BAY ADVISOR BULLETIN

YOUR SOURCE FOR ALL THINGS BAY ADVISOR

^^^ The new look of Bay Advisor showing the Staff Home page

Welcome!

Welcome to the first BAY ADVISOR BULLETIN. EAB, the parent company to our Bay Advisor platform hosts a yearly conference to share ideas across the several hundred schools in their collective. A newsletter like this is one of those ideas. I wanted to have a fun and easy way to send out updates to the advising community here at East Bay about the platform along with highlights on data, you the users, new ideas, and resources from the advising community. The Bulletin will be sent out at the start of each term, Spring, Summer and Fall. As you read this, if you like what you see and want to help write any sections, or have ideas please let me know by emailing bill.irwin@csueastbay.edu

In this first issue, I wanted to start small and establish a few recurring sections. The title story is on the major user interface update EAB is pushing in January. (look to the right) Yes, your beloved Bay Advisor is going to look different at the start of next semester, but don't worry, not much else is changing. The real massive change will come in summer to the student scheduling experience. More on that in our next issue. "The Progress Report" and "Advanced User" sections will be recurring pieces. I plan on having these sections in each issue as they highlight data and specific functionality of the platform. There are other features and news in this first Bulletin, so please continue to read on. As always, I welcome any feedback and look forward to working with you all in 2021.
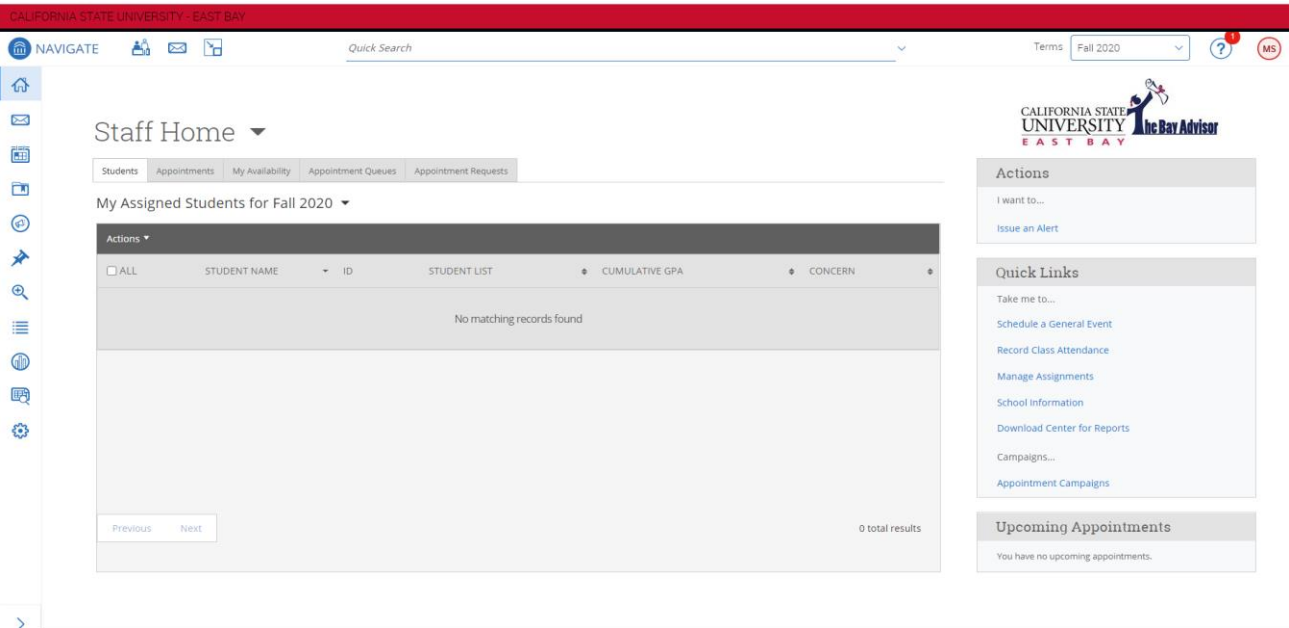
New Look Coming January

EAB is updating their Navigate platform, our Bay Advisor, this January with a new GUI, or graphical user interface. This update is mainly a cosmetic update and there will be limited changes to functionality. The biggest change in look comes with the "quick search" tool that used to be in the upper right-hand corner in between the term setting and the help center "?". The "quick search" tool has now been moved to the top front center, and no longer has the small looking glass icon. The functionality of the quick search is unchanged, you can still look up students by first name, last name, NetID, EmplID, or even horizon email address, whichever data point you have.

Also, the toolbar which houses the other icons across the top where the quick search is located are as follows. Appointment Queue, Unread Messages, and Minimized Dialogs. If there are more than 10 unread messages, you have the option to click Show More to open the Conversations page. Next is the Quick Search, the Term Selector, and the Help button, which opens the Help Center.

The Menu Bar is also updated and can be expanded to show the name of the page it takes you to. To expand the menu bar click the sidebar icon >. Each icon will have the name of

the page it takes you to next to it. Note that you may not have all the same icons as shown below based on your permissions.
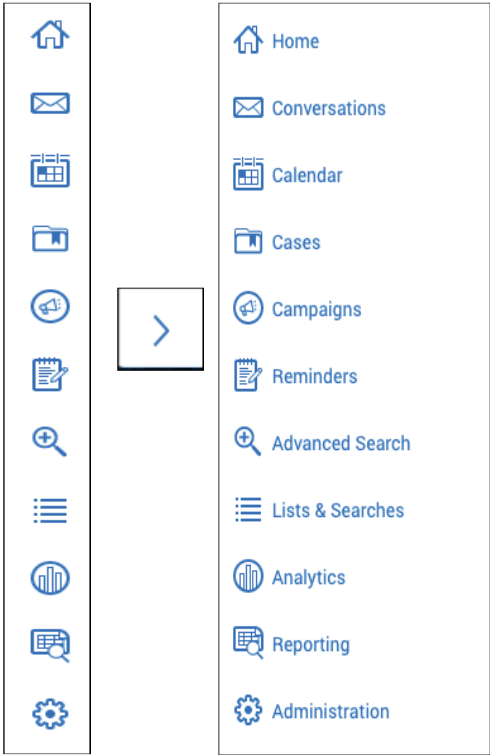
Lastly, in-platform notifications have been updated and will no longer show as a yellow bar across the top of the page, but in a pop-up window in the bottom right corner.

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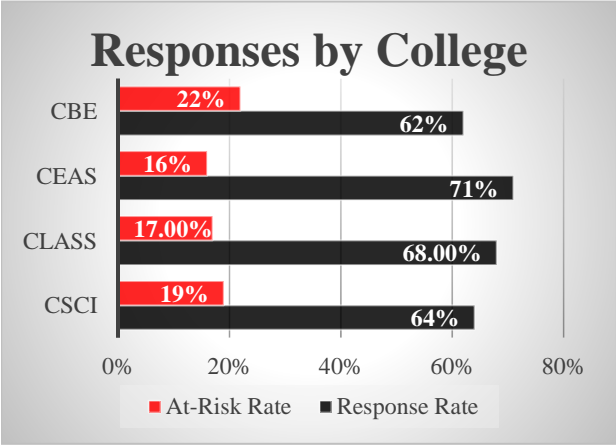
THE PROGRESS REPORT

Semester by Semester Data Highlights

Fall 2020 Progress Report campaign began on 9/15 and ended on 10/15. There were 19,483 evaluations consolidated and sent out by advisors on behalf of 3,986 students for selected student populations. We saw a positive response rate by faculty of 66% (13,028 returned reports) and an "at risk" rate of 17% (2,212 returned reports marking the student in question as "at risk" for failing the course). The "at-risk" marked reports were for a total of 1,444 students, of which 251 students had 3 or more "at-risk" reports filed. The number one "at-risk" reason marked was missing assignments. A chart of responses by college can be seen off to the right.

Thank you, faculty, for your responses and concern for our students. The advising community ended up hosting 5,289 advising appointments for 2,693 unique students based on the progress report responses.

Academic Alerts and Cases are the other form of early alert for our campus. Progress reports can be seen as our advisors reaching out to faculty for information on specific students, where academic alerts and cases are created when faculty reach out about a specific student to our advisors. This program launched in fall of 2019, and with the ongoing pandemic has continued to be a valuable tool for faculty in getting students assistance. This fall, we had 394 academic alerts issued for students. All alerts become cases which our advisors work to close with the student. 201 of the alerts were marked for missing assignments and all cases issued in Fall 2020 were closed in fall 2020. Faculty can create or initiate alerts and see the current status within the Bay Advisor Platform.

Advising appointment numbers for Fall 2020 across campus held steady despite moving all appointments virtually due to the COVID-19 Pandemic. In total there were 12,584 advising appointments, serving 7,332 distinct students in which the student attended, and an appointment summary was filed in Bay Advisor. This is down slightly from Fall 2019, but so was enrollment. One further bright spot is the no-show rate. In Fall 2019 there were 1,242 no-shows, in Fall 2020 we only recorded 591 no-shows. A vast improvement, which shows the commitment of our students and our advisors to the students during this pandemic.

<<< **Response Rate and "at-risk" rate of the Progress Report Campaign by College**.
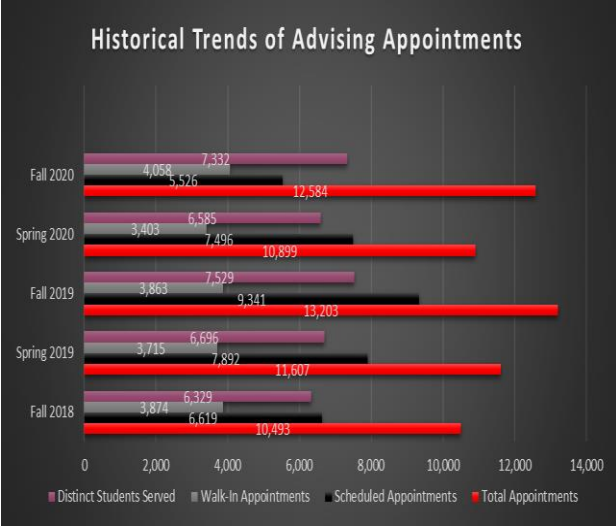
<<< **Historical Trends of Advising Appointments**

Success Team Box with Bilingual Identifier >>>

"You, Cal State East Bay's advisors, have done a fantastic job! Your resilience in these times has been incredible and it shows in the numbers. THANK YOU" said Maureen Scharberg Dean of Academic Programs and Services when asked about the data shown here.

Highlighting Bilingual Abilities

EAB, the parent company of our Bay Advisor, hosts a variety of conversations for their users throughout the year. One such conversation was on ways to help improve Diversity, Equity, Inclusion and Belonging (DEIB) within the platform. One idea was to highlight advisors who are bilingual by simply editing their name within the platform to include a specific indicator, such as Bilingual. We decided to pilot this with one advisor, Cindy Salinas, our Pioneer Success Coach for freshman students. Her name in Bay Advisor now reads: "Cindy Salinas (Bilingual - Spanish)" and when a student goes to schedule an appointment this is how her name appears in the platform. The name change will also show up in a student's Success Team box, but as you can see in the picture to the left, Bay Advisor puts the last name first.

Student feedback with Cindy has been all positive. She surveyed her students from this semester about the name change and almost all the students noticed the change, 88%, and most of the students, 55%, answered that they felt even more comfortable with her as their advisor knowing she was bilingual. One student commented "I really like that you added that in. I think the fact that you speak Spanish makes me even more comfortable in a sense, even though you're already a great person." And another student stated "I really appreciate adding 'Bilingual' on it because some student[s] may be more comfortable talking to someone who speaks both languages" which is the goal in editing user names in Bay Advisor. There are many students on our campus who speak a language other than English and being able to identify who can assist those students in their native language can help our students feel like they are included and belong. With a strong presence on campus of different ethnicities, backgrounds and languages, this is an opportunity for students to better connect to advising staff and faculty. Language can be something that connects the student to their advisor, and even if the student does not use the language as a primary, students can find comfort.

In speaking with Cindy about working with her students she felt "most students did react positively to the name change. They felt more comfortable knowing more about me before meeting even if they didn't use the other language." And for those students who did decide to speak with her in Spanish, Cindy said "I felt that they knew we had at least one common denominator" which is an important step in building rapport and trust. In her experiences, most students did not comment on speaking a second language, but some did find it comfortable to express "sayings or thoughts in Spanish".

If you would like to have your name updated to highlight your linguistic abilities, please email bill.irwin@csueastbay.edu and let him know the language(s) you would like to include.

REMINDER

Start of the Semester To Do's:

✓ **Update your availability**
If you use Bay Advisor to allow students to schedule appointments with you, you will need to update/edit your availability by going through your availability tab.

✓ **Update Cohort lists**
If you have any student groups in PeopleSoft, be sure the group lists are updated with any new or leaving students. The student group changes will be reflected the next day in Bay Advisor and can be searched through categories.

✓ **Update Student Assignments**
If you or your department have student assignments in Bay Advisor, please work with Bill Irwin to update any relationship assignments needed for the upcoming semester.

✓ **Update your own Student Lists**
Student lists, formerly known as watch lists, are local to your own Bay Advisor. They are a good way to separate student assignments, especially for messaging, and should be updated each term.

✓ **Decide what Campaigns you will run this term and when**
Appointment Campaigns should be planned out in advance. For more details look at the EAB Campaign Ideas by reading further in this Bulletin.

✓ **Relax, you have time, it's a long semester**
Be sure to make some time for yourself. You did a great job in Fall 2020, time to do it again 😊

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^^^ New Appointment Summary Boxes to assist in tracking remaining requirements and referrals

UPDATE

New Appointment Summary Boxes
Remaining Requirements & Referrals

Do you wish there was an easy place to track referrals? What about separating out a student's remaining course requirements to make them easier to read and look up? Starting this spring we will be adding two boxes to the top of the appointment summary to help you, the advisor. The remaining requirements box is ideal for adding in what a student has left to graduate, especially as they might transition from one advisor to the next, transferring in, or are a returning student. The referrals made box will help track the referrals made and help track if students followed through with the referral. Remaining Requirements is not a box that needs to be filled out each and every meeting, but only as an occasional check or during a transition. The idea in separating these notes out from the larger summary area, are to make it easier to find them when viewing a student's advising history to save advisor time. Also, the box is searchable through the Appointment Summary report which can assist advisors in planning future courses for students on a larger scale, rather than one-by-one, page-by-page.
The referrals box is where you would list any referrals you suggest to the student. The box is also searchable which will assist advisors and administrators in seeing which students follow through with advising referrals and assess the process in more detail.

Appointment Summaries or Advisor Notes?

A common question during Bay Advisor trainings is what is the difference between appointment summaries and notes? Or, why is there two ways to record a student interaction? The answer is that appointment summaries are intended to document important information about advising appointments, such as dates, times, reasons and locations. They should be tied to a specific advising encounter between you, the advisor, and a student or group of students. They should contain concepts like what the student was seeking, a reminder of the advice or courses given, follow up actions, referrals, documentation of any university or department policies/deadlines, and a summary of what was discussed in relation to a student's success and graduation. Summaries are NOT student facing currently and only other advisors can see them.

Notes on the other hand are transactional in nature and are intended to describe information about the student gained outside of an appointment. Notes are uploaded to MyCSUEB (PeopleSoft) nightly and can be viewable by the student if the proper box is checked. Because they are uploaded to PeopleSoft nightly, they are also viewable by the registrar and grad evaluators which makes them the ideal place to put course substitution notes. Notes should convey important information outside of an advising appointment, outcomes of efforts to resolve issues for the student, or information that you would want to have published for the student to view either through Bay Advisor or MyCSUEB.
Some guidelines and best practices for both notes and summaries are to write and advise

within your scope. Any details documented should be based in fact and should not represent second hand observations, guesses, bias or predictions. Sensitive information should only be included when academically relevant and should be handled with discretion. Also work to keep advising records brief, relevant and only use commonly understood abbreviations. Building a campus advising community that supports and cares for our students takes the efforts of us all. Communication is key to the coordinated care advising culture we are working to create at East Bay. With your help we can each support our students in our own way and share the load in supporting our students toward meeting their goals and graduation timeline.
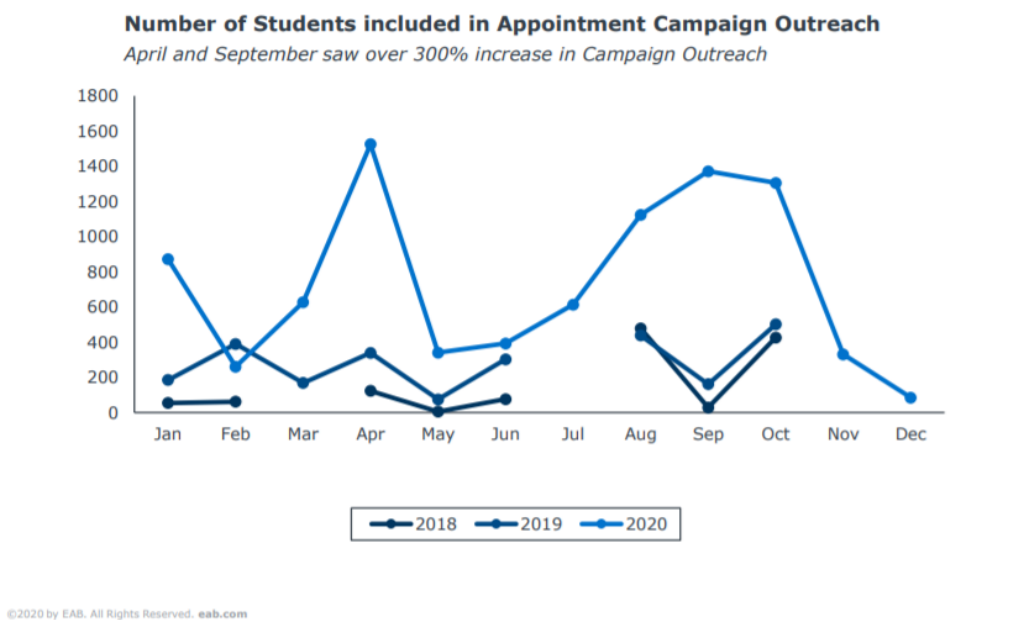
ADVANCED USER:

📣 Appointment Campaigns 📣

Appointment Campaigns are a way to send out a direct email communication to a specific population of students and ask them to make an appointment or a series of appointments with a specific advisor or advisors. They are a valuable tool and the usage of them has grown exponentially this year, probably due in part to the COVID-19 pandemic. Each month saw an increase in appointment campaign outreach to students over the previous years with the exception of February 2020. April 2020 and September 2020 both saw over a 300% increase in student outreach via Appointment Campaigns. In Fall 2020, there were 56 individual appointment campaigns targeting over 3,000 distinct students. There was an appointment scheduling response rate of 52% combined over the 56 individual campaigns. Everyone with advisor permissions in Bay Advisor can conduct an appointment campaign. Some appointment campaign topics have included welcome back appointments, GPA/NC concerns, course registration, progress report feedback, instructor office hours, or graduation advising. Below is a more complete list of potential campaigns to run, and when, provided by EAB in the 61 Campaign Ideas infographic.

The success of a campaign can be measured within the campaign features of Bay Advisor. The percentage of appointments made, reports created and the attendance rate for those appointments are all shown for each campaign you run thus helping you to determine what further encouragement you might need to send out to your selected population.

Once you have decided that you are going to run an appointment campaign, there is a five-step process to setting up and sending the campaign to your identified group of students. The process can be found at www.csueastbay.edu/aps/files/docs/the-bay-advisor/appointment-campaign.pdf and is also linked on the Bay Advisor info page. They are not hard to set up, but you will need to be detail oriented for them to function properly. If you have issues or questions, please contact bill.irwin@csueastbay.edu as he will help walk you through the process and sending of your desired campaign.

Number of Students included in Appointment Campaign Outreach
April and September saw over 300% increase in Campaign Outreach

61 Campaign Ideas
Target Your Advising Efforts Across the Year