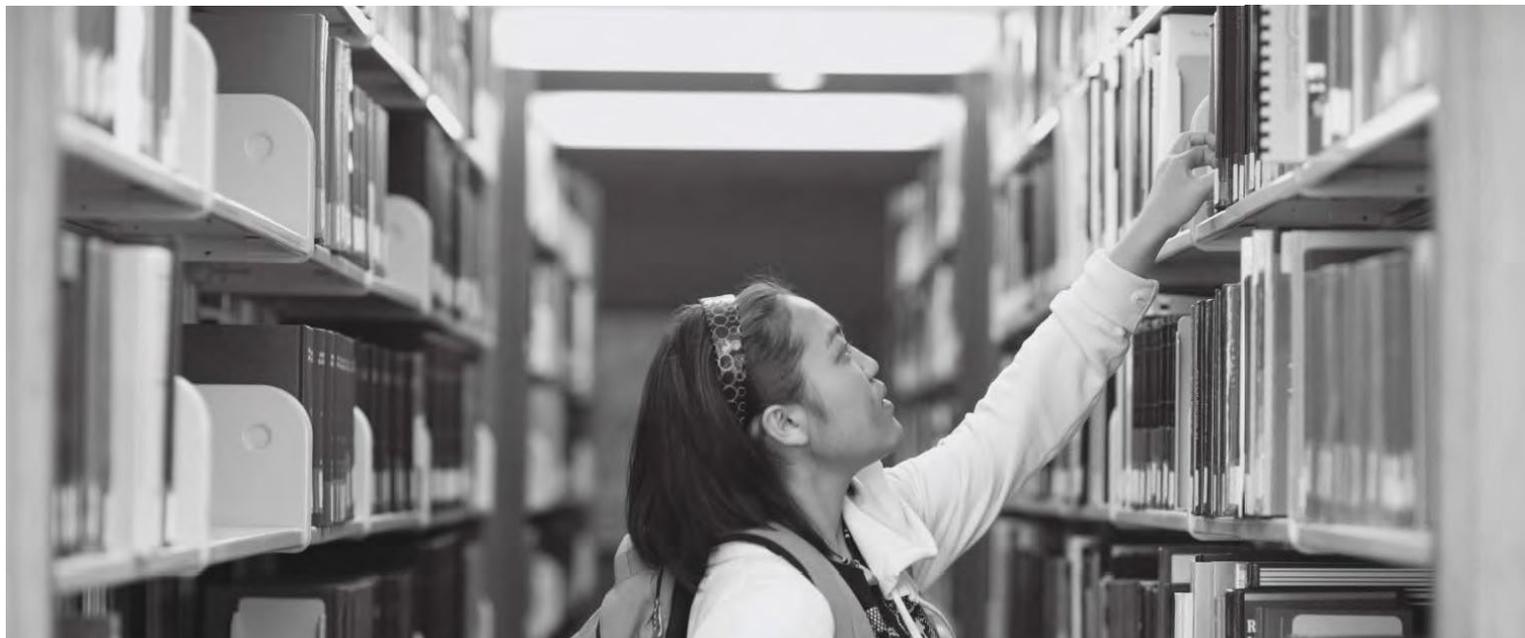
- Defining the change and how it impacts employees by answering:
 - » What is the change?
 - » Why is it happening?
 - » What's in it for me?
- Ensuring that current state, transition state, and desired state are clear for all who are impacted
- Ensuring that executive sponsorship remains active, visible, and approachable throughout the implementation
- Devising a communication plan (using Prosci principles¹¹), including recognizing process and successes and providing team-wide updates
- Identifying potential resistance and planning ongoing resistance management
- Performing formative and summative assessments (ADKAR survey¹²)
- Connecting business outcomes and learning outcomes, if relevant, so staff know the purpose of the partnership between CSUB and InsideTrack

As members of the advising team grow at their own pace, the focus of change support efforts will likely shift from promoting the "new program" toward the successful transition to a new cultural paradigm in advising.

Conclusion

CSUB is an institution committed to serving its students and the Central Valley community. The university continues to seek ways to improve and strengthen its ability to reach the GI 2025 goals, uphold its commitment to equity and inclusion, and support students at all stages in their educational journey. This report is designed to outline how CSUB can leverage its strengths and opportunities to improve student retention and persistence while providing holistic student support.

InsideTrack's recommendations seek to call out areas of improvement and provide recommendations rooted in equity and sustainability. Ultimately, we believe that CSUB can reach their GI 2025 goals and that our partnership will help generate those improvements by supporting systemic changes that will better equip faculty and staff to support students.



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Appendix A

InsideTrack Virtual Advising Assessment Schedule

TUESDAY, SEPTEMBER 15, 2020	
8:30-9:00	Steering Committee Check-In: InsideTrack team along with CSUB Steering Committee meet to discuss the agenda for the day+ share updates Participants: Debra Jackson - Interim AVP for Academic Affairs, Dean of Academic Programs; Luis Vega - Interim Associate Dean, Graduate and Undergraduate Studies; Ilaria Pesco - AVP Student Success/Student Affairs and Executive Director, Associated Students Inc.; Tanya Boone-Holladay - Associate Dean, Social Sciences and Education; Seung Bach - Associate Dean, Business and Public Administration; Kristin Gurrola - InsideTrack Strategic Partnership Director; Amber Rose Dullea - InsideTrack Assessment Specialist
9:00-9:30	Break and set up for kickoff presentation
9:30-10:00	Advising Assessment Kickoff: This is an opportunity for anyone participating in interviews, focus groups or roundtables to learn about InsideTrack, how we are partnering together, and the goals of the advising assessment Participants: Vernon Harper - Provost & VP for Academic Affairs
10:00-10:30	Break
10:30-11:30	Advising Leadership Team: Luis Vega- Interim Associate Dean, Grad and Undergrad Studies; Deisy Mascarinas - Administrative Support Coordinator; Liora Gubkin-A&H Associate Dean; Janine Cornelison-A&H Academic Advisor; Seung Bach - BPA. Associate Dean; Belen Mendiola - BPA Academic Advisor; Todd McBride- NSME Associate Dean; Anayeli Gomez-Navarro - NSME Academic Advisor; Tanya Boone - SSE Associate Dean; Karen Ziegler-Lopez- SSE Academic Advisor; Andrew Dickenson - Athletics Academic Advisor; Ilaria Pesco - AVP Student Success; Lisa Zuzarte - Director, Academic Operations and Support; Melisa Medina Cruz - Athletics Academic Advisor
11:30-12:30	School of Arts and Humanities (AH) Faculty Advisors: Jesse Sugarmann - Art and Art History Chair; Mary Slaughter - Communications Chair; Steve Frye - English Chair; Miriam Vivian - History Chair; Dustin Knepp - Modern Languages & Literatures Chair; Joel Haney - Music & Theatre Chair; Steve Gamboa - Philosophy & Religious Studies Chair; Alicia Rodriguez - Interdisciplinary Studies Chair
12:30-1:15	Lunch
1:15-2:15	School of Business and Public Administration (BPA) Faculty Advisors: Di Wu - Accounting and Finance Chair; Aaron Hegde - Economics Chair; John Tarjan - Management/Marketing Chair; Chandra Commuri - Public Policy Administration Chair
2:15-3:15	School of Natural Sciences, Mathematics and Engineering (NSME) Faculty Advisors : Paul Smith - Biology Chair; Karlo Lopez - Chemistry & Biochemistry Chair; Melissa Danforth - Computer & Electrical Eng & Computer Science Chair; Anthony Rathburn - Geological Sciences Chair; David Gove - Mathematics Chair; Deborah Boschini - Nursing Chair; Luis Cabrales - Physics & Engineering Chair
3:15-3:30	Break
3:30-4:30	Social Sciences & Education (SSE) Faculty Advisors: Yeunjoo Lee - Educational Administration Chair; Elaine Correa - Child, Adolescent and Family Studies Chair; Reem Abu-Lughod - Criminal Justice Chair; Kris Grappendorf- Kinesiology Chair; Mark Martinez - Political Science Chair; Kyle Susa - Psychology Chair; Janet Armentor - Sociology Chair; BreAnna Evans-Santiago - Teacher Education Chair; Adam Sawyer - Liberal Studies Director
4:30-5:00	Steering Committee End of Day Check-in: InsideTrack team along with CSUB Steering Committee meet to recap the day+ share updates Participants: Debra Jackson, Luis Vega and the Associate Deans

WEDNESDAY, SEPTEMBER 16, 2020

8:30-9:00	Steering Committee Check-In: InsideTrack team along with CSUB Steering Committee meet to discuss the agenda for the day+ share updates Participants: Debra Jackson - Interim AVP for Academic Affairs, Dean of Academic Programs
9:00-11:00	All Schools Professional Staff Advisors: Adriana Sixtos - A&H Academic Advisor; Christina Ramires - A&H Academic Advisor; Janine Cornelison - A&H Academic Advisor; Cindy Zuniga-Prado BPA Advising Coordinator; Christina Hernandez - BPA Academic Advisor; Belen Mendiola - BPA Academic Advisor; Jaimi Paschal - NSME Advising Coordinator; Micah Lopez - NSME Academic Advisor; Dodie Hyatt - NSME Academic Advisor and LSAMP Coordinator; Glenda Guizar - NSME Academic Advisor; Yolanda Moreno - NSME Academic Advisor; Jeannie Gonzalez- STEM Pathways Advisor; Paul Salie - STEM Pathways Advisor; Anayeli Gomez-Navarro - NSME Academic Advisor; Eva Deleon - PreHealth Advisor; Yvette Morones - SSE Advising Coordinator; Feliza Sanchez - PSYC Advisor; Irene Monroy - ANTH & SOC Advisor; Jennifer Henley - PLSI Advisor; Luz Ramirez - CRJU Advisor; Karen Ziegler-Lopez - KINE Advisor; Gilverto Herrera - CAFS Advisor; Araceli Esparza - Liberal Studies Advisor; Dina Hallmark - Liberal Studies Advisor; Sonia Gonzalez - Liberal Studies Advisor; Lea Antone - CSUB Antelope Valley Academic Advisor; Gabriela Ochoa Vega - International Students Academic Advisor; Alexandria Rockey-Teacher Education Advisor
11:00-11:15	[Break
11:15-12:00	Student Affairs Senior Leadership: Dr. Thomas Wallace, Vice President of Student Affairs; Dr. Jim Drnek, Associate Vice President Student Affairs/Dean of Students; Dr. Markel Quarles, Asst. Vice President Student Affairs/Student Services; Dr. Ziggy Siegfried, Asst. Vice President Student Affairs and Director of Athletics (<i>attending in place of Ziggy- Melisa Medina Cruz - Kegley Center for Student Success Assistant Director</i>); EJ Callahan, Asst. Vice President Student Affairs/Student Centered Enterprises Inc.; Ilaria Pesco, Asst. Vice President Student Affairs/Student Success and Executive Director of ASI
12:00-12:30	Lunch
12:00-1:00	Career Education and Community Engagement (CECE): Katrina Gilmore, Interim Director CECE; Diane Allford, Career Counselor; Janet Rivera, Career Counselor
1:00-2:00	Student Affairs Council (SAC): Dr. Thomas Wallace, Vice President of Student Affairs; Dr. Jim Drnek, Associate Vice President Student Affairs/Dean of Students; Dr. Markel Quarles, Asst. Vice President Student Affairs/Student Services; Dr. Ziggy Siegfried, Asst. Vice President Student Affairs and Director of Athletics (<i>attending in place of Ziggy - Melisa Medina Cruz - Kegley Center for Student Success Assistant Director</i>); EJ Callahan, Asst. Vice President Student Affairs/Student Centered Enterprises Inc.; Ilaria Pesco, Asst. Vice President Student Affairs/Student Success and Executive Director of ASI; Ruby Alvarez, Director Student Rights and Responsibilities; Crystal Becks, Director Housing; Emily Callahan, Director Campus Programming; Janet Millar, Counseling Coordinator; Janice Clausen, Director Services for Students with Disabilities; Erika Delamar, Asst. Director Student Health Services; Michael Dotson, Coordinator Project Rebound; Katrina Gilmore, Interim Director Career Education and Community Engagement; Isabel Gonzalez, Student Affairs Budget Analyst; Nicole Gorrell, Asst to the Vice President of Student Affairs; Paul Mendoza, Director Accounting & Reporting Services - Student Affairs; Mary O'Mahoney, Director Student Recreation Center; Cynthia Otero, Interim Director Children's Center; Jamie Pacheco, Coordinator Veteran's Center; Debby Rodrigues, Coordinator Student Services Antelope Valley; Jason Watkins, Asst. Director Basic Needs/Services for Students with Disabilities
2:00-3:00	Enrollment Management Leadership (Admissions, EOP, Financial Aid, Registrar/Records, Systems, etc): Ben Perlado, Director of Admissions; Jennifer McCune, University Registrar; Natasha Harris, Senior Admissions Officer, Transfer Coordinator; Veronica Bethea Amey, Assistant Registrar; Steve Walsh, Director, Educational Opportunity Program (EOP); Tommy Holiwell, Director, Enrollment Management Systems; Chad Morris, Director of Financial Aid; Darius Riggins, Director of University Outreach; Jesse Quintanilla, Director, Talent Search; Omar Correa, Director, College Assistance Migrant Programs (CAMP); Dr. Charlene Hu, Senior Director for Student Programs

3:00-4:30	Shadow/observe Academic Advisors: 3:00-3:30 pm - Advisor 1: Adriana Sixtos (A&H) <i>calendar invite received - w/Amber Rose</i> ; 3:00-3:30 pm - Advisor 2: (BPA) Belen Mendiola - <i>calendar invite set w/KG</i> ; 3:45-4:00 pm - Advisor 3: (NSME) Anayeli Gomez-Navarro <i>calendar invite received - w/Amber Rose</i> ; 3:30-4:00 pm - Advisor 4: (SSE) Karen Ziegler-Lopez - <i>calendar invite set w/KG</i> ; 4:00-4:30 pm - Advisor 5: Jisel Silva Cornejo (AARC) <i>calendar invite received - w/Amber Rose</i> ; 4:00-4:30 pm - Advisor 6: Lea Antone (Antelope Valley) <i>calendar invite received - w/KG</i>
4:00-5:00	Steering Committee End of Day Check-in: InsideTrack team along with CSUB Steering Committee meet to recap the day+ share updates Participants: Debra Jackson, Luis Vega, Ilaria Pesco, Dwayne Cantrell and School Associate Deans
THURSDAY, SEPTEMBER 17, 2020	
8:30-9:00	Steering Committee Check-In: InsideTrack team along with CSUB Steering Committee meet to discuss the agenda for the day+ share updates Participants: Debra Jackson - Interim AVP for Academic Affairs, Dean of Academic Programs
9:00-10:00	Academic Support and Student Services Committee: Gladys Gillam, AH Rep; Jing Wang, BPA Rep; Charles Lam, NSME Rep; Elaine Correa, SSE Rep; Antje Lauer, At large Rep; Jeremy Woods, At large Rep; Amanda Grombly, Library rep; Belen Mendiola, SSP rep; Hilda Niebla, Staff rep; Luis Vega, Interim Associate Dean, Grad and Undergrad Studies; Dwayne Cantrell, AVP Enrollment Management; Markel Quarles, AVP Student Affairs; Ilaria Pesco, AVP Student Success; Stephanie Magana, ASI rep
10:00-10:15	Break
10:15-11:15	Academic support programs (ie. tutoring, writing center, etc): Jacob Whitaker, Coordinator, Tutoring and Supplemental Instruction; Dr. Kim Flachmann, Writing Centers, Reading Institute; Melisa Medina Cruz - Kegley Center for Student Success Assistant Director; Adriana Sixtos - A&H Tutoring Center Coordinator; Jaimi Paschal - NSME Advising Coordinator; Yvette Morones - SSE Advising Coordinator
11:15-12:00	Institutional Research, Planning & Assessment (IRPA): Kris Krishnan, Assistant Vice President IRPA; Jun-Ying Mao, Research Associate
12:00-12:45	[Lunch]
12:45-1:45	Advising for Special Populations: Melisa Medina Cruz - Kegley Center for Student Success Assistant Director; Melissa Bowen - KCSS Academic Advisor; Ivan Rojo - KCSS Academic Advisor; Tianyu Bao - KCSS Academic Advisor; Daniela Guardado - KCSS Academic Advisor; Andrew Dickerson - KCSS Academic Advisor; Jamie Pacheco - Veteran Center Coordinator; Raushel Salyards - Extended Education and Global Outreach Academic Advisor; Dalia Ramirez - Extended Education and Global Outreach Academic Advisor; Denise Romero - Helen Louise Hawk Honors Program Advisor; Michael
1:45-2:45	Academic Operations: Lisa Zuzarte - Director; Diane Wiggins - Administrative Analyst; Lilia Flores - Administrative Analyst; Kelly Dozier - Administrative Support Assistant
3:00-4:00	Student Interviews - invites from Ilaria: 2:30-2:50pm - Student 1: Danielle Coryell w/Amber Rose (661-972-6665) Dmurrillo6@csub.edu; 2:30-2:50pm - Student 2: Linda Hernandez w/KG (phone 661-586-6335) Iramirez@csub.edu; 2:50-3:10pm - Student 3: Gabriel Rodriguez w/Amber Rose (Phone - 360-513-4465); 2:50-3:10pm - Student 4: Frankie De La Pena w/KG (Zoom - asi-finance@csub.edu); 3:10-3:30pm - Student 5: Cedric Brooks w/KG (Zoom - Cbrooks11@csub.edu); 3:10-3:30pm - Student 6: Jacob Richardson w/Amber Rose (zoom - asi-transfer@csub.edu); 3:30-3:50pm - Student 7: Desiree Lorelli w/Amber Rose (Zoom - dlorelli@csub.edu); 3:30-3:50pm - Student 8: Zachary Maloney w/KG (Zoom - Zmaloney@csub.edu)
4:00-4:30	Steering Committee End of Day Check-in: InsideTrack team along with CSUB Steering Committee meet to recap the day+ share updates Participants: Debra Jackson, Luis Vega, Ilaria Pesco, Dwayne Cantrell and Kris Krishnan

FRIDAY, SEPTEMBER 18, 2020

8:30-9:00	Steering Committee Check-In: InsideTrack team along with CSUB Steering Committee meet to discuss the agenda for the day+ share updates Participants: Debra Jackson - Interim AVP for Academic Affairs, Dean of Academic Programs
9:00-10:00	Academic Advising and Resource Center: Denise Romero - AARC Coordinator; Misty Croney - SAP/ Probation Advisor; Jisel Silva-Cornejo - SAP/Probation Advisor; Fatima Ramos - Undeclared Academic Advisor
10:00-11:00	Academic Advisory Assesmbly (AAA): Maria Espinoza, ASI VP University Affairs; Allie Page, Director A & H; Serenity Sanchez, Director BPA; Parmbir Sidhu, Director NSME; Geena Olague, Director SSE; Jacob Richardson, Director Transfer Students; Jaime Duran, Director Graduate Student; OPEN, Director CSUB AV
11:00-11:45	School Deans and Associate Deans: Bob Frakes, A&H Dean; Liora Gubkin, A&H Associate Dean; Angappa Gunasekaran, BPA Dean; Seung Bach, BPA Associate Dean; Kathleen Madden, NSME Dean; Todd McBride, NSME Associate Dean; James Rodriguez, SSE Dean; Tanya Boone-Holladay, SSE Associate Dean
12:00-12:30	Steering Committee End of Day Check-in: InsideTrack team along with CSUB Steering Committee meet to recap the day+ share updates Participants: All team members

Appendix B

Glossary of terms

ADKAR: ADKAR is Prosci's model of individual change. ADKAR stands for:

Awareness of the need for change

Desire to support the change

Knowledge of how to change

Ability to demonstrate new skills and behaviors

Reinforcement to make the change work

CSUB: California State University, Bakersfield

KSABs: Knowledge, Skills, Attitudes, and Beliefs

Prosci: "Founded in 1994, Prosci is a change management firm focused on helping individuals and organizations build change management capabilities. Best practices research acts as the foundation for Prosci's world-renowned change management training programs and tools, including the Prosci ADKAR" Model. Prosci has certified over 30,000 change leaders worldwide through the Prosci Change Management Certification program."¹³

Appendix C

Document Review List

Retention Rates, First-Time Full-Time Freshmen Cohort
CSUB NSME Advising Framework
CSUB SSE Advising Framework
CSUB AH Advising Framework
CSUB BPA Advising Framework

Reminder/Confirmation Email
Schedule Your Appointment
Sample Student Communications
No show appointment letter

Strategic Plan_Overview <https://drive.google.com/drive/folders/11uhvKc9libnaILVAIMFKOclcPD3KbTfX>
CSU B Advising Organizational Chart <https://drive.google.com/drive/folders/1iCVkDhOKqdLHIsMhLIQcU-FoH2xrOjtE>
AcademicAffairsOrg Chart <https://drive.google.com/drive/folders/1iCVkDhOKqdLHIsMhLIQcU-FoH2xrOjtE>

CSUB Freshmen Runner Rundown Agenda.pdf
CSUB Freshmen Virtual Runner Rundown Agenda.pdf
Fall 2020 Runner Rundown Registration Instructions.pdf
Fall 2020 New Student Orientation Evaluation Results.pdf
Email from Orientation Coordinator.pdf
Fall 2020 Orientation PS Checklists.docx
CSUB Transfer Runner Rundown.pdf
CSUB Transfer Virtual Runner Rundown Agenda.pdf
Fall 2019 New Student Orientation Evaluation Results.pdf

ReadyToAdvise_QRG_102918.pdf
Business Administration Concentration List.docx
Course Pre-requisites.docx
Copy of New Advisor Training Guide.xlsx
Professional Advisor Training Materials.pdf
Be Prepared for Transfer Advising.pdf
Calling students.docx
Answering the Phone.docx
SSE Advising Communication for New Staff at a glance.docx
Art Careers.pdf
Career opportunities in arts and humanities.pdf
Communications Careers.pdf
English Careers.pdf
History Careers.pdf
Languages Careers.pdf
Music Careers.pdf
Philosophy Careers.pdf
Religious Studies.pdf
Theater Careers.pdf

EDTE 3000 Early Field Experience Waiver
Single Subject Credential.pdf
Social Science Outline.pdf
How to Apply Online for Graduation.pdf
Signing-into-Zoom.pdf
Student Financial Responsibility Guide.pdf
Zoom---Joining-a-Meeting.pdf
Freshmen Welcome Packet_2020-2021.pdf
Transfer Welcome Packet_2020-2021.pdf
Course Registration Worksheet.pdf
Student-Athlete Advising Registration Sheet1.pdf

Appendix D

Educational Landscape/Theory

INTRODUCTION TO EDUCATIONAL THEORY

This section outlines the educational theory and research that inform InsideTrack's coaching methodology and capacity building programs. InsideTrack's coaching methodology is based on over 10 years of experience coaching students and on robust internal and external research on student and institutional success.

SOLUTIONS FOR TODAY'S STUDENTS

Industry understanding of how to support students has changed substantially in the past 20 years. In a February 2015 article published in the *Stanford Social Innovation Review* entitled "Rethinking How Students Succeed," researchers highlight that shift in understanding:¹⁴

Twenty years ago, conventional wisdom held that cognitive ability displayed by mastery of core academic subjects paved the way to success in school, career, and life. Today, we know better. Success comes when cognitive skills work in tandem with so-called soft skills like self-control, persistence, social awareness, relationship development, and self-awareness. Practitioners and researchers typically frame their discussions of these characteristics around either social and emotional skills, or academic attitudes and behaviors. Each charts a separate path of inquiry and classroom practice. Yet they share a common destination: developing students whose mastery of non-cognitive skills, strategies, attitudes, mindsets, and behaviors enhances their academic and life success.

According to a 2014 article called "Academic Tenacity" by Carol Dweck, Greg Walton and Geoffrey Cohen,¹⁵ this approach to supporting students is especially important for those from underserved communities.

Psychological factors - often called motivational or noncognitive factors - can matter even more than cognitive factors for students' academic performance. These may include students' beliefs about themselves, their feelings about school, or their habits of self-control. Educators, psychologists, and even economists recognize the importance of noncognitive factors in achievement both in school and in the labor market. These factors also offer promising levers for raising the achievement of underprivileged children and, ultimately, closing achievement gaps based on race and income.

The traditional role of an academic advisor has not been to develop students, but instead is to help reduce risk to the student and to the university by:

- Informing students of important policies and deadlines
- Helping students understand their options and the consequences of their decisions
- Helping students understand academic policies such as degree audits, course selection, and how to stay on track academically so they can graduate

While these activities are important, they do not fully encompass the type of support that many of today's students need, whether traditional or post-traditional. Additionally, many advising functions can now be supplemented by technology or automation, reducing the number of manual tasks, such as degree audits, that academic advisors need to perform.

The ability to work with students in-depth on noncognitive development is the primary differentiator between coaching and traditional advising. The goal of the coaching relationship is to increase students' ability to effectively take advantage of the resources and opportunities available, both within the college and beyond.

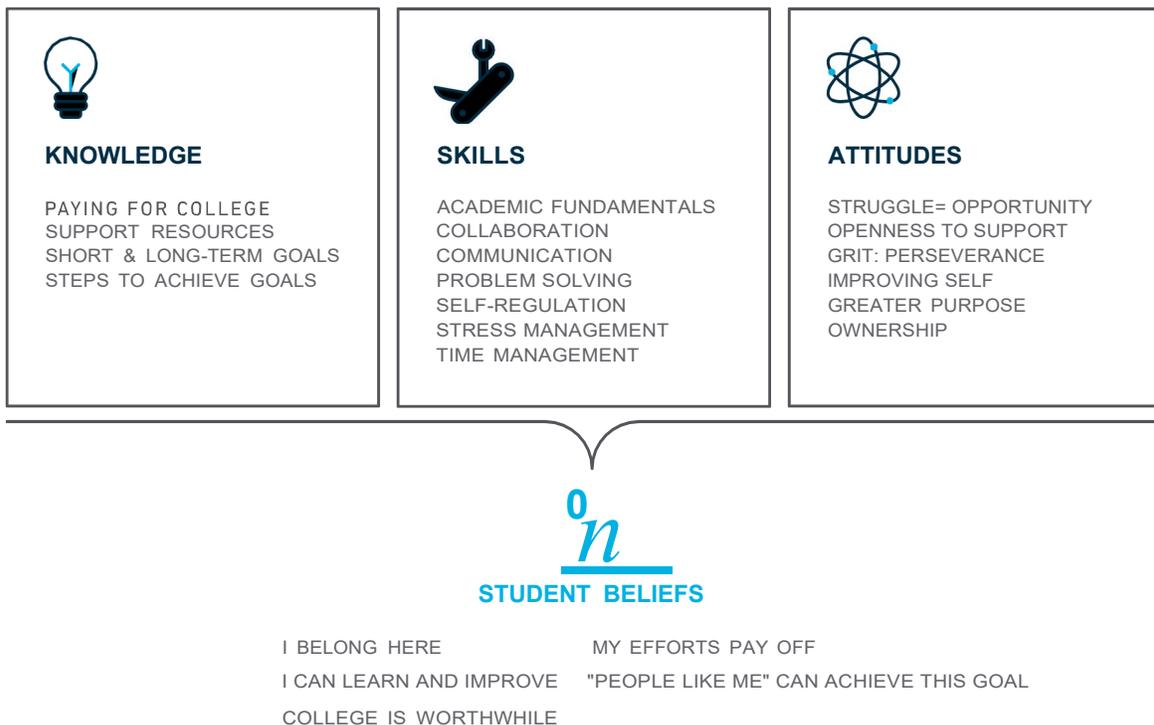
Many institutions are carefully considering how to incorporate noncognitive skill development into their existing staff and structures or building coaching centers on campus.

HOW INSIDETRACK INCORPORATES THEORY INTO REAL-WORLD SOLUTIONS

InsideTrack is on the forefront of applying these learnings by partnering with institutions in order to provide holistic and nonacademic support to students. InsideTrack supports university staff through a comprehensive and customizable combination of coaching, analytics, technology and consulting. Studies have shown that institutions that partner with InsideTrack improve student enrollment, persistence and career readiness.¹⁶ Our partners also develop more agile and effective approaches to ensure consistency and quality in all of their student-facing functions.

InsideTrack has developed a coaching model that can be used to help students develop the fundamental knowledge, skills, attitudes and beliefs (KSABs) they need to be successful (see graphic below). The model is particularly relevant and effective for working with students who are from traditionally underserved communities.

KNOWLEDGE, SKILLS, ATTITUDES AND BELIEFS



The InsideTrack model of coaching is a proven method to improve student outcomes. In a landmark paper published in AERA's *Educational Evaluation and Policy Analysis*, "The Effects of Student Coaching in College: An Evaluation of a Randomized Experiment in Student Advising," Eric Bettinger, associate professor of economics at the Stanford Graduate School of Business, led an independent review of controlled studies on the effects of InsideTrack coaching.¹⁷ According to the study conducted by the Stanford research team:

Over the course of two separate school years, InsideTrack, a student coaching service, provided coaching to students from public, private, and proprietary universities. Most of the participating students were non-traditional college students enrolled in degree programs. The participating universities and InsideTrack randomly assigned students to be coached. The coach contacted students regularly to develop a clear vision of their goals, to guide them in connecting their daily activities to their long-term goals, and to support them in building skills, including time management, self-advocacy, and study skills. Students who were randomly assigned to a coach were more likely to persist during the treatment period, and were more likely to be attending the university one year after the coaching had ended. Coaching also proved a more cost-effective method of achieving retention and completion gains when compared to previously studied interventions such as increased financial aid.

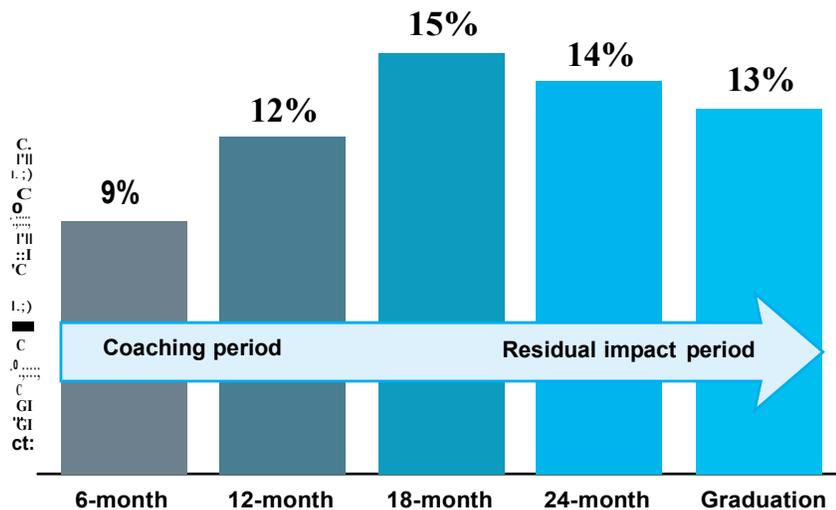
CSUB and its students stand to gain a great deal from embracing a model of student support that assumes nothing about the KSABs of the students, but rather assesses each student's needs and provides tailored support in order to help each student achieve his or her personal vision of a life made better by the attainment of a degree.

INSIDETRACK'S RESULTS

For more than a decade, InsideTrack conducted comparison studies between statistically balanced coached and control groups to find positive outcomes in retention, engagement, school satisfaction and graduation. The benefits of coaching have been found to carry into other areas of students' lives, increasing their feelings of effectiveness, allowing them to better manage their commitments and decreasing stress.

InsideTrack coaching consistently improves retention and graduation across demographic bands. The study led by Bettinger at Stanford found that coaching increased retention and graduation of a coached group by as much as 15 percent.¹⁸ The U.S. Department of Education's What Works Clearinghouse then reviewed Bettinger's analysis of InsideTrack's methodology, citing that it included "well-executed randomized controlled trials with low attrition."¹⁹

DATA SHOWS THE IMPACT OF COACHING ON RETENTION AND GRADUATION RATES OVER TIME



An Evaluation of a Randomized Experiment in Student Advising Print
Published in *Educational Evaluation and Policy Analysis*, vol. 42, no. 7 October 2013
Eric P. Bettinger and Rachel B. Baker

Our clients report that InsideTrack's coaching for students has helped:

- Drive online student persistence and success
- Improve retention rates for returning students
- Improve return rates, even for students out of school for several terms
- Improve student engagement and satisfaction
- Improve outcomes for students in developmental courses
- Enhance the success of traditionally underrepresented students
- Improve retention of students entering with existing transfer credits
- Increase credits attempted and proportion completed
- Increase the use of other student services (tutoring, academic advising, etc.)
- Improve retention of students throughout the student life cycle

PERSISTENCE AND COMPLETION RESULTS	ENGAGEMENT AND ISSUE RESOLUTION RESULTS
<ul style="list-style-type: none"> Improved retention by 12% and graduation by 13% in a peer-reviewed study of 10,000 adult students Increased first-year retention of African-American and Latino online students by 21% at a major for-profit university Maintained 90%+ retention as enrollment grew from 1,500 to 10,000 at a public online university 	<ul style="list-style-type: none"> Grew enrollment by 20% while increasing retention and completion at a private adult-focused university Improved enrollment conversion by 46% at a major public online university Increased Net Promoter Score®(NPS) by 25% at a major for-profit university 95% of graduate students receiving career coaching at an Ivy League university rated it as "valuable" Increased student use of support resources by an average of 20% at a public and private university Increased student satisfaction by 15% at a large public university FAFSA completion rates increased by 4.4% at a public and private university On-time resolution of holds on account increased by 9% at a large public university

EARLY COACHING= MAXIMUM IMPACT

Engaging with students at the right time and providing more care to students who are less prepared to be successful are critical components of providing quality, impactful student support. Every student is unique, but there are indicators of who needs the most support and of when they will need it.

As part of the initiative to provide timely support to students, InsideTrack has partnered with university admissions and enrollment offices to build the capacity of these departments to successfully convert prospects to students. Prospective student coaching consultation and coaching services focus on providing recommendations and implementing key best practices for the student enrollment journey. The efforts of these partnerships are informed through best practices from InsideTrack's continued work with other institutions, InsideTrack coach and manager insights from their experience in working directly with student prospects, proven practices based on InsideTrack analysis and research, and information gathered from trusted industry publications and relevant articles.

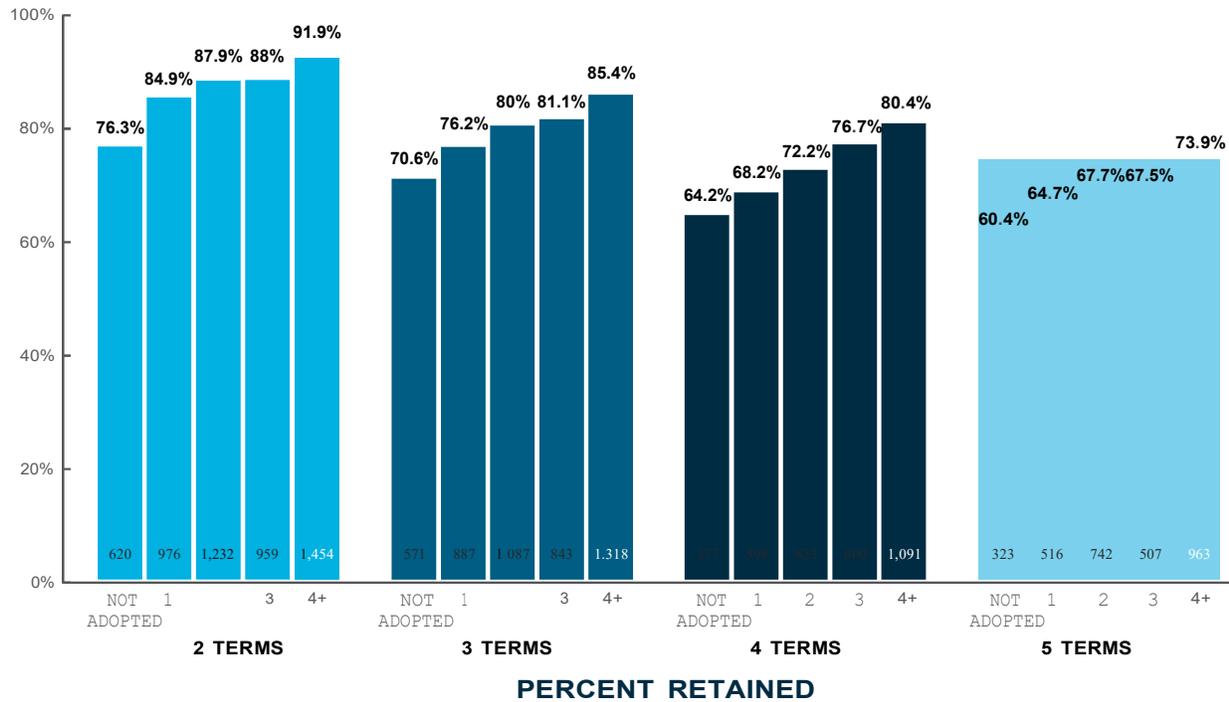
The most critical period of time for additional student support is when students are new to the university, especially from registration through their first three to six months of classes. This period is critical because students receive overwhelming amounts of information and need support in understanding, navigating and digesting it; they often have feelings of anxiety and self-doubt; they might need support and to connect with services to improve their computer skills; and they may struggle with feelings of not belonging. Providing high-quality support during this time pays dividends on student retention.

With many partners, InsideTrack has measured the long-term impact and benefits of proactive coaching. Graphic 1 illustrates term-to-term retention for post-traditional students at a university using InsideTrack Success Coaches. To the far right you'll see that those who did not adopt coaching retained into Term 5 at a rate of 60 percent, while those who had just one meeting retained at 64.7 percent and those with four or more meetings retained at a rate of almost 74 percent.

Additionally, InsideTrack data shows that starting the coaching process earlier has a positive impact on retention. In one study below, InsideTrack followed two groups of post-traditional students—those who received outreach in the first week of classes and those who received it in the second week. The students in the first group always retained at a higher percentage (See Graphic 2).

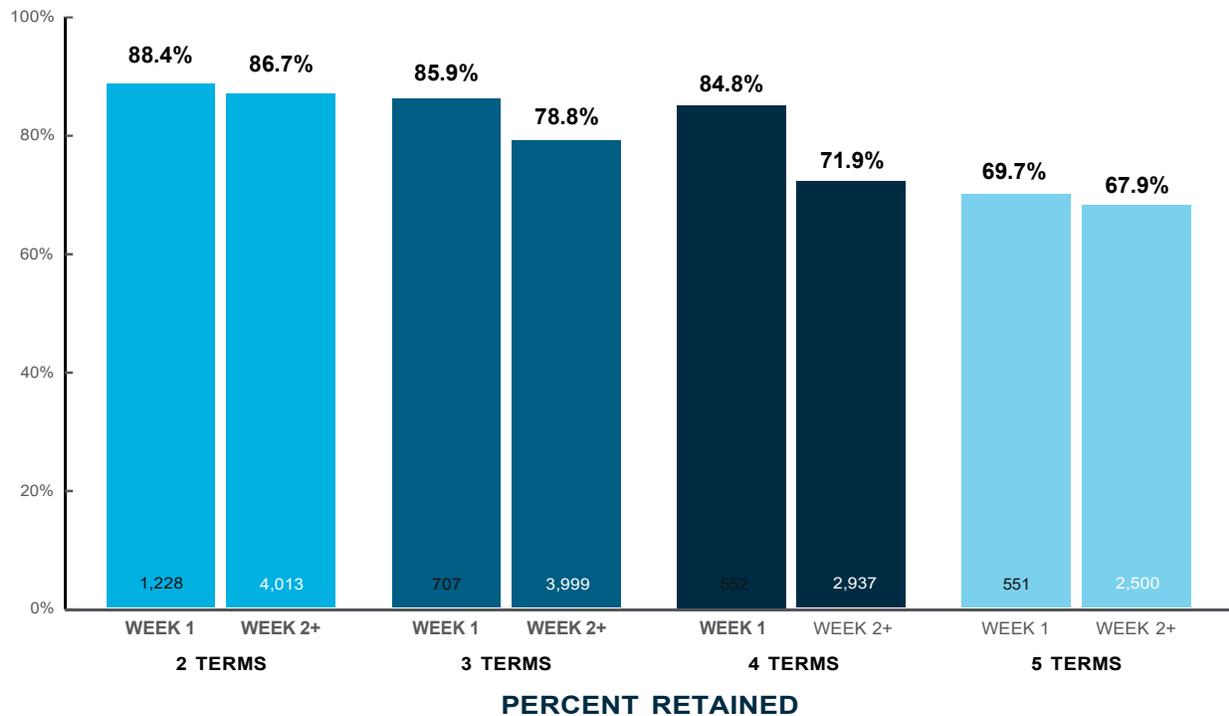
**GRAPHIC 1: THE CORRELATION BETWEEN COACHING ADOPTION AND RETENTION PERSISTS PAST WHEN COACHING ENDS
TERM RETENTION BY NEW STUDENT ADOPTION (NSA)**

Coached students in cohorts Fall I 2012 through Fall II 2013 (n = 5242)



**GRAPHIC 2: EARLY OUTREACH IS CORRELATED WITH HIGHER RETENTION INTO TERM 2 AND SUBSEQUENT TERMS
TERM RETENTION BY WEEK IN TERMS OF OUTREACH**

Coached students in cohorts Fall I 2012 through Fall II 2013 (n = 5242)



INSIDETRACK'S EQUITY IMPACT

InsideTrack is committed to approaching our work through an equity lens, which chiefly benefits the diverse students we serve. This work is an ongoing journey, as we recognize we are never completely done understanding people with different identities and how they navigate the world. In 2017, InsideTrack collaborated with EqualityWorks, NW on a four-hour training around diversity and equity to provide tools to examine one's own positionality and thus allow InsideTrack to better serve students with varying and differing identities. InsideTrack's ultimate goal is to continue to build skill and confidence in working with students and clients, enabling our organization to better connect with and understand the needs of more of the people we serve.

InsideTrack believes that *all* students deserve the best student services and that everyone can benefit from coaching, whether they are considered "at risk" or not. but with limited resources it's important to know which interventions can support significant progress for student populations most in need. InsideTrack has observed that underserved students are often less likely to reach out for support when they need it because the act of asking for help signifies to themselves that they do not know something they feel they should. This, in turn, impacts students' sense of belonging.

Consistent, proactive support and strong relationships are essential to assisting students in taking full advantage of the resources available through the institution. InsideTrack's coaching methodologies are focused on building a strong foundation of trust. Students are then more likely to share when they are really struggling and might feel too embarrassed to reach out. The InsideTrack coaching methodologies are about understanding each individual's motivation, goals, successes, and potential obstacles in order to create a proactive plan for success. This focus provides the consistent engagement, relationships and KSAB development critical to student success. When coaching is provided to historically underserved student populations, we see that it can improve the student's sense of belonging and belief in their abilities as a student. Graphics 3, 4 and 5 show the benefit of proactive retention coaching for low-income students and students of color.

Coaching has been shown to improve retention of Pell-eligible students by 16 percent over historical retention benchmarks. It has a positive impact on both traditional and adult minority students (See Graphic 4).

GRAPHIC 3: SIGNIFICANTLY IMPROVE OUTCOMES FOR UNDERREPRESENTED STUDENTS

With support from InsideTrack, Cal State University Monterey Bay increased first-year retention of Latinx, first-generation and low-income students, while increasing the proportion of enrollment represented by these student groups.

PERCENT FIRST-YEAR STUDENT RETENTION (2006 - 2011)

	2006	2007	2008	2009	2010	2011	Increase 2006 - 2011	
							Points	Percent
Latinx	65%	70%	72%	78%	84%	81%	16	25%
First Generation	52%	69%	72%	75%	79%	81%	29	50%
Low Income	69%	70%	74%	75%	79%	83%	14	20%
Overall	65%	67%	71%	76%	78%	79%	14	22%

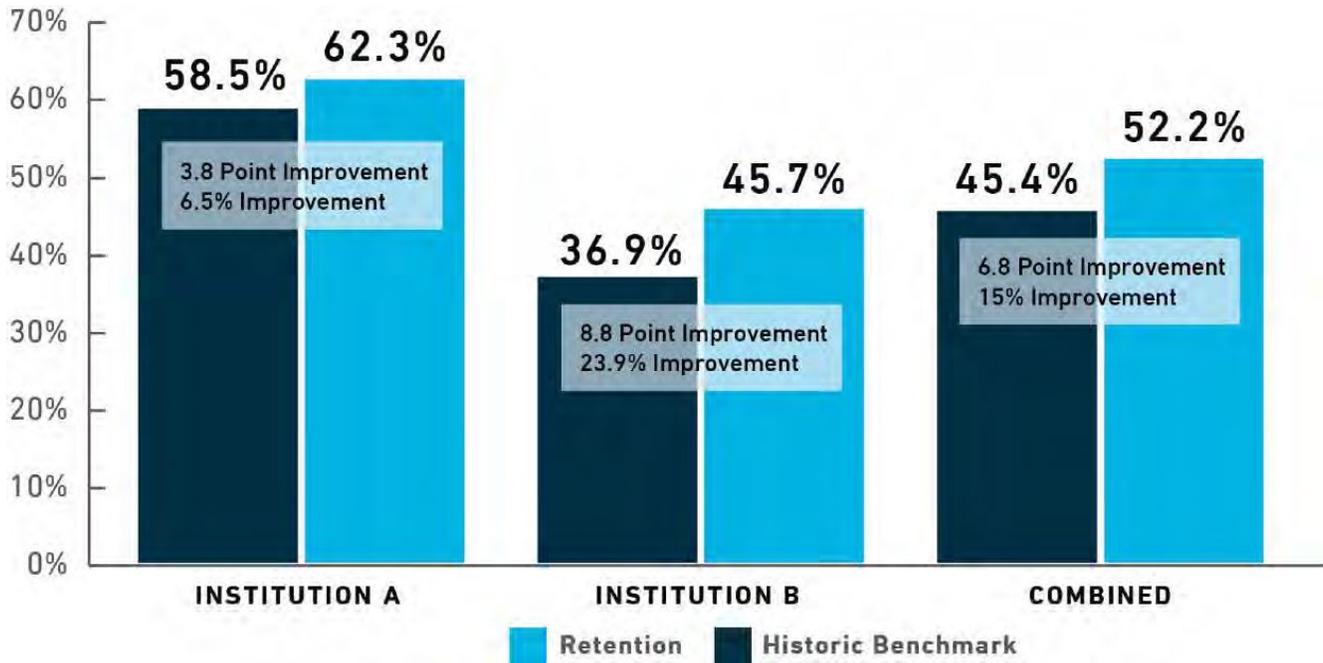
PERCENT OF FALL ENROLLMENT (2006 VS 2011)

	2006	2011	Increase 2006 - 2011	
			Points	Percent
Latinx	29%	32%	3	10%
First Generation	39%	51%	12	31%
Low Income	27%	33%	6	22%

Source: CSUMB University Factbook, CSUMB Office of Institutional Assessment and Research

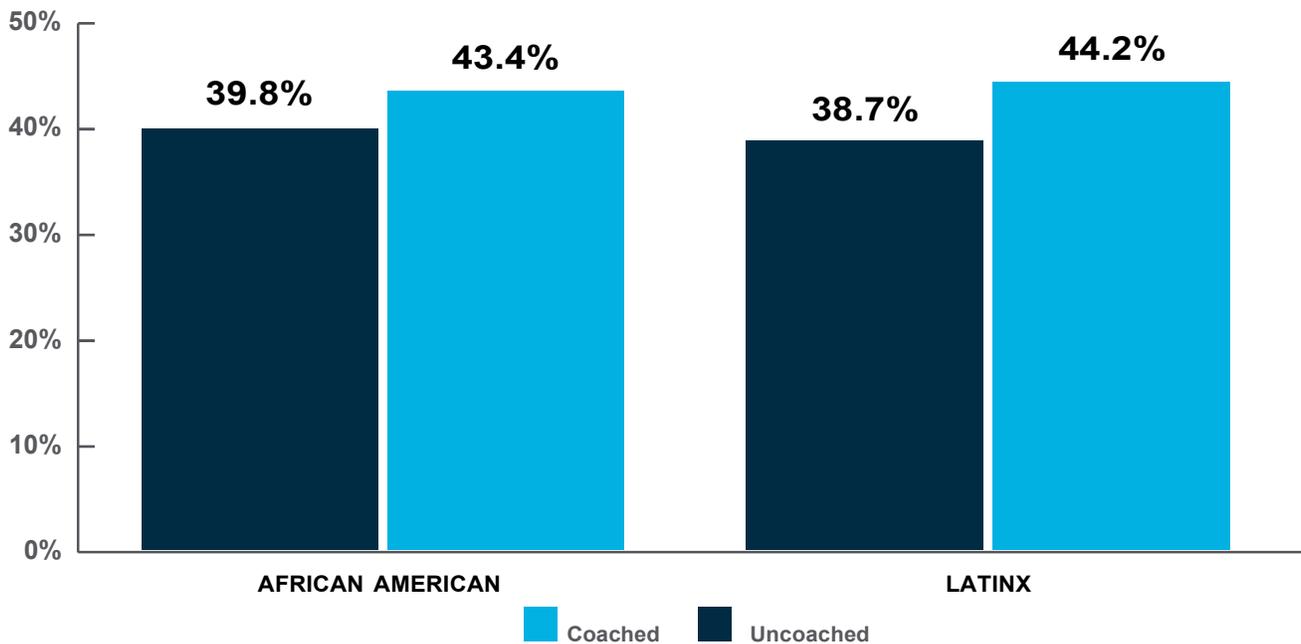
GRAPHIC 4: IMPROVE PERSISTENCE OF PELL-ELIGIBLE STUDENTS ENROLLED IN BOTH 4-YEAR AND 2-YEAR PROGRAMS

Institution A: N= 493 Student Retention Retained: N= 463 Historic Benchmark Students Retained. Institution B: N= 560 Student Retention Retained: N= 452 Historic Benchmark Students Retained. Combined: N= 1,053 Student Retention Retained: N= 915 Historic Benchmark Students Retained.



GRAPHIC 5: COACHING INCREASES RETENTION IN MINORITY STUDENTS ATTENDING NONPROFIT TRADITIONAL AND ADULT PROGRAMS

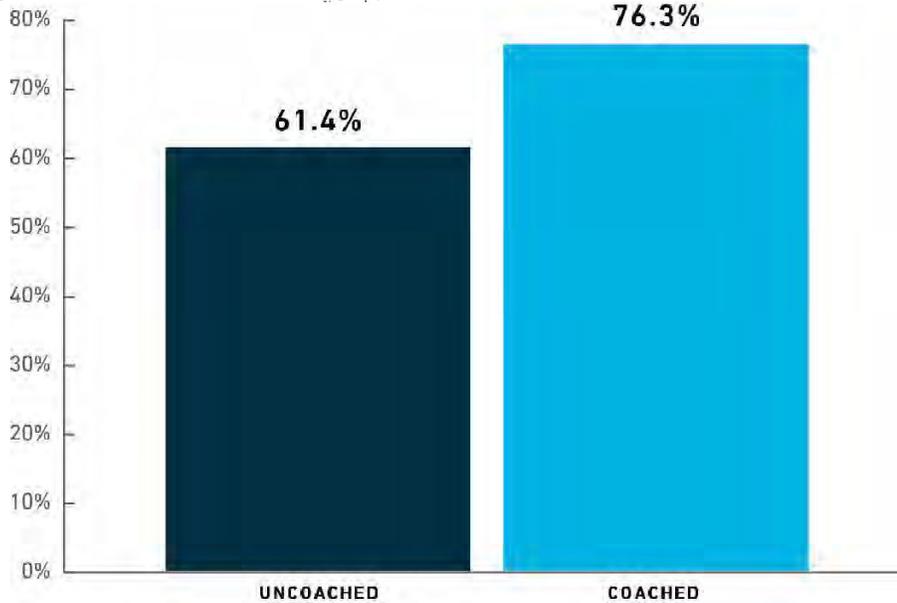
N = 885, demographically balanced coached and control groups. Retention= Fall-to-Fall for traditional. third term for adult



In a controlled study comparing year-to-year retention of freshmen at a midsize public university, African American students who received coaching showed a 24 percent increase in retention compared to a demographically balanced randomized control group. The retention gains for African American students who receive InsideTrack coaching appear to be as good or better than for the general student population (See Graphic 6).

GRAPHIC 6: COACHING INCREASES 1ST YEAR RETENTION OF AFRICAN AMERICAN STUDENTS AT A LARGE PUBLIC UNIVERSITY

N = 116, demographically balanced coached and uncoached groups. Retention= Fall-to-Fall



TAKING A STUDENT-CENTERED APPROACH TO THE APPLICATION OF COACHING

Not all students will need intensive, proactive coaching for as long as others will. Through careful assessment and measurement of performance, students might move on from coaching in as few as one or two terms, although many may need it up to four or five terms, and some may benefit from coaching for the entirety of their academic careers. Some of InsideTrack's partner institutions have even found that it is not necessary to coach all students because some students will succeed and some will fail, regardless of coaching. At the beginning of a student's career, it is important to assess and tailor the approach.

The strategies we adopt to communicate with students are important considerations in a student-centered approach to coaching. Communication methods can be tailored to meet diverse learning styles and to improve student engagement and data management (See Graphic 7). Adaptive and continuously enhanced through our work, the InsideTrack uCoach®Technology and Analytics Platform features multichannel communication and interactive content as a means of empowering coaches to engage students through a broad range of communication channels, including voice, video, email, text, mobile apps and more.

Additionally, embracing a multichannel communication strategy has proven to positively affect a variety of student outcomes, including driving initial engagement with infrequent communicators, increasing the frequency of interactions between coaches and students, and supporting a more impactful student-coach partnership (See Graphic 8).

DEDICATION TO SUSTAINABLE CHANGE

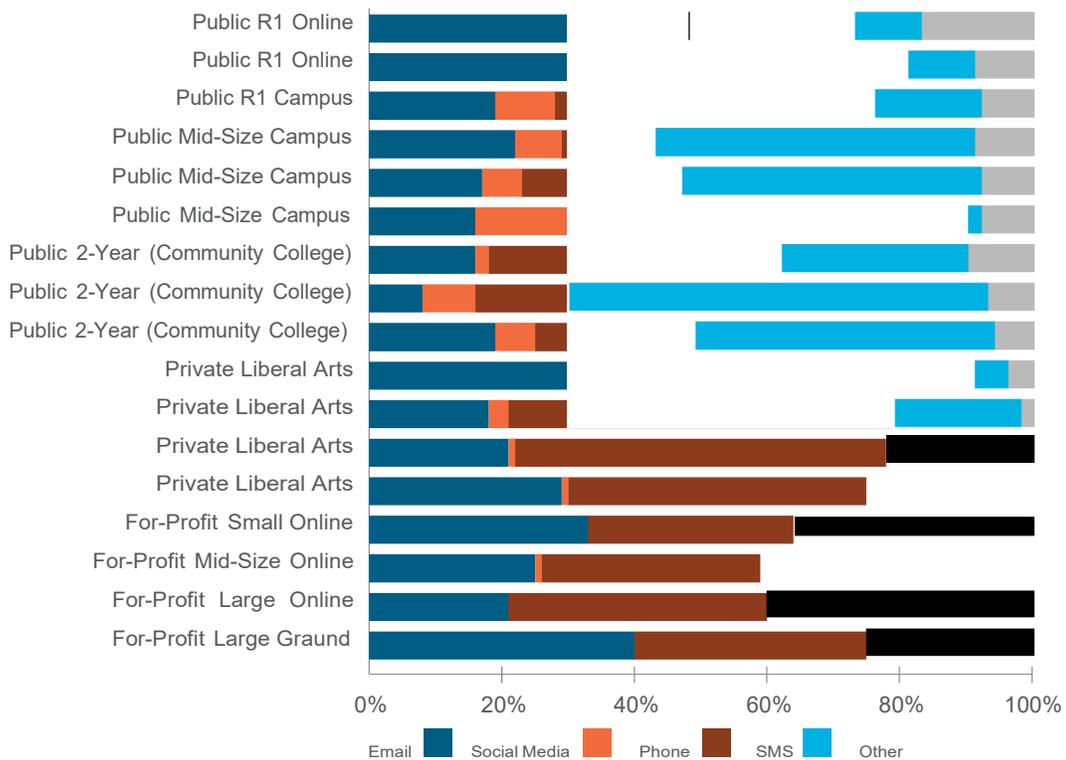
InsideTrack shares its partners' dedication to enhancing the student experience. We also understand that ensuring the success and sustainability of a capacity building initiative entails a significant commitment of time and resources, from cultivating stakeholder buy-in to empowering individual action and reinforcing progress over time. We have committed ourselves to incorporating the latest developments in organizational change science into our efforts to support your success.

InsideTrack's professionals are certified by Prosci®, a firm whose methodologies are employed by the largest corporations, governments, nonprofit organizations and academic institutions in the world to help them change more successfully. Based on decades of research and practical application, Prosci's approach is widely recognized as one of the most effective for driving individual and organizational progress.

Prosci's research with more than 1,000 organizations demonstrates that projects undertaken in conjunction with an effective strategy for achieving change are **six times more likely to succeed**.²⁰

Systemic change not only requires changing systems and processes, but also requires supporting people - managers and staff at all levels - to build their awareness, desire and knowledge of what is and is not changing, and developing and reinforcing their ability to execute the change.²⁷ InsideTrack seeks to leverage our expertise to ensure that student success initiatives deliver meaningful and lasting results.

GRAPHIC 7: PERCENTAGE OF FIRST-YEAR STUDENT COACH INTERACTIONS BY COMMUNICATION MODALITY



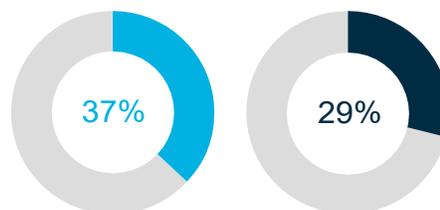
GRAPHIC 8: ADVANTAGES OF MULTICHANNEL OUTREACH

Coaches who use a multichannel approach engage students more deeply in coaching

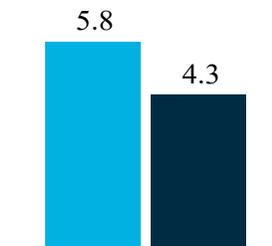
Coaching engagement for all students who received coaching at a single institution, N = 6,683

■ SMS Users ■ Non Users

4+ COACHING MEETINGS IN A SINGLE TERM



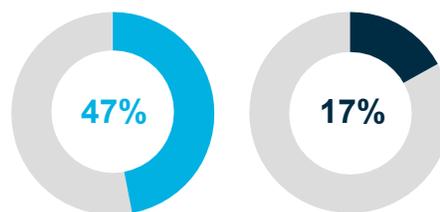
AVERAGE NUMBER OF COACHING MEETINGS PER TERM



A multichannel approach is especially effective for engaging the most difficult to reach students

Coaches who use SMS are more likely to eventually establish contact with unresponsive students before the end of term (1,704 out of 6,683 unreachable during weeks 0-3)

1+ COACHING MEETINGS IN A SINGLE TERM



3.6X

More success at reaching unresponsive students when Coaches used SMS to establish contact

Appendix E

Your partner in improving student outcomes

WE UNDERSTAND THE CHALLENGES HIGHER EDUCATION LEADERS ARE FACING.



THERE ARE MULTIPLE WAYS TO TACKLE THE CHALLENGES OF SUPPORTING TODAY'S LEARNERS. WE'LL HELP YOU FIND THE RIGHT APPROACH.

InsideTrack partners with institutions and other organizations to improve student **enrollment, persistence, completion and career readiness**. With an unwavering focus on enhancing student and institutional outcomes, we work with you and your team to identify program strengths, break through organizational silos, and create a more student-centered experience. A nonprofit member of the Strada Education Network, we offer partners access to the latest research and data as well as a comprehensive set of solutions that enhance the lifelong success of every learner.



BETTER OUTCOMES FOR EVERY TYPE OF LEARNER



Through our partnership with InsideTrack, we've been able to develop a coaching program that empowers students to achieve their full potential.

Maria Calzada, Interim Provost and Vice President for Academic Affairs at Loyola University New Orleans



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28%

**ENROLLMENT
YIELD INCREASE**

for online students at
Penn State World Campus



5.5%

INCREASE IN YIELD at
Old Dominion University



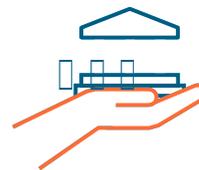
**33% INCREASE IN
RETENTION & GRADUATION**

for students in technical and vocational
programs in Minnesota's statewide system



Having InsideTrack as a strategic thought partner and source of expertise and capacity has enabled us to innovate more quickly, cost-effectively and with greater impact.

Dr. Renata Engel, Vice Provost for Online Education, Penn State



5 PERCENTAGE

point persistence increase
for traditional-aged
students at Loyola
University New Orleans



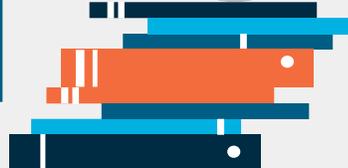
77% IMPROVEMENT

IN COMPLETION for first-gen and
low-income students at Ivy Tech
Community College



95% OF GRADS

agreed that career
support helped them
progress toward
their goals



Appendix F

Learning to Successfully Navigate Change

CHANGE LEADERSHIP

Your cheat sheet on the two most important concepts in change leadership, plus examples from institutions that are using change management principles to achieve organizational transformation.

THE APPROACH

InsideTrack's operations professionals are Prosci® Change Practitioners, an organization whose methodologies are employed by the largest corporations, governments, not-for-profit organizations and academic institutions in the world to help them change more successfully. Prosci's research with more than 1,000 organizations demonstrates that projects undertaken in conjunction with an effective strategy for achieving change are six times more likely to succeed. Based on decades of research and practical application, Prosci's approach is widely recognized as one of the most effective for driving individual and organizational progress.

CONCEPT #1: EFFECTIVE SPONSORSHIP IS KEY

Every successful change begins with active and visible support from leadership. These leader-advocates are your sponsors. When staff recognize that leadership is supportive of the change, and investing time and resources into achieving the change, you are more likely to get buy-in from all levels of your institution. Leverage your sponsors as champions of change.

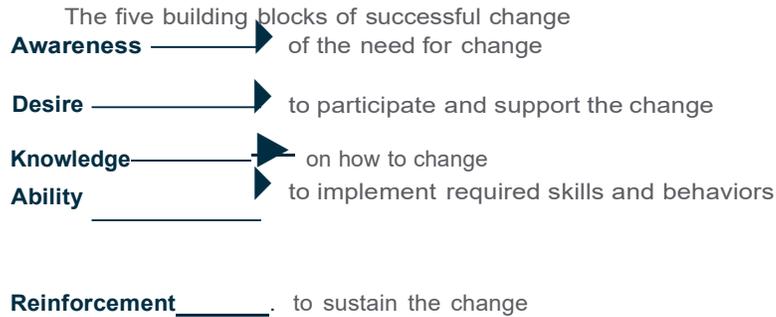
Here are the ABCs of Effective Sponsorship:

- Active and visible participation: Sponsors need to continually demonstrate their support for - and involvement in - the change
- Building support with peers and managers: Sponsors should gather an intentional group of managers and peers to advocate for the change, and provide feedback when necessary
- Communicating directly with employees: Sponsors should communicate their support for the change - including the reasons for the change, the impact it will have, and the risks of not changing - often, repeatedly and through multiple channels

CONCEPT #2: ORGANIZATIONS ARE MADE UP OF INDIVIDUALS - SO EVERY INDIVIDUAL NEEDS TO EMBRACE THE CHANGE

Every individual adopts change at their own pace. Most will have some kind of barrier they will need to overcome before they support and can successfully engage in the change. Remember, resistance is a natural response, and when change occurs in the workplace, it can bring on anxiety and insecurity. Make sure staff know "what's in it for me."

PROSCI®ADKAR®MODEL



HOW DO INSTITUTIONS SUCCESSFULLY NAVIGATE CHANGE? HERE ARE FOUR SCENARIOS THAT SHOW WHAT CHANGE LEADERSHIP LOOKS LIKE IN PRACTICE.

The Institution	Large four-year public institution	Adult-serving private institution	Private four-year institution	Public community college
The Change	Partnering with academic departments to improve retention by enabling students to choose their majors earlier	Moving to one unified technology platform for student support staff	Transferring more coaching program management and oversight to staff	Focusing on improving graduation rate of first-time, full-time students
The Challenge	Difficult to coordinate efforts across the organization	Adoption among staff is inconsistent	Inconsistent staff response; some are enthusiastic, some are concerned	Resistance is coming from the leadership level
Next Steps	Start a dialogue with faculty advocates by asking them, "What would this change look like in your department?"	Focus on Awareness and Desire by sitting down with each individual staff member to communicate that this platform exists to make their work easier	Explore the root cause of resistance with the individual and emphasize what the individual is doing well	Organize a retreat where everyone can learn about data to grow Awareness of the change and the risks of not undertaking this change

Appendix G

Seeing your school through the eyes of a student

GET YOUR STUDENT-FACING FUNCTIONS ON THE SAME PAGE

From initial contact through graduation day (and beyond), Student Journey Mapping provides a visual representation of a process that can be difficult to track - taking you on the exact journey your students experience and pinpointing changes needed. All of those insights add up to a fresh perspective on any roadblocks or barriers your students may face. You'll finish the mapping process with tangible actions you can use to create better outcomes, a deeper understanding of the student-facing functions at your institution, and new tools for better cross-functional collaboration.

TIPS TO MAKE STUDENT JOURNEY MAPPING A SUCCESS

<p>PLAN YOUR ITINERARY</p>	 <p>DETERMINE YOUR DESTINATION</p>
<p>Take as much time as you need: A lot can be done in a few hours - even more in an all-day session.</p>	<p>Successful journey mapping hinges on knowing what your map will cover. Sample student journeys that can benefit from mapping include: Acceptance to enrollment and Term 1 start to Term 2 registration.</p>
 <p>SEE THROUGH THE EYES OF YOUR STUDENTS</p>	 <p>ENJOY INSTITUTIONAL BENEFITS</p>
<p>To create a better student journey, you need to first understand the experience from the student's point of view: If I were taking an online course for the first time, what would I need to know? What is the complaint from students I hear most often?</p>	<p>What will you get out of your student journey mapping process? Benefits include: New insight into what the student needs to be successful and the opportunity to improve a process that students struggle with.</p>



SAMPLE STUDENT JOURNEY MAPPING SESSION

STEP
1

Gather different student-facing staff members to collaborate on your journey mapping process

STEP
2

Get out the whiteboard markers and post-its - this is a flexible and visual way show the student experience

STEP
3

List all student/staff communications - incoming and outgoing - including the channel being used (in-person meeting, email, phone call, text, letter, other)

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With all the communications now visible, look for duplication - and gaps. Where are the points where students seem to struggle the most?

cr, TE.o

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Analyze whether the communication is having the intended effect - including how it's impacting the student's relationship with your school.

STEP
5

Consider the delivery. Look for areas where the information, the timing and the channel could be changed to better the student experience.

STEP
6

When a student is handed off from one department to another, do they know who they need to speak with and why? When they go to a new office or department, are they prepared with the key background information they need?

STEP
8

Identify potential improvements and create next steps for putting them into action

Appendix H

Support Tailored for Today's Public Colleges and Universities

WE APPRECIATE THE CHALLENGES PUBLIC COLLEGE AND UNIVERSITY LEADERS FACE EVERY DAY ...

Developing a **SUCCESSFUL LONG-TERM RECRUITMENT STRATEGY** that factors in a shrinking high school graduate pool.

Enhancing **THE VALUE OF STUDENTS' EDUCATIONAL INVESTMENT** through enhanced career support.

Improving equity and **SUPPORTING BETTER OUTCOMES FOR ALL LEARNERS** with less public funding.

Investing in tailored support to keep **ONLINE LEARNERS ENGAGED AND CONNECTED.**

THERE ARE MULTIPLE WAYS TO TACKLE THE CHALLENGES OF SUPPORTING TODAY'S LEARNERS. WE'LL HELP YOU FIND THE RIGHT APPROACH.

With an unwavering focus on improving student outcomes, we work with you and your team to build on program strengths, break through organizational silos, and create a more student-centered experience that enhances the lifelong success of every learner. Our student support methodology is designed to uncover firsthand insights about your students' goals, challenges and journeys. Through training, consulting and direct student coaching, we help you put those insights into action. As a member of the nonprofit Strada Education Network, we have access to the latest research and data as well as a comprehensive set of solutions that address all aspects of student success.

FLIPPING THE SCRIPT: BECOMING A STUDENT-READY INSTITUTION

WHAT DOES THAT LOOK LIKE ON YOUR CAMPUS?



Staff who are trained and invested in supporting student success in every interaction



Student-facing departments that are mission-aligned and working together



A clear process for turning insights on the student experience into action

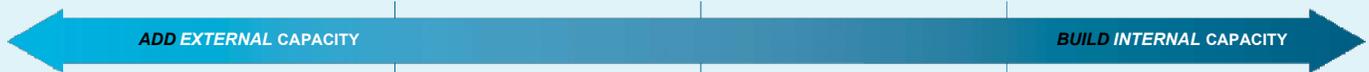


Improved outcomes and an excellent return on investment

A SPECTRUM OF SOLUTIONS

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STUDENT COACHING

Immediately increase student support capacity and improve outcomes while gathering firsthand feedback on the student experience.

DIAGNOSTICS

Gain insight and advantage through student journey mapping, capability assessment, competitive benchmarking and more.

TRAINING & CONSULTING

Build skills and knowledge, align resources and execute organizational change more effectively.

CAPACITY BUILDING

Build an effective, scalable student support infrastructure to drive sustainable improvement year after year.

PARTNERING WITH INSTITUTIONS TO IMPROVE STUDENT ENROLLMENT, PERSISTENCE, COMPLETION AND CAREER READINESS

<p>5.5 percentage point increase in yield and 18.7% higher first-year retention</p>	<p>10 to 15x return on investment on re-enrollment campaign across three campuses</p>	<p>Better supporting transfer students by building a joint coaching program with Northern Virginia Community College</p>



Deploying a coaching program in partnership with InsideTrack generated fast return on investment. In less than three years we recouped our costs, including the cost of hiring new staff.

Larry Abele, Provost Emeritus, Florida State University

Appendix I

Training & Consulting Programs

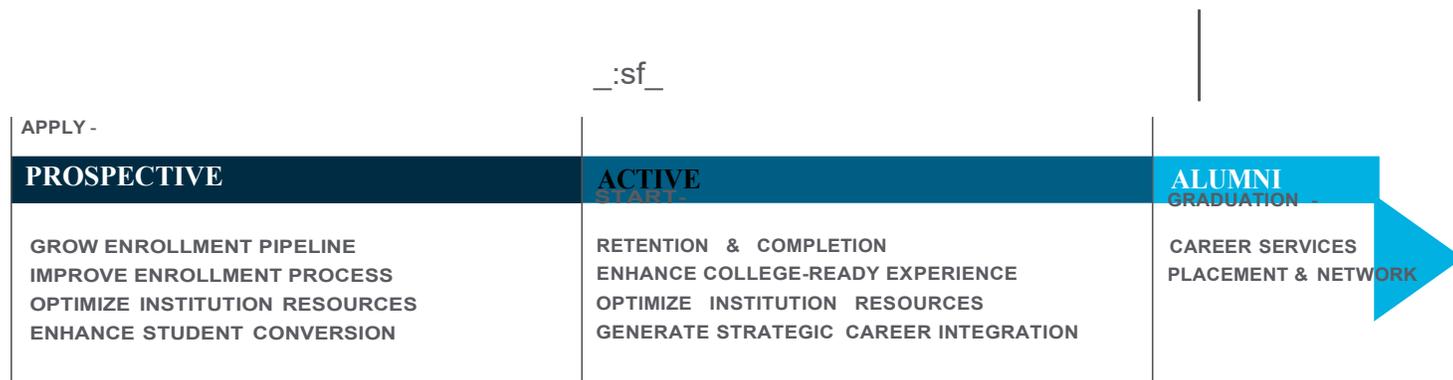
ENHANCING STUDENT SUPPORT ONE STEP AT A TIME

To a student, the first day of class marks a beginning. To you, it's a culmination. Before they can crack open a fresh notebook at the start of a new term, students receive critical guidance that supports them at every step, from inquiry through enrollment to reading a syllabus. Even students well into their college careers mark each milestone by navigating through touchpoints like registration, advising and financial aid.

Our professional services are designed to improve your program's outcomes at critical milestones throughout the student journey. We'll partner with you to ensure that each aspect of your support program propels students forward on the path to completion and career readiness. Institutions can choose to engage with InsideTrack's professional services through an integrated or a segmented model. InsideTrack Capacity Building offers an integrated model that encompasses multiple program functions at once. Through InsideTrack Training and Consulting, institutions can segment services and drill down into select functions.

INSIDETRACK TRAINING AND CONSULTING

Programs are customized to focus on your institution's priorities across the student journey



Taken together, integrated services impact the entire student life cycle.

TANGIBLE RESULTS

"Working with InsideTrack has enhanced our ability to identify opportunities and implement systemic improvements. Their methodology helps us work more efficiently to minimize bottlenecks for advising and financial aid and better support students."

- Suzanne Harbin, Director of Advancement at Wallace State Community College

HOW IT WORKS

Your institution's long-term vision for student support is the starting point of every Training and Consulting program. Working closely with your team, we'll create a plan for developing the programmatic and staff improvements critical to attaining your goals. As we put this plan into action, your program will achieve sustainable advances that ripple throughout the institution.

InsideTrack's operations professionals are Prosci® Change Practitioners, an organization whose approach is widely recognized as one of the most effective for driving individual and organizational progress. Leveraging this experience, we provide consultation and support to help you successfully introduce and sustain new initiatives.

InsideTrack Training and Consulting enables institutions to configure an initial program and then incorporate additional services based on new capabilities or emerging needs. Throughout the engagement, we'll help you chart your progress toward key outcomes and develop additional strategies for meeting them.

INSIDETRACK TRAINING AND CONSULTING PROGRAMS SUPPORT STAFF AND ORGANIZATIONAL DEVELOPMENT:

Staff Development	A highly skilled and engaged team is critical to the success of any student support program. InsideTrack Training and Consulting helps you build and sustain staff effectiveness through recruitment, training and professional development.
Organizational Development	InsideTrack Training and Consulting guides you in launching and sustaining programmatic initiatives. We also help you assess your current operations and provide insights into student behavior and the competitive landscape so you can position your program for success.

TRAINING AND CONSULTING OFFERS INSTITUTIONS THE FOLLOWING OPTIONS:

Each of these Training and Consulting services, alone or in combination, improves student outcomes by enhancing program and staff capabilities.



STAFF TRAINING

Trains advisors and managers in coaching methodology and leading a coaching team.



STAFF CERTIFICATION

Provides foundation and advanced levels of training and certification for coaches and managers.



COACHING QUALITY DEVELOPMENT

Trains managers to build staff skills and address performance and quality issues.



PROFESSIONAL DEVELOPMENT

Provides support for coaches and managers to advance and enhance their skills.



TRAIN-THE-TRAINER

Provides instruction for staff on teaching coaching methodology to colleagues.



STAFF RECRUITING

Provides support with fielding and hiring strong student support candidates.



NEEDS ASSESSMENT

Analyzes program's current state and develops a plan to meet future objectives.



SECRET SHOPPING

Gives institutions insight into external perceptions of institution and programs

Appendix J

Noncognitive Skills Play Important Role in Student Success

DEFINING NONCOGNITIVE SKILLS

Noncognitive, or soft skills, have become a point of emphasis for both educational leaders and business executives. Most people agree soft skills play a greater role in student and career success than previously realized. College administrators want to know how to teach these skills, and future employers want their applicants to have them. Disagreement arises when it comes to a definition on which people can agree. While InsideTrack's coaching methodology, which continues to evolve, doesn't align with a particular definition, its core elements: knowledge, skills, attitudes and beliefs address various soft skills. More behavioral in nature than a "hard" skill such as typing or math, they include time management, persistence, teamwork and adaptability. Coaches discover their students' core beliefs and then build out knowledge, skills and attitudes where necessary.

Evaluating a student's core belief is an important start to assessing soft skills, said InsideTrack Coach Kate Mills. She determines this in part by asking questions such as: What keeps you going after getting a bad grade? Are you able to ask for help? How do you manage your time?

"I want to understand where that belief comes from, the skills a student already has in place, and what they use currently so I can better understand where the gaps are."

Kate Mills, InsideTrack Coach

The next step is to fill in those gaps by helping students develop habits for success. Mills also stressed the importance of celebrating success which helps enforce future positive behavior.

If your student manages one stressful situation well, then he or she will more likely tackle the next one the same way. Mills said students can use developed skills from academia in other parts of their lives and vice versa. Time management plays as important a role in building strong study habits as it does in conducting a job search, managing multiple projects simultaneously at work or juggling kids' after-school activities. Employers expressed concern that many job seekers lack the necessary noncognitive skills so critical for achieving goals in school, at work and in life.

"While there are many factors that come into play here, it is a fact that some less-qualified candidates are chosen over more-qualified candidates simply because they have stronger soft skills than their more-qualified counterparts."

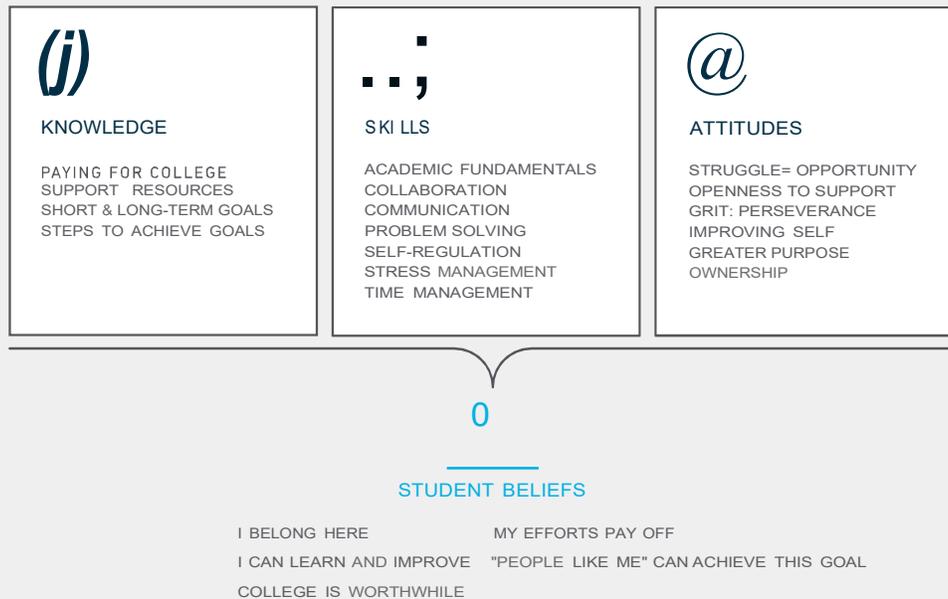
Jessica Simko, in a Careerealism article

This same article listed the six most critical soft skills as:

- Honesty and integrity
- Strong work ethic
- Emotional intelligence
- Self-motivated
- High energy/positive attitude
- Team player

HOW IT WORKS

At its most basic, InsideTrack's coaching model aims to help students improve their ability to learn and succeed in school and in life. The core methodology, comprised of knowledge, skills, attitudes and beliefs, combines cognitive and noncognitive skills, enabling students to navigate academic and/or career situations and have tools to handle future predicaments. The student stories below illustrate how seamlessly we have integrated soft skills into our coaching strategy.



KNOWLEDGE - PLANNING/PROBLEM SOLVING

Unsure of his career goals, Jared* found this contributed to his ability to handle some day-to-day issues. As a low-income student, he got buried in financial minutiae, needing a deposit of \$200 and having a flag on his FAFSA form. The details impacted his commitment and resilience. His coach helped him learn how to let go of career uncertainty and how to find helpful resources. He received a waiver on his deposit and fixed his financial aid form with a phone conversation.

SKILLS - COMMUNICATION

David*, like many other college students, hates team projects. A high achiever, he doesn't like to depend on others for his grades. As he faced another team project with a random group of students, he found himself completing all the work alone and shared his frustration with his coach. His coach reminded him that as a business management student he will likely face similar situations in the work environment. Coaching helped David shift his perspective about the intention of team projects and challenged him to communicate with and motivate his team. He identified the need to emphasize deadlines and the importance of each part of the assignment as his keys to success.

ATTITUDES - PERSISTENCE

An adult student, Rob* struggled with numerous issues including caring for an autistic child and health concerns after a recent surgery. He had to ask for one extension after his operation but felt embarrassed and depressed about asking for another when he didn't heal as expected. Having a sounding board helped him rediscover his persistence to pursue his goals. He opted to take only one class at a time in future to avoid school and other responsibilities overwhelming him.

BELIEFS - CONFIDENCE

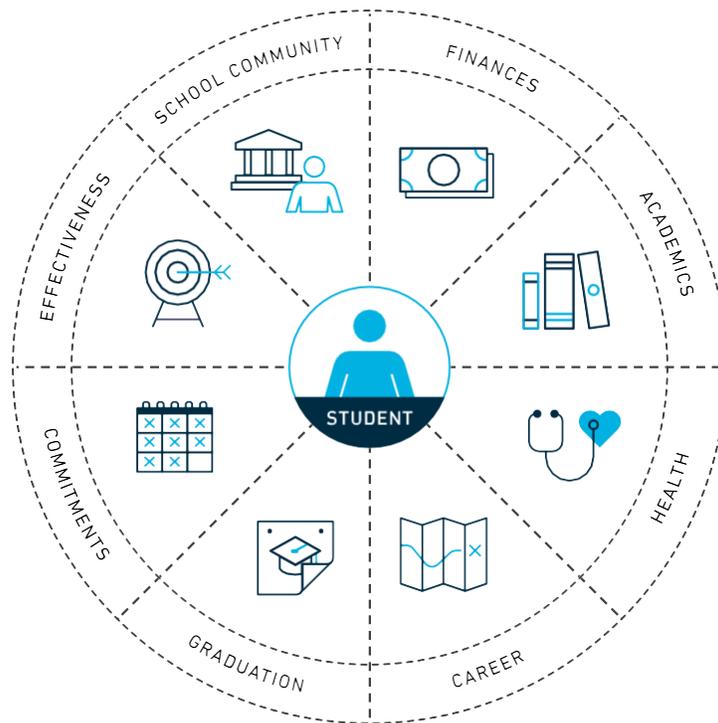
Michael* used GI Bill funds to earn a degree following his military service. While this put him in a strong position to attain future career goals, he struggled to translate his military skills to fit the requirements of the civilian jobs for which he applied. Michael got discouraged about what he had to offer and if anyone would hire him. His coach spent time learning about his military experience and helped him understand the transferrable skills to his new career. This guidance gave him the confidence about what he brought to the table and changed the way he communicated his skills to future employers.

**Names have been changed*

Appendix K

Student Coaching Focus Areas

The Focus Areas are eight main topics for coaching. These areas are tied directly to the reasons students drop out of school. If students are successful and satisfied in each of these areas, they are more likely to get the most out of their degree and successfully graduate. Advisors proactively introduce the Focus Areas to students, assessing their situations in each area and prioritizing the focus of their coaching among these topics.



GRADUATION

Addresses the commitment students have toward attaining a degree at their chosen institution. It includes their future plans and how education fits in, the value they place in pursuing their education, their desire/motivation to be in school, and the connection between current actions and long-term goals.

COMMITMENTS

Deals with students' ability to manage academic commitments alongside the other responsibilities they have, such as work, family, and extracurricular responsibilities. Time management, task prioritization, and balance are skills developed in this area.

FINANCES

Deals with how students plan to pay for school, now and in the future. Coaching topics might include gaining a better understanding of personal finances, gaining more control over their financial condition, and/or developing a plan for repaying their credit cards and student loans.

SCHOOL COMMUNITY

Looks at students' connection to their institution's departments and resources, as well as their opportunities and willingness to engage and be a part of that community. Some of the specific connections to consider are the people who comprise the student's school community or support teams: classmates, instructors, administrative staff, and coaches. Students who feel they've chosen the "right fit" may also include the curriculum and procedures that dictate their institution: campus life, attendance/grading/disciplinary policies, etc.

ACADEMICS

Looks at students' performance in the classroom, including their grades. Coaching topics in this area may include improving study skills, academic habits, or use of available resources.

EFFECTIVENESS

Looks at how well students control and/or follow through on intended actions. Coaching topics might include planning skills, organizational skills, and follow-through. Advisors work with students to develop confidence, communication skills, increased awareness and ownership, and an ability to work toward long-term goals.

HEALTH

Addresses how students manage both their physical and emotional health. Individuals who take good care of their health tend to be more effective and enjoy their time in school more thoroughly. The personal support network (friends, family, groups, and activities) students have in place during their time in school is an important factor in their success. Students who don't have a support network can be overwhelmed by school and its associated responsibilities.

CAREER

Looks at students' short- and long-term career goals. Coaching topics include mapping a career path, assessing skills and strengths, developing a resume, preparing for interviews, networking, researching internships, developing an elevator pitch, applying for jobs, organizing your job search, and advancing in one's current position.

Appendix L

Contributor Bios



KRISTIN GURROLA, STRATEGIC PARTNERSHIP DIRECTOR

Kristin Gurrola joined InsideTrack in 2007 and is currently a Strategic Partnership Director. She earned a Bachelor of Arts in Sociology from Pepperdine University and a Master of Education in College Student Affairs from Azusa Pacific University. Prior to her work with InsideTrack, Kristin directed an academic service-learning program and taught undergraduate leadership studies courses. She has experience with coaching and managing enrolled student and prospective (yield) student coaching, as well as consulting, training, and project management with community colleges, online programs, and four-year institutions. Kristin is also a certified change practitioner through Prosci change management. She focuses on building strong and collaborative partnerships with executive leadership, staff, and faculty that lead to positive student outcomes and drive institutional impact and change. Kristin spends her free time with family and friends, traveling, going to the beach, and having fun with her daughter.



AMBER ROSE DULLEA, NEEDS ASSESSMENT SPECIALIST, STUDENT SUCCESS SPECIALIST AND COACH

Amber Rose Dullea joined InsideTrack in 2008 and is currently a Student Success Specialist & Coach. She believes education can support people to reach their potential, develop critical thinking skills, and gain the tools they need to be lifelong learners. With respect, humor, and the ability to be an excellent listener, Amber Rose supports students to help them navigate educational opportunities, connect with resources, and develop lifelong habits that lead to a successful life. She has coached diverse populations including online, traditional, professional, and graduate students across the country and around the world. She enjoys coaching and loves to support people as they explore their motivations, tap into their strengths, and overcome challenges. Prior to InsideTrack, Amber Rose taught in human studies, business, and interdisciplinary departments at Marylhurst University, advised first-quarter graduate students at Antioch University Seattle, and ran her own businesses as a financial planner. She has also been a business consultant/coach, massage therapist, and health coach. Amber Rose earned a Bachelor of Arts at California State University Fresno in a special major - Peace and Conflict Studies - and a Master of Arts from Antioch University Seattle in Whole Systems Design. She is the author of two books and loves to walk on the beach.

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