EAB | Student Success Collaborative™

Measuring Campaign Effectiveness

Supplement to the Targeted Advising Campaigns Toolkit

Deciding on Metrics for Your Campaign

Guidelines

▶ Tips For Selecting Your Outcome Metrics

- **Always Track the Basics**

  For any campaign, you should track your own activity (i.e., students contacted, rounds of outreach) and student engagement (e.g., response rate, advised rate) because these metrics are important to evaluating the inputs that went into your campaign's impact. They are also helpful interim metrics that prove a "job well done" and provide motivation along the way.

- **Limit Yourself to What Really Matters**

  We recommend that you select approximately 6 metrics (i.e., 2-3 metrics in addition to your contact rate, response rate, and advised rate) to use in measuring the effectiveness of your campaign. More than 6 metrics will become burdensome to track. Also, if your campaign has more than 6 metrics it likely means your campaign objective is vague or too ambitious.

- **Focus on Actionable and Obtainable Student Outcomes**

  Select at least one short-term, action-oriented metric to track. Long-term metrics (e.g., graduation rate) are great, and often the ultimate goal of your work, but campaigns should be organized around actionable objectives for what the student needs to accomplish in order to get to those longer-term outcomes. A targeted advising session or two can only accomplish so much. It can help a student make a decision about declaring a major. It probably can't single-handedly help a struggling student get onto the Dean's list.

Sample Campaign #1

Target Population: students currently enrolled in the School of Business with GPAs less than 2.0

Objective: to inform students on warning or probation of university policies for dismissal and connect them to support resources to help improve their academic performance

Metrics:

- % of target population contacted via email
- % of target population advised in person
- % of target population that achieve a term GPA greater than 2.0
- % of target population that achieves good academic standing
- Fall-to-spring persistence rate for target population

Sample Campaign #2

Target Population: undeclared students with high risk predictions

Objective: to work with students to identify an appropriate major or enroll in the UNIV 103: Education & Career Planning course to help students with career decision-making

Metrics:

- % of target population contacted via email
- % of target population advised at least once
- % of advised population that declares a major by end of Spring term
- % of advised population that enrolls in UNIV 103

List of Common Campaign Metrics

Advisor Campaign Activity

Students from target population contacted with initial outreach

Unresponsive students contacted with follow-up outreach (for each round of follow-up)

Advised students contacted with post-campaign outreach

Student Engagement with Campaign

Response rate to each round of outreach

Total target population that responded to campaign outreach (across all rounds)

Total target population advised (via email, phone, or in-person advising) during the course of the campaign

Student Behaviors/Actions During or After Campaign Interaction

Enrollment in a desired course

Creation of a degree plan, retention/improvement plan, or graduation plan

Submission of a graduation application, intent to graduate form, or other necessary academic paperwork

Subsequently utilization of academic support services (e.g., tutoring, supplemental instruction, writing support, study groups, faculty office hours, workshops)

Completion of a follow-up conversation with another support provider on campus (e.g., course instructor, major advisor, faculty member, career services staff, financial aid staff, residence life staff, counseling staff, registrar staff)

Subsequently enrollment in a full course load or in 15+ credit hours

Re-enrollment at the university

Major declaration, change, or application for admission

Engagement with a particular resource during an advising session (e.g., completion of career assessment, completion of what-if degree audit, use of GPA calculator)

Creation of a parallel plan

Subsequently engagement in curricular extension activities (e.g., internship, study abroad, student research, thesis work)

Completion of an advising "contract"

Application for scholarship, tuition assistance program, etc.

List of Common Campaign Metrics

(Continued)

Student Outcomes
Term-over-term or year-over-year retention
Program or academic area retention (e.g., retention of female students in STEM programs)
Term GPA
GPA improvement (compared to previous terms)
cGPA above a certain threshold (e.g., 2.0 probation cutoff, 2.7 major entrance requirement, 2.5 graduation requirement)
Improvement in academic standing (i.e., no longer on probation)
Credit completion ratio (compared to targeted students in previous terms, compared to a comparison group)
Time to degree completion
Graduation
Tuition and fees revenue preserved due to student retention
Accepted into graduate program
Participation in academic enrichment activity (e.g., internship, co-op, honors program, undergraduate research, thesis work, study abroad)

How to Use this Tool

As you plan your next campaign using the Campaign Design Worksheet, you will see a box labelled "Evaluate Your Campaign Success." This box contains a place for you to list out up to six campaign metrics and your target outcomes for each. If you are struggling to come up with metrics for your campaign, take a look at this list of commonly used metrics for inspiration!

Evaluate Your Campaign Success

Metrics and Target Outcomes:	Metric	Target	Actual Outcome

Setting Campaign Goals

Example Goals and Outcomes from Previous SSC Advising Campaigns

Campaign	Goal	Actual Outcome
Help "Murky Middle" (2.0-2.99 GPA) Pre-Health students develop an academic plan to improve their GPAs or consider alternative majors (to reach the same career goal) *46 students – 1 advisor*	• 90% advised in person • 70% of those advised take action by creating an academic plan or changing to an alternative major	• 85% advised in person • 60% of those advised took action (27% created an academic plan and 33% changed their major)
Help underperforming students achieve program eligibility for a selective program *110 students – 2 advisors*	• 100% contacted by advisors • 40% advised at least once • 100% of advised students create an academic improvement plan • 5% raise GPA above program admission cutoff by Spring 2015	• 100% contacted by advisors • 90% advised at least once • 100% of advised students created an academic improvement plan • 19% raised GPA above program admission cutoff by Spring 2015
Help high-risk undeclared students declare good-fit majors or explore major/career options by enrolling in a Career Planning course *390 students – 6 advisors*	• 100% contacted by advisors • 90% advised at least once • 30% declare a major by Spring 2015 • 20% enroll in Career Planning course	• 100% contacted by advisors • 72% advised at least once • 2% declared a major by Spring 2015 • 5% enrolled in Career Planning course
Inform qualified students in the School of Social Work that they are eligible for a scholarship *9 students – 1 advisor*	• 100% contacted • 78% apply for scholarship	• 100% contacted by advisors • 100% applied for scholarship
Meet with students entering their sixth year (120+ credits) who have not yet applied for graduation or stopped out *33 students – 1 advisor*	• 50% advised in person, over the phone, or via email • 75% of those advised re-enroll in courses or apply for graduation	• 67% advised in person, over the phone, or via email • 91% of those advised re-enrolled in courses or applied for graduation

Designing Your Campaign for Impact Evaluation

Three Approaches to Campaign Design that Enable You to Assess Impact

The central question is…

> ## How will I know that the results of my campaign were due to my intervention and not just what would have happened had I not intervened?

For example:

- How many of these students would have come in for advising anyway even if I didn't proactively contact them?
- How many students would have gone to the career center even without my recommendation?
- How many students would have improved their GPA if I had not intervened and helped motivate them?

Three Different Approaches to Campaign Design

A

Pick a Target Population with a Good Historical Comparison Group

One way to asses whether your intervention succeeded is to compare your campaign results to the "natural" outcomes of a comparable group of students. We most frequently do this by comparing the campaign population outcomes to students that matched the same search criteria in a previous term. Their outcomes are the closest thing you have to a "control group" (i.e., group of similar students that did not receive the intervention).

Using a Historical Comparison to Assess Impact

1. Use the criteria you used to define your campaign population to identify the "same" group of students from a previous period
2. Decide on a time period (i.e., whether you will compare term to term, year to year, spring to spring, etc.)
3. Make sure nothing has changed between the two time periods that could make these populations of students markedly different (e.g., major curriculum change, change in program acceptance criteria)
4. Make sure you have access to outcomes data for your chosen metrics from previous terms (e.g., if you are trying to get students to visit career services ensure you have data on student visits to career services in previous terms)

Calculate the outcomes for both your campaign population and your historical population and compare how they performed on each of your chosen metrics

Example:

In the Spring term, you run a campaign around trying to get high-performing (GPA > 3.6), female students in the natural sciences to apply for an under-used scholarship. The outcome metric for this campaign would be the number of scholarship applications submitted by female students. For comparison, you would want to calculate the number of scholarship applications from the previous spring from high-performing female students in the natural sciences.

B

Create a Baseline and then Repeat Your Campaign

For some campaigns, you may want to define your target population using characteristics that make finding a comparison group impossible. For example, a population defined by having 3+ missing SSC success markers is incomparable if your institution just recently implemented SSC success markers.

One method advisors employ is to run their first campaign without setting goals or calculating impact, and develop reasonable definitions of successful outcomes through repetition. For this method, advisors still select appropriate metrics and calculate campaign results. However, for the first campaign, they do not attempt to identify what part of those results would have happened anyway. Instead, they repeat the same campaign, or a similar campaign, and use their first results as a baseline for comparison.

Example:

Spring 2014	Fall 2014	Fall 2015
First Campaign	**Second Campaign**	**Third Campaign**
Advising Rate = 47% (baseline)	Advising Rate = 54% (+7% improvement)	Advising Rate = 55% (+1% improvement)
Credit Completion Ratio = 81% (baseline)	Credit Completion Ratio = 82% (+1% improvement)	Credit Completion Ratio = 85% (+3% improvement)

C

Use Between-Group Design to Test Different Interventions

You may be familiar with this approach already. In marketing and business intelligence, it is often called A/B testing or split testing. In social science research, it is called between-group design. It is a more advanced way to design your campaign that allows you to maximize the knowledge you are able to gather for future interventions.

Option 1: Select a Larger Target Population and Intervene with Half

• Select your search criteria (i.e., SSC filters) to generate a group that is twice as large as you would normally work with for a campaign.
• Divide your identified student list in half so that you have a Group A (treatment group) and a Group B (control group). Use last name to randomly assign students to each group.
• Apply your targeted advising campaign intervention to Group A. Continue working with Group B however you would normally. Track outcomes for both groups and compare their performance.

This approach will help you determine how much more effective your targeted intervention is than normal practice at encouraging student behaviors and outcomes.

Option 2: Split Your Target Population into Two Groups and Use Different Approaches with Each Subgroup

• Generate your list of targeted students in the same way as normal, aiming for a manageable number of students.
• Randomly divide your identified student list in half so that you have a Group A (first treatment) and a Group B (second treatment).
• Design two different ways of working with the two groups of students. For example, you might try different outreach methodologies on each group or different activities/conversations during your advising appointments. Track outcomes for both groups and compare their performance.

This approach will not help you assess the ROI on your intervention, because you won't know what would have happened had you not intervened at all. However, it can generate great data on the relative impact of two different approaches.

Calculating Your Results

Common Results Calculations for Targeted Advising Campaigns

Response Rates

For each piece of outreach:

$$\text{1st Outreach Response Rate} = \frac{\text{\# of students that respond to 1st outreach}}{\text{\# of students that received 1st outreach}}$$

$$\text{2nd Outreach Response Rate} = \frac{\text{\# of students that respond to 2nd outreach}}{\text{\# of students that did not respond to 1st outreach and received 2nd outreach}}$$

Overall:

$$\text{Overall Response Rate} = \frac{\text{total \# of students that respond to any campaign outreach}}{\text{total \# of students outreached to in the campaign}}$$

Advising Activity

$$\% \text{ Advised} = \frac{\text{\# of students advised via email, phone, or in - person appointment}}{\text{total \# of students in target population}}$$

Student Behavior/Action

If the behavior or action is suggested in the outreach (i.e., students could act on the information without establishing two-way communication with the advisor):

$$\text{Completion Rate} = \frac{\text{\# of students that completed the action or task}}{\text{total \# of students in target population}}$$

If the behavior or action is dependent upon the student having been advised (i.e., students must have come in for an appointment or been substantively advised via email or phone):

$$\text{Completion Rate} = \frac{\text{\# of students that completed the action or task}}{\text{\# of students that were advised during the campaign}}$$

Calculating Your Results

(Continued)

Student Outcomes

Term to Term Retention

$$\text{Campaign Retention Rate} = \frac{\#\,\text{of targeted students that enroll in the following term}}{\text{total}\,\#\,\text{in your original target population}}$$

Average Credit Completion Ratio Improvement

$$\text{CCR} = \frac{\#\,\text{attempted credits} \;-\; \#\,\text{earned credits}}{\#\,\text{attempted credits}}$$

$$\text{Change in CCR} = \text{CCR}_{\text{campaign term}} - \text{CCR}_{\text{previous term}}$$

$$\text{Average CCR Change} = \frac{\text{SUM (all students' changes in CCR)}}{\text{total}\,\#\,\text{of students in your target population}}$$

Average Cumulative (a.k.a. Overall) GPA Change

$$\text{cGPA Change} = \text{cGPA at beginning of term} - \text{cGPA after end of term}$$

$$\text{Average cGPA Change} = \frac{\text{SUM (all students' cGPA changes)}}{\text{total}\,\#\,\text{of students in your target population}}$$

Retention Improvement

$$\text{Retention Improvement} = \text{campaign retention rate} - \text{retention rate for historical or control population}$$

$$\frac{(\text{campaign retention rate} \times \text{total}\,\#\,\text{students in campaign population})}{\#\,\text{of additional retained students as a result of campaign}}$$
$$-\,(\text{historical retention rate} \times \text{total}\,\#\,\text{students in campaign population})$$

$$\text{Preserved Tuition} = \#\,\text{of additional retained students as a result of campaign} \times \text{tuition and fees revenue per student}$$

Sample Campaign Report #1

Example – Word Document Format

Upper Division Advising Campaign
Department of Criminal Justice Administration

Objective

Contact students from the L – Z last name caseload that have completed and earned more than sixty hours (N = 169) in order to evaluate their upper division forms for graduation.

Purpose

At [Institution Name], students submit Intent to Graduate and Upper division forms two to three semesters prior to graduation. By implementing an advising session prior to graduation intent form submission and thereby informing prospective graduates of upcoming graduation requirements and necessary forms, the College of Behavioral & Health Sciences posits that students will select appropriate courses needed to complete graduation requirements and graduation rates will increase. Additionally, a pre-graduation advising session will help maintain the accuracy of intent to graduate forms and graduation processes.

Goals

1. Complete pre-graduation advising sessions with 50% of target population
2. Increase overall percentage of upper-class students that complete an advising session

Target Population Search Parameters

*   College: Behavioral and Health Sciences
*   Major: Criminal Justice Administration
*   Concentration: All (i.e., Homeland Security and Law Enforcement)
*   Earned Hours: 60 +
*   Low, moderate, and high risk student from L – Z Caseload

Campaign Process

*   Contact Upper Division student population and encourage each student to schedule and attend an advising session.
*   During sessions, review Upper Division and Intent to Graduate forms with students. Evaluate projected coursework to fulfill graduation requirements and provide contact information for Graduation Analyst or minor advisors, if necessary.
*   If projected coursework or forms are unsatisfactory, follow up with students to schedule advising session to resolve issues.

Communication Plan

Method	Timing	Communication Objectives
Email	Monday, March 2nd	Inform of academic progress and necessary forms to complete prior to graduation.
Reminder Email	Monday, March 23rd	Second contact to make advising appointment if not done so after email.
Phone	Monday, May 4th	Final contact to schedule appointment.
Advising Session	Once, student discretion	Review intent to graduate and upper division forms, advice for future career/professional goals.

Results & Discussion

The Upper Division Advising Campaign yielded 169 students—74 juniors and 95 seniors—from the L – Z caseload. For the junior class, 32% of targeted students completed an advising session or contacted an advisor to discuss necessary steps towards graduation. In comparison, 37% of targeted senior students completed advising sessions. Overall, 35% of targeted juniors and seniors completed an upper division advising session.

We have compiled accurate data from the present campaign in order to have reliable graduation documents for prospective junior and senior graduates. The campaign will help eradicate inaccurate documents, keep students on track with academic plans toward a foreseeable goal, and increase graduation and retention rates among the upper division student population. The campaign will be active until May 11, one week after the final phone contact on May 4. These steps will lead to an increase in the percentage of juniors and seniors who complete an upper division advising session. We also hope to see increases in the four- and six-year graduation rates in upcoming terms.

Sample Campaign Report #2

Example – Slide Format

Teacher Education Program Admission Campaign

Student Success Trial Initiative

Progress & Performance Report

Purpose

- The purpose of this campaign is to provide assistance to students pursuing a B.S. in Ed. Degree with admission to (and progression through) the teacher education program, or to assist in determining a separate path for successful degree attainment.

Objectives

- Assist potential teacher education students in progression toward admittance to the program (prerequisite to many courses within major, minor and TEPD itself)
- Develop goals and action steps for admittance to the teacher education program
- Assist with determining other viable options for success outside of the teacher education program

Target Population

- 2.0 – 2.99 GPA, not yet admitted to Teacher Education program
- 56 total students

Actions & Interventions

Planned

1. 56 of 56 students emailed
   - *First round as of February 28*
2. 56 of 56 students emailed
   - *Second round as of March 7*
3. 56 of 56 students emailed
   - *Third round as of March 17*
4. Remainder of 56 students called
   - *As of April 18*
5. 42 of 56 (75%) students completed personal meeting **and/or phone coaching***
   - *As of May 9*

   ***Added phone coaching to action steps during phone campaign as calls were more coaching-focused**

Completed

1. Round 1 Email – 100%
   - 1 response
2. Round 2 Email – 100%
   - 1 response
3. Round 3 Email – 100%
   - 26 responses
4. Call Campaign – 100%
   - Called remainder (28 students) with no response or interaction
5. Personal Meeting / Phone Coaching – 50%
   - 19 of 56 personal meetings (34%)
   - 9 of 56 phone coaching (16%)

- Remain at Risk – 39%
   - 22 of 56
   - No response or interaction of any kind

Progress & Results

- All progress markers completed to this point
- All students contacted/coached throughout have identified distinct action steps to move forward
  - Admittance to the program and plans to complete requirements
  - Seeking another major and utilizing resources of advising, etc.
- 9 of 56 original students have signed a different major

Lessons Learned

- Students lacking 1 or more "key" admission requirements
- Study sessions offered for PRE exam are of the utmost importance
- Expectations of the program are well communicated by advisors and professors
- Students' understanding of work needed to raise GPA & early communications of this
- Current coaching model (outlining desired future) helps lead conversation in the direction that will most benefit student
- Majority of students carry SPE or HDF major
- Many students at junior status or above
- Despite communications, some students still slip through cracks
- Phone conversations can be similarly effective to the purpose and objectives as face-to-face meetings, although they lack ability to track long-term progression

Recommendations

- Use SSC to reach at-risk students earlier in the term
- Potentially conduct 3 separate campaigns
    - Special Education
    - Early Childhood Development & Learning
    - Other
- Continue to strengthen OSS collaborations with teacher education and SPE/HDF advisors
- Assign students to a success coach after EDU 107 to set goals and track progress throughout program
    - Could be a requirement for EDU 107 or admission to the program