

EAB Navigate Strategic Plan 2022-2027

The purpose of this document is to identify and share the purpose, process, and priorities in Navigate. It will also serve as a guidepost for actions taken regarding the EAB Navigate platform informed by the 2022-27 Advising Strategic plan and CSU's student success goals.

Purpose and Why Statement

At Colorado State University, the primary purpose of the EAB Navigate platform is to provide a user-friendly platform through which staff in student support roles can provide support through a cohesive care network in alignment with student success initiatives. The platform is a student success tool through which staff can more equitably, efficiently and easily advise and support students through a data informed caseload management. Strategic management of student caseloads – optimized through the lens of the *Culturally Engaged Campus Environment* framework – can be supported through the Navigate platform providing users several tools for identifying students in need (i.e.: EAB Support Priority Level), creating and curating students lists, and outreach and appointment tracking. With equity as a primary goal within the [University Advising Strategic Plan](#), the platform gives staff the tool to identify and respond to equity gaps. On an institutional level, EAB Navigate provides data and reporting functionality to illustrate institutional proactive outreach efforts and student success data such as course performance impact on graduation. Navigate can also provide a platform for coordinated campus-wide for student support that is seamless for the student.

This purpose is achieved by utilization of the platform functionality that aligns with the [University Advising Strategic Plan](#).

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University Academic Advising Strategic Plan (Applicable to Navigate)

Provide a broader institutional plan on how to enhance equitable, data-informed academic advising for undergraduate students.

Strategic Plan Priority 1: Equitable Academic Advising

Provide equitable academic advising¹ that maximizes positive outcomes for first generation, limited income and racially minoritized students and benefits all students

Goal 3- Caseload Management

Strategic Caseload Management provides proactive outreach for students to create a sense of belonging, and offer additional support for marginalized students.

Navigate supports Strategic Caseload Management in the following ways:

- Provides comprehensive overview of student information (i.e.: grades, GPA, course schedule, demographic information, etc.)
- Utilizes lists of advising caseloads that are updated daily based on students changing majors, doing a semester withdrawal, etc.
- Enter and review student interaction documentation (notes, appointment summaries, and conversations)
- Search for and identify students for proactive outreach such as students recommended for support and students in the probation process. Student facing staff can create lists of these students to provide and track outreach and appointments
- Communicate with students and schedule appointments through messaging (text and email) and campaigns
- Use the EAB Support Priority Level – which uses an proprietary algorithm based on student data and academic performance interconnecting together with CSU custom data – to identify high support priority students that may benefit from additional advising support.

Strategic Plan Priority 2: Inclusive Student Support

Empowering student facing staff and faculty to strategically partner in inclusive student support practices.

Navigate supports Inclusive Student Support in the following ways

¹ Equity is defined in the CSU Diversity, Equity, Inclusion, and Campus Climate Blueprint Glossary of Terms. Equitable academic advising is based within the culturally engaged advising framework outlined in Goal 2.

- Provides access to documentation of student interactions that are accessible to other student facing staff, faculty, and administrators who have a “legitimate educational interest”²
- Provides tools to communicate with students using text messaging functionality
- Provides students the functionality to schedule on-line an appointment with their assigned student facing staff (i.e.: advisors, ASCs, support network, etc.) with options for virtual or in-person appointments
- Provides a platform through which advisors and other student facing staff can provide student support through a cohesive care network in support of student success initiatives (i.e. cases and alerts³)

Institutional Data

The following data is collected at the institutional level through Institutional Research, Planning and Effectiveness (IRPE) or through centralized academic advising support leadership.

- Report institutional advising proactive outreach efforts
- Review historical CSU success data
- Review student communication and appointment data
- Gather department, college, or university-wide data on student success trends

Benefits of EAB Navigate

- Provides a platform through which staff and campus leaders can identify equity gaps between student populations and potential barriers to equity
- Allows for coordinated care effort in support of individual students through shared documents, messaging, lists, and outreach efforts
- Provides access to interactive micro and macro level data that is actionable for intervention
- Provides a mechanism for communication and outreach for students who are in the most need
- Provides a student experience this is consistent when scheduling and interacting with their assigned student-facing staff member(s)

Additional Technology Tools

In addition to Navigate, other tools are used to assist in the student support process:

Aries Web- this is the primary source for all student data and information that is tied to Banner. A direct link is provided to easily connect to this from Navigate. Some data is available in both Navigate and Aries Web. (Appendix B provides a table indicating what each tool can do). Aries Web is live information in contrast to navigate which updates overnight. The primary purpose of Aries Web is the complete student record. Navigate supplements Aries web with direct and trackable communication and scheduling tools for student outreach; student caseload management that is interactive for more easy creation and curating of student

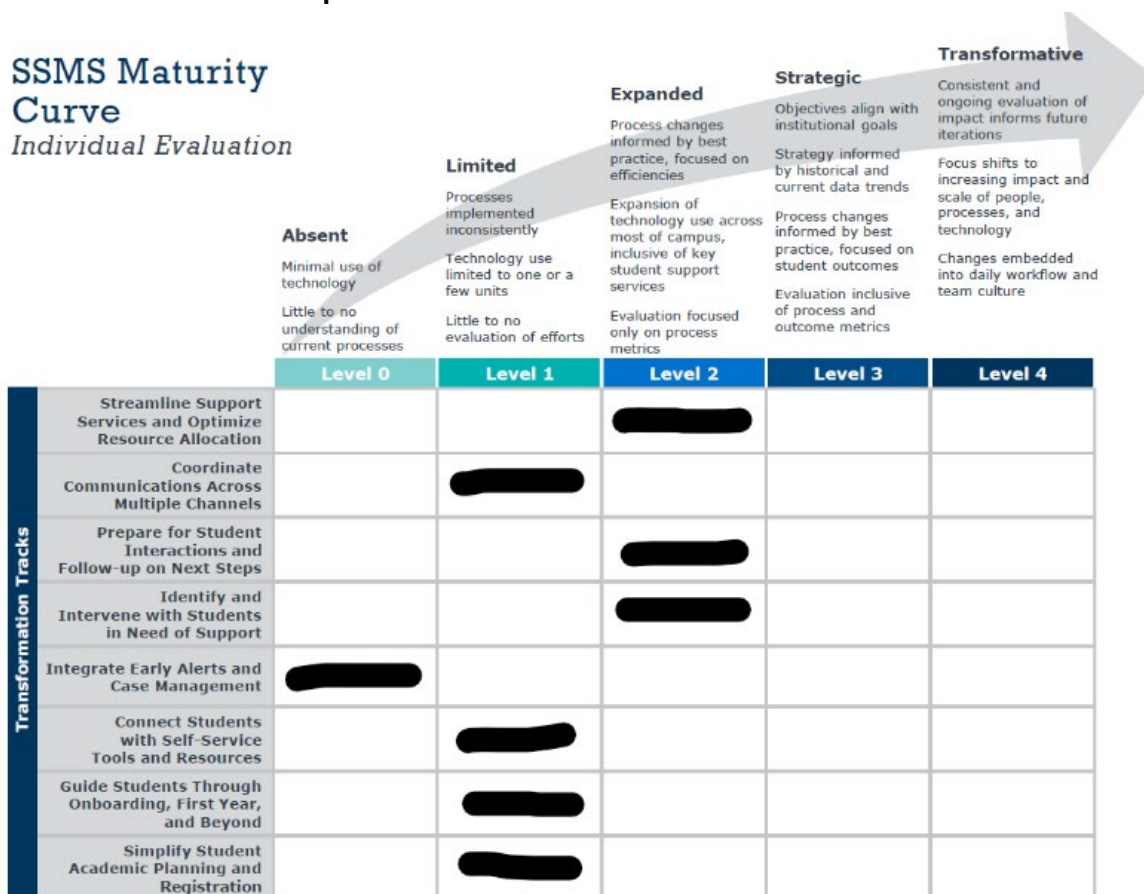
² [FERPA CSU Catalog Page](#)

³ This functionality has yet to be implemented at CSU

lists based on student identity, performance data, and academic record. Communication and scheduling tools do not exist in Aries Web.⁴

DARS- This is the tool utilized for degree progress tracking. A direct link is provided to easily connect to this from navigate. There are no degree progress or course planning tools available in Navigate.

Moving Toward Transformational Implementation



In an effort to utilize resources and tools -- informed by best practices – provided by EAB and utilizing the help and support from our institutional EAB strategic leader, our goal is to align with EAB’s transformation tracks (Appendix A) keeping in mind the nuances and needs of the CSU student facing community. The rationale for this is to line up with EAB’s recommended use of the platform which is built upon best practices derived from the myriad of institutions who use the tool across the country. Doing so also allows for streamlined and easier support, aligned with CSU strategy and goals, from our strategic leader and EAB technical support because we are using the better aligned with design specifications.

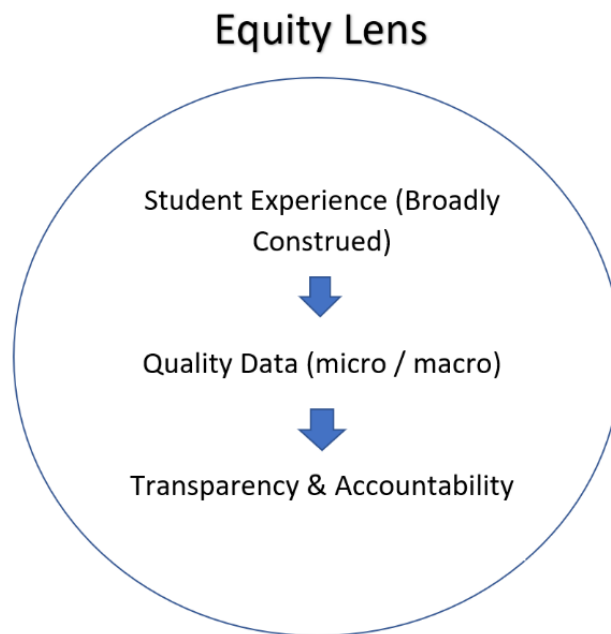
The platform has been designed and built with the student in mind. Systems and design features have been created to place students at the center providing them with a method for finding the resources they need.

⁴ When do students become active in Navigate and Aries Web? For both systems, students become active when they are admitted to the university. In Navigate, students become inactive at census if they are not enrolled for that semester. Because AriesWeb acts as our historical record of all students, there is no de-activation of students in AriesWeb.

In addition, the EAB Maturity Curve will be utilized to measure use of the tool that align with the outlined transformation tracks. The image to the right indicates where the executive leadership team has rated CSU's progress on each track as of Fall 2022.

Current Transformation Track Focus:

- Streamline Support Services and Optimize Resource Allocation
- Identify and Intervene with Students in need of Support
- Connect Students with Self-Service Tools and Resources



Guiding Values for Process Improvement and Implementation:

Using an equity lens guided through the Culturally Engaged Campus Environment framework (Museus, 2021), the guiding values for navigate process and implementation are:

- to ensure a quality experience for students that provides access to student facing staff in a consistent way
- provide quality data at both a micro and macro levels for staff and department/campus leaders focusing on equity gaps
- provide a transparent and accountable network of platform support for leaders and staff users to implement strategic caseload management and inclusive student support.

Process Strategy—when considering changes, implementation of platform updates, and improvements made by EAB, the following process and considerations are made in alignment with the guiding values.

- 1.) People-** How do changes impact the student experience in connecting with student facing staff? How are staff experiences impacted?

- 2.) Technology-** What can the technology do? What is necessary to support and maintain the tool and set-up?
- 3.) Process-** What values are imperative? What guiding questions are followed? How does it align with the advising strategic plan? Student success goals? Data collection needs?
- 4.) Communication-** What communication has been done to impacted users? What feedback has been considered?

Guiding Questions for Changes and Implementation:

- How do we want students to experience staff interactions (i.e.: advising, scholar success, etc.)?
- Are there any security concerns (i.e.: FERPA, data security, etc.)?
- What is the goal of a department/ unit initiative?
- What data will inform initiative assessment?
- For whom does this change create efficiencies? What will be done with the extra time in service of student success?
- What procedures or protocols are necessary for the initiative?
- How is success measured?
- Who is impacted? (Students, staff, etcetera)
- Is there a “need” or a “want”?
- How can we maintain and support enhancements/changes?

Campus Consistency and Customization:

A primary goal in Navigate implementation is creating a student experience in interfacing with the tool that is consistent among the students’ support network, so they do not need to learn a different approach to scheduling for each member of their support team. However, this is not meant to be at the expense of unit, department, and college customization. Many things can be customized by the staff user through campaigns, availability, and the outlook calendar. Some settings will need to be standard within locations, care units, and globally. The Advising Training and Development team will make recommendations based on best practices at CSU and, when appropriate, feedback from our Navigate strategic leader. Customizations that impact broader location, care unit, or global settings will consider the student experience, user feedback, and EAB recommendations.

Issues and Functionality Workflow

Navigate is supported through the Advising Training and Development Unit. Appendix C provides the workflow for users in addressing functionality issues.

Institutional Support of Navigate

Navigate User Group (implemented Spring 2023): The purpose of the user group is for staff who use the platform to come together to identify and problem solve issues and develop best practices for use by student-facing staff. Recommendations for configuration changes can be proposed by this group and submitted to the Governance group for review. Staff representation from each college and support network department are

invited to participate. This group meets on a monthly basis. (Example topics this group will discuss are: best practices for campaigns, issues related to scheduling and messaging, etc.)

Navigate User Group Membership:

- John Heisel (Chair)
- Carol Erwin
- Logan Bell
- Haley Richards
- Penny Lane
- Bess Moodie
- Sherri Frye
- Sarah Maddox
- Mark Barry

Navigate Governance Group (implemented Fall 2023): The purpose of the governance group is to review current navigate configurations and to propose and approve changes that impact care-unit or global levels. The governance group will review feedback and use data and determine any potential changes to system set-up based on a systems level view of how the platform is serving the campus community (i.e.: student experience, student-facing staff, faculty, and data gathering.) Configuration requests from individuals, departments, and other groups will also be reviewed. The membership of this group consists of multiple staff who represent a cross-section of staff users on campus – both everyday users and administrators are represented. This group will meet twice per semester. Any changes approved through this group will go into effect at the start of the next fall or spring semester. (Example topics this group will discuss are: request for configuration changes to locations or care units, changes in global settings, etc.)

Navigate Governance Group Membership:

- Sean Wernert-Eighmy (Chair) - Director of University Academic Advising & Advocacy
- Latoya Noel – Advising Training & Development
- Logan Bell – Warner College of Natural Resources
- Chase Jackson – College of Engineering
- Jenny Wysocky – Key Communities
- Caitlin Kotnik – College of Liberal Arts
- Michael Kallsen – College of Health & Human Sciences
- Bess Moodie – College of Natural Sciences
- Aaron Escobedo - Garmon – El Centro
- Tonja Rosales – College of Business

Executive Leadership Team: The purpose of the executive leadership team is to provide campus-wide visioning, guidance, and support for Navigate at the macro-level. They will consider issues on institutional data and reporting and consult on high level issues related to use, assessment, and strategy. (Example topics this group will discuss are: data scripts for daily data load, EAB Navigate contract renewal, data needs for institutional tracking, etc.)

Executive Leadership Team Membership:

- Sean Wernert-Eighmy (Chair) – Director of University Academic Advising & Advocacy
 - *Program Owner*
- Gaye DiGregorio—Executive Director, University Academic Advising and Advocacy
 - *Program Sponsor*
- Latoya Noel—Assistant Director, Advising Training and Development
 - *Application Administrator*
- John Heisel—Advising Operations Coordinator, Advising Training and Development
 - *Application Administrator*
- Tom Siller—Interim Vice Provost for Undergraduate Education
 - *Executive Sponsor*
- Ryan Barone—Assistant Vice President for Student Success
 - *Executive Sponsor*
- Heather Novak—Director of Institutional Research (As needed member)
- Mike Brake—Associate Director of IT and Assessment, University Academic Advising and Advocacy (As needed member)
 - *Technical Leader*
- Katie Kozicki—EAB Strategic Leader

Description of Roles:

Sean Wernert-Eighmy (Director of University Advising and Advocacy): Provide strategic visioning for the ATD unit and use of the Navigate platform. Collect assessment data on platform use, support for student success initiatives and the advising strategic plan and compile reports on the data, serve as a primary contact with the EAB.

Gaye DiGregorio (Executive Director of University Academic Advising and Advocacy): Provide guidance and grand visioning from an administrative, high level. Serve as the primary liaison to university senior administration on advising coordination, assessment, and strategizing.

Advising Training and Development Team (Latoya Noel and John Heisel): Provide technical support for the platform including onboarding/off-boarding, set-up development and assistance, troubleshooting, and offer training/professional development on use and best practices of the tool. The team will also serve as primary App/Admin contacts with the EAB strategic leader.

Katie Kozicki (EAB Strategic Leader for Colorado State University): Provide support and insight from EAB on institutional best practices for set-up, use, and implementation. Provide technical support to App/Admin team.

Key Performance Indicators:

Prior to EAB Navigate, advisors did not have an effective way of identifying specific populations of student who may be in more need of support (i.e.: SRS, FG, RM, etc.) which made outreach difficult to identify and

track. As part of a larger, intentional effort, EAB Navigate provides staff with the tools for more strategic caseload management through which outreach and communication can be accomplished and then tracked which can potentially impact persistence and graduation rates as well as equity gaps.

This not to say that student facing staff are solely responsible for improving these rates and gaps. Navigate simply provides a tool through which staff can manage their caseloads in a way that prioritizes those who are most in need. Retention, graduation, and equity gaps are a campus-wide responsibility.

All ASC/Advisors will use Navigate for strategic advisee caseload management.

- Advisor and Support Network use of the system
- Count of appointments by care unit
- Count of student contacts (Communications, Campaigns, Notes)
 - Five-year plan- Campaign and messaging effectiveness (i.e.: Advisor action prompting student action)
- Intentional use of EAB support priority level for caseload management
 - Students with high/medium support priority will have a higher percentage of student contact with ASC/Advisors than students with low support priority.
 - Advisors are implementing centralized proactive outreach efforts
 - Number of advising student contacts for university-wide coordinated outreach efforts within designated timeframes including First-Four Weeks, Early Performance Feedback; and contacts for students that are high support priority, non- registered, and in the probation process with disaggregated data by student demographics
 - Report on feedback from ASC/Advisors on using the support priority functionality for outreach and sharing the quality of the outreach contacts.
- Provide disaggregated data on the number of advising contacts related to persistence
- Collect qualitative data derived from documentation

EAB Navigate Contract Details:

<i>Start Date:</i>	December 31, 2020
<i>Early Termination Date:</i>	December 31, 2023
<i>End Date:</i>	December 30, 2025

Yearly Investment: \$248,040.00 (Annual Fee) + \$7,500 (Annual Travel/Admin Fee)

Appendix A: EAB Transformation Tracks

Introducing the Transformation Tracks

A collection of student-centric strategies that leverage Navigate's capabilities and best-practice processes to build your coordinated care network in support of your student success goals.



Streamline Support Services and Optimize Resource Allocation

Student service offerings are built with the student experience in mind and proactively communicated to students based on need, using student-friendly language within the technologies to ensure student utilization



Identify and Intervene with Students in Need of Support

The institution uses Navigate data to identify cohorts of students in need of proactive outreach and support and regularly updates these data to evaluate the effectiveness of interventions



Guide Students Through Onboarding, First Year, and Beyond

Institutions have populated an checklist with key action steps in Navigate Student across the full lifecycle, and the institution coordinates communication to focus populations and those students with greater need to ensure compliance with critical processes.



Coordinate Communications across Multiple Channels

Institutions coordinate messages across channels, align messages with the best-fit channel, and customize messages to drive positive student action



Integrate Early Alerts and Case Management

The institution has identified focus populations, common alert reasons, and corresponding intervention pathways using current and historical student data to create a coordinated care network comprised of advisors, faculty, and other support staff.



Simplify Student Academic Planning and Registration

Students have access to user-friendly, dynamic academic planning and registration tools, and advisors use those tools to keep students on track to a degree or intervene with students who are off track.



Prepare for Student Interactions and Follow up on Next Steps

Advisors, faculty, and student services staff use the Navigate student profile data, predictive model, analytics, and notes to conduct high-quality interventions and provide next-step recommendations



Connect Students with Self-Service Tools and Resources



Students can resolve most transactional questions using self-service resources, and the institution proactively pushes resource information to students suited for self-service to reduce the volume of demand on student support staff.



Align These Tracks with a Broad Student Success Strategy

Visit www.eab.com to download The Student Success Playbook, our guide to ensuring success, equity, and institutional financial sustainability

Appendix B: AriesWeb and Navigate Functionality

Function	AriesWeb / SAN	EAB Navigate
Student information		
Advising Documentation*		★
Link to DARS	★	★
Grade Predictor	★	+
Student priority algorithm		★
Student Transcript	★	★
View Admissions Data	★	
View Advising code / Reg Time	★	★
View Class Schedule (Browse Classes)	★	
View Student Schedule	★	★
View if a student has a hold	★	★
View Hold Detail	★	+
View Student Advising Code	★	★
View MyMajors Report		+
View Student Profile	★	★
View Advising Code List	★	
Student Scheduling & Communication		
Appointment Campaigns		★
Appointment Scheduling		★
Drop-in Tracking		★
Email		★
Kiosk Set-up		★
Text Messaging		★
Oriention Advising Scheduling		★
Caseload Management		
Caseload snapshot		★
Create & Track Student Lists		★
Search for students based on criteria		★
Sort Caseload		★
View Caseload	★	★
Data & Reporting		
Data Analytics		★
Generate reports		★
Tracking by staff team		★
Faculty & Instructors		
Course Overrides	★	
Progress reporting		★
Class Lists	★	★
Early Performance Feedback		★
Image Key		
★ Can be done in the system		
+ Linked to AriesWeb/SAN		
 Linked to another system		

*All documentation is synced between AriesWeb & Navigate. For students active in Navigate, notes are entered in Navigate; AriesWeb links to Navigate for documentation entry.

Appendix C: CSU Navigate Support Workflow

CSU Navigate Support Workflow

EMPOWERING TOOLS (SELF SERVICE)



End User has a question about piece of functionality

End User checks the institution's Microsite for any tips or resources

End user logs into the Navigate Help Center to look for an EAB-provided answer

End user logs into the community to look for a peer-provided answer

End User submits a question by emailing or enters a ticket to an Advising Training and Development Help Desk

INTERNAL EXPERTS

Triage to Workflow & Training Team

Supports questions about platform functionality, technological protocols at your institution, and best practices for using Navigate, such as:

- How do I send a text message to a student?
- How do I create a work list for the campaign I'd like to run?

Triage to Navigate Leadership Management Team



Supports questions about student success initiatives (overall), processes, policies, etc.

- Should we run a college Wide-campaign to support transfer degree planning?
- How can we share lessons learned and successes across campus?

Navigate App Admins (members of the Advising Training and Development Unit monitors tickets and has the knowledge base to provide an answer or pass along the question to the proper team for resolution.

Supports questions such as:

- I forgot my password!
- Can I have access to the Navigate platform?
- Why can't I schedule an appointment X location
- Why don't I have access to x, even though my colleague does?

EXTERNAL ESCALATION

Triage to EAB Partner Support (Navigate ticket system)

- Supports site issues such as:
- When I click on X I get an error message. What is going on?

Triage to Strategic Leader

Supports questions about strategy, risk modeling, data analysis and interpretation, EAB research, and future platform development, such as:

- Do you have research on integrating career and academic advising?
- What types of campaigns have other Navigate partners used successfully?