



Colleague
Student

Colleague Student Retention Alert

Your institution's mission is to help students succeed in their academic pursuits. Some students, however, encounter problems along the way and need extra help from you. Without this assistance, students are most likely to fail and not return. Imagine being able to identify and track behaviors that indicate students are struggling – low GPA, erratic attendance, financial changes, family issues, and so on. You would be able to help these students immediately and keep them on track.

With Datatel® Colleague® Student Retention Alert™ you are able to proactively identify at-risk students and begin intervention with them, before they leave your institution. Retention Alert is more than just software. It is a comprehensive, all-inclusive solution providing extensive professional services consulting to help you improve your strategic retention plan. The consultants implement the plan, design software parameters to help facilitate and manage retention efforts, create reporting for trend analysis, administer the training, conduct follow-up consulting, and adjust the solution to meet the desired outcomes.

Improve Your Retention Rate

Working closely with a Datatel Professional Services consultant specializing in strategic enrollment management, you review and build a plan to improve your institution's student retention. By increasing your retention rate just by a few percentages, you could significantly impact institutional revenues. According to the College Board, annual revenue lost per vacating student ranges from \$2,300 for a community college student to more than \$23,000 for a four-year private institution student. To calculate how much your attrition rate is costing you go to www.datatel.com/calculate.

A Datatel consultant will identify your institution's critical retention needs through extensive interviews with your institution's key stakeholders such as the VP of Enrollment, Registrar, Dean of Admissions, Director of Financial Aid, and Academic Advising Director. We review your current communication flows among advisors, faculty, and staff, define the advisory hierarchy, and help determine the student information you would like to monitor. As a result of the interviews and analysis, you will receive the Retention Management Decision document, outlining your institution's specific retention goals and the actions required to realize the desired retention outcomes.

Based on the discovery results, the Datatel consultant designs the case management system structure to meet your specific retention strategy, process, and goals. Following industry design standards, the consultant:

1. Tests the business rules
2. Builds the appropriate code parameters, advisory hierarchy and resource database records
3. Builds and tests your institution's communication flows in Communication Management
4. Builds a test environment account and tests the software extensively
5. Implements revisions and confirms readiness
6. Trains you and your staff

After the process and once the software is launched, your consultant assesses your results and progress periodically and adjusts the processes, software or reporting to better meet your needs.



Center for Institutional Excellence

Retention Planning Seminar

Higher education administrators face increasing demands to be more effective and accountable when managing their college or university. Retaining students from one term to the next is everyone's job and greatly impacts the bottom line, both for the student and for the institution.

Datatel offers the help needed to systematize the process of retention by applying Continuous Quality Improvement (CQI) and Institutional Strategic Planning principles. The Center for Institutional Excellence, (CIE) provides consulting and training to give you're the tools needed to develop an effective retention plan with academic industry experts.

What?

This workshop is a three day on-site engagement. There is a one hour planning call prior to the engagement to ensure everyone's expectations have been aligned correctly.

The seminar covers:

- Retention Goals
- Reasons for Retention
- Environmental Strategy
- Mitigation Strategy
- Early Warning Signs
- Leaver Identification System
- Intervention Strategy
- Ongoing Care System
- Communication Strategy
- Upstream Strategy

There is time built into the schedule to discuss what is happening locally and begin to formulate plans and strategies that will be important to the development of a unique retention strategy for the institution.

Unique Plan

It is the goal of CIE to assist the institution in developing a unique institutional plan for retention. Although CIE utilizes industry best practices in the guidance it provides to the institution, CIE does not have a specific retention template or canned format.

Who?

One of the biggest questions is who should attend this workshop. Getting the right people to the table is vital to the success of this project. The workshop is designed to work with the team on campus that has been assigned the task of developing a retention plan. The team should be made up of faculty, staff and students from around the institution. A large group for this seminar would be 25 people, a small group would be 5 and the best size for a working team is 12. This group should include decision makers as well as people who interact directly with students (especially students who are having difficulties). The group should be balanced between student services and faculty and must have executive level support (if possible executive level participation).

Additional Guidance

The Center for Institutional Excellence also offers additional consulting and support as a follow-up and throughout the retention planning process at the discretion of the institution.



Retention Alert System

What does the software do? The Retention Alert case management system enables you to track specific information about students, opens a case about a student, and automatically alerts you of any issues so you can immediately help the student.

Based on the strategies agreed upon in the Retention Management Decision document, we develop scenarios that you wish to track and monitor. For example, you can set low GPA as an automatic trigger so if a student's GPA drops below the designated level, Retention Alert will automatically open a case. Cases can also be added manually. With smart security, you can control who can open a case and who can view the information, ensuring case privacy and FERPA compliance. For example, a professor might notice a student's attendance has dropped and open a case indicating that this is unusual behavior. However, that same professor would not be able to view other cases about that student or other students, unless you want them to do so.

Once the case is opened, either automatically or manually, a notification is sent to the appropriate, institution-defined staff member who can initiate communication with the student immediately. The case information includes symptoms of the problem, the owner of the problem (advisor, professor), and a history of the communication between the student and the owner.

Significant benefits are obtained when creating a case using rules within Colleague and Retention Alert:

1. *Document problems consistently.* Providing the ability to document problems online leads to consistent, comprehensive information. Developing a repeatable process is simplified when information is reported early and is complete.
2. *Document cases completely.* Throughout the process of helping the student, the case information is captured, and the data is presented in a concise format, including triggers, communication tracks, detailed email history, and reminders. Standard Colleague security is used to restrict access to the case history.
3. *Reinforce case progression.* Your senior retention officer can be confident knowing that automated reminders and emails ensure that each case moves forward. Leveraging Datatel's workflow technology, alerts can be triggered based on your pre-determined scenarios and management notified should cases become stalled.
4. *Monitor retention effectiveness.* Since all case information is documented in one central system, reporting and summarizing institutional retention effectiveness is easy. You can run any of these standard KPIs: open versus closed cases, case distribution loads, and the graduation rate of students with case histories.

Contribute Case Information

* = Required

Retention Case for Mr. Andrew Coe

Case Type *

Summary *

Internal Notes *

Did you contact this person? Check Any that Apply

In person	<input checked="" type="checkbox"/>
E-mail	<input type="checkbox"/>
Phone	<input type="checkbox"/>
Standard mail	<input type="checkbox"/>
Text message	<input type="checkbox"/>

Example 1: A manually created retention case.

Work the Case

Case ID #19, Retention Case for Ned Adams
Colleague ID XXXX00X

Priority Medium
Created By Colleague Batch
Owner Allan Advisor

Case Types

Expanded Case History

Summary	Reminder Date	Contact Methods Used
04/06/06 Low GPA Case created by Ned Adams	04/07/06	

Information Links: [Student Profile](#) [Program Evaluation](#)

Choose an Action

- Add a Note
- Send E-Mail
- Set a Reminder
- Manage Reminder Dates
- Begin Communication Track
- Add Another Type To Case
- Change Priority
- Reassign Case
- Close the Case

WebAdvisor 3.0

Expanded Case History

Case ID #19, Retention Case for Ned Adams
Colleague ID XXXX00X

Priority Medium
Created by Colleague Batch
Owner Allan Advisor

Case Types

04/06/06 12:48PM, by : Low GPA Case created for Ned Adams. Case created by Colleague Batch after subject 1083638 failed Rule LOW_GPA.

01/29/07 12:48PM, by Allan Advisor: Added Communication Code LCOPA1 / Low Cum Gpa First Letter to Case...

01/29/07 01:00PM, by Allan Advisor: Check on Ned Adams and his grades...

01/29/07 01:23PM, by Allan Advisor: E-mail sent: Regarding your Retention case... Addressee: E-Mail text: It has come to my attention that your low grade point average (especially in English) is putting your eligibility to compete with the Defatal University Track team at risk. I would like for the four of us to meet this Thursday at 2:00pm in my office. Please reply to this email to confirm our meeting. Regards Allan Advisor

01/29/07 01:26PM, by Allan Advisor: Confirm attendees for conference with Ned Adams... Ned, Ivan, Coach, and myself.

Example 3: The depth of case management information available on the Expanded Case History form.

Example 2: An automatically created retention case showing action items available (also available in manually created cases).

Datatel Professional Services

Datatel's Professional Services consultants are available to implement Retention Alert on your campus with a comprehensive solution: Retention Management Consulting Services. Using your policies, procedures, and standards, a Datatel consultant, with the assistance of a Datatel retention management subject matter expert, will implement Retention Alert in a four-phased approach:

Phase I: Retention Management Implementation Readiness

Through interviews with key stakeholders, the Datatel consultant gathers and reviews your current retention policies. Once your institution's critical needs have been scoped, the consultant prepares and presents the Retention Management Decision document. The document outlines specific themes and goals as articulated by the stakeholders and outlines the actions required to realize the desired retention outcomes. Phase I includes the following:

- Present Retention Alert preparation materials
- Client participation in a one-hour virtual "Preparing for Retention Management Consulting Services" Webinar
- Client provides available retention materials (such as retention plan, strategic plan, documented processes, etc.) to Datatel Retention Management Subject Matter Expert
- Datatel consultant and Retention Management Subject Matter Expert review delivered materials for preparation of services
- Datatel consultant schedules virtual interviews with key retention stakeholders (as named by the client)
 - ◊ Institution named Retention Leader
 - ◊ VP/Dean of Enrollment (if different than leader)
 - ◊ Registrar
 - ◊ Director/Dean of Admissions
 - ◊ Director of Financial Aid
 - ◊ Academic Advising Director/Coordinator
 - ◊ other campus leaders (Student Life, Judicial, etc.)
- Datatel consultant and Retention Management Subject Matter Expert review the institution advising process and procedures
- Discovery meeting is held to determine reporting requirements
- Datatel experts prepare the institution's Retention Management Implementation Decision document
- Presentation of the institution's Retention Management Implementation Decision document and consulting services plan, including timelines, Case Management procedures, and reporting solutions

Phase II: Design/Build the Retention Management Environments

Datatel will design your case management structure, based on discovery results. The Datatel consultant conducts testing of business rules, builds appropriate code parameters, advisory hierarchy, and resource database records. After building and testing your institution's communication flows utilizing Colleague Communications Management, the consultant builds the test environment account. Phase II includes the following:

- Datatel to verify that appropriate Software Updates have been installed in the Test and Production Environments
- Create Datatel access and appropriate user security for build and test
- Prepare a plan for movement of data and setup from Test to Production
- Build Resource Database records based on client security and workflow
- Update/customize delivered Computed Columns and/or Subroutines and/or Rules to accommodate Decision document
- Build and/or review required Degree Audit and e-Advising to accommodate Decision document
- Build Test codes and parameter setup to accommodate Decision document
- Build and test workflows to accommodate Decision document
- Build "My To Do List" structure to accommodate Decision document
- Build and test Communication Management codes and workflows to accommodate Decision document
- Scope and develop reports based on client requirements
- Create test scenarios
- Test reports to ensure they match client requirements
- Review setup and test scenarios with client implementation leaders
- Final approval of setup and test scenarios
- Prepare Test environment for client training and delivery

Phase III: Client Turnover and Training

In preparation for launching the Production Environment, the Datatel consultant: confirms documented procedures; documents process revisions and updates the Retention Management Decision document; and reviews Retention Alert setup. The Datatel consultant then moves the Test account to the Production Environment, and the solution is launched. Phase III includes the following:

- Develop and prepare training materials to be used as resources for client training events
- Update Retention Management Decision document to reflect training materials and references
- Training of delivered Retention Alert solution with complete client scenarios
- Training on delivered reports
- Update revisions and changes based on training feedback
- Final debriefing of setup and training outcomes prior to setup in Production Environment
- Final set-up in Production Environment
- Review of Production Environment for client delivery

Phase IV: Post-Live Sustainment

During post-live support the Datatel consultant schedules and conducts four conferences with the appropriate staff. Processes and reports are reviewed and adjusted, if needed. A Retention Alert Action Plan is prepared based on feedback from appropriate staff. Phase IV includes the following:

- 60-Day Review
- Provide any updates or changes based on review
- 90-Day Review
- Provide any updates or changes based on review
- 120-Day Review
- Provide any updates or changes based on review
- Final Retention Management Consulting Services Project Review and Debriefing

Where can I learn more about Colleague Student Retention Alert?

Retention Alert is compatible with Colleague Release 18 and WebAdvisor version 3.1 (and later releases). Communications Management can also be used to enhance Retention Alert functionality and create automatic communication streams. Retention Alert is available as a perpetual license, with annual support (ESSA) prorated the first year. Contact your Datatel representative to discuss how Retention Alert can benefit your campus or send a note to ClientSales@datatel.com.

Attending Datatel's no-charge Web Demo Room presentations is another way to learn more about Colleague Student Retention Alert. Visit www.datatel.com/RecordedWebDemos to view *How Many Students Can You Afford to Lose? Stop the Cycle with Retention Alert.*

For more information on Colleague Student Retention Alert, contact your Datatel representative or send a note to ClientSales@datatel.com.

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