Life After a Successful Pilot:
Scaling Our Case Management Advising Model

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Learning Objectives

1. Define the case management approach to academic advising employed within the University College at Indiana State University

2. Identify the critical lessons learned when attempting to scale techniques utilized in a pilot.

3. Discuss and learn from others how to avoid and/or overcome similar implementation obstacles at their home institutions.
Institution Demographics

• Public; comprehensive

• 13,000 students with approximately 10,500 undergraduates

• High percentage of first generation, 21st Century Scholars and Pell Grant recipients, and historically underserved populations

• Access University; 82.5% acceptance rate; growing honors population
History of the UC

• Improve student retention

• Established in 2012 with first cohort entering 2013 and first class to graduate in 2017

• Advise all freshmen including those accepted into their academic colleges

• Provide scaffolding and support to conditionally admitted students and students on academic probation

• General education program housed within the UC
Why a Pilot?

• Strategic plan created an entrepreneurial environment

• Opportunity to develop, resource, and assess initiatives

• Proposition that a reduced advising load would allow UC to live up to mission of providing intrusive, developmental, and holistic advising thereby positively impacting first-year retention
Development & Implementation

• Timeline
  • Conversations started spring 2015
  • 2 year pilot began fall 2015

• Personnel
  • Three new professional advisors
  • One graduate assistant
  • Advisory board
Development & Implementation

- Operationalizing “case management”
  - Relational; Holistic; Intrusive; Developmental
- Quasi-experimental design
  - Control and match group
  - Populations already receiving structured academic support excluded
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- Fall 2015 pilot persistence *3.13%* higher than control; first-year retention *2.92%* higher than control
- Fall 2016 pilot persistence *5.97%* higher than control; first-year retention *4.72%* higher than control
- Fall 2016 pilot first-year retention *6.08%* higher than 2015 pilot
Best Practices

Case management

- Relational
  - 1:1 appointments
  - 6 meetings per year
- Holistic
  - Advising Checklist
- Intrusive
  - Avoid yes/no questions
  - Address non-verbals
  - Use data to address academic performance concerns
- Developmental
  - Navigate tools together during appointments
  - Help students anticipate upcoming critical dates
Best Practices

Outreach

• Tiered approach
  • Outreach is progressive, advancing ideally every 48 hours
    • Email; phone call; scheduling appointment on student’s behalf;
      Mapworks referrals; texting; letters
  • Cohort-wide programming
Best Practices

Accountability

- Contact Tracking Sheet
- General Advising Calendar
- Advising Checklist
- Framing reports from dean and executive director
- Progress and final reports
Scaling Our Advising Model

**Successes**

- Positively impacted retention
- Led to comprehensive advisor training & professional development programs
- Identified best practices for our advising unit

**Challenges**

- Lack of buy-in
- How to adjust/modify best practices when advising loads double
- Addressing areas of weakness
Discussion

• Questions about our process?
• What implementation challenges would you encounter at your campus?
To continue the conversation…

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Resources

McReynolds, J. (n.d.). *Advising as case management* [PowerPoint slides].


