



Developing a Proactive Outreach Plan

Guide for Faculty to Incorporate Proactive Outreach into Academic Advising

About this Guide

Do you want to help students navigate advising and avoid common pitfalls? Frustrated by students' lack of preparedness and awareness?

Many faculty members recognize the value of proactive intervention to help students be more successful. However, faculty members wear many hats, and must fit advising into their overall portfolios of responsibilities. Faculty advisors clearly need a different approach to proactive advising from professional advisors – one that leverages their unique relationships to students but also accommodates their specific responsibilities and time constraints.

In interviews with faculty members at SSC colleges and universities, we discovered that many faculty members already engage in targeted, proactive outreach. They send emails at specific times in the academic term to encourage their advisees to take various actions (e.g., register for courses, schedule an appointment). When done effectively, these strategic nudges can positively inflect student outcomes by increasing awareness and helping students complete important tasks on time. They can also improve the student experience by helping faculty members build connections with students that might not seek assistance on their own.

The following guide is based on those faculty members' approach to proactive advising. It provides faculty members with all the guidelines, tips, and resources you need to incorporate proactive outreach into your advising practice using a proactive outreach plan.

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Michele Norwood

www.iupui.edu/success

e-mail: asc-inquiry@iupui.edu



Overview: Proactive Outreach Plans

One Term **Proactive Faculty Outreach Plan**

	<i>Proactive Interaction</i>	<i>Desired Student Outcome</i>
Pre Term	Email #1	<ul style="list-style-type: none">▪ Understands advising process for semester▪ Reconnects with advisor
Early Term	Email #2	<ul style="list-style-type: none">▪ Goes to tutoring
	Email #3	<ul style="list-style-type: none">▪ Comes in to advisor to discuss internships, career planning, study abroad
Registration Advising	Email #4	<ul style="list-style-type: none">▪ Schedules advising appointment early and arrives prepared
Pre-registration	Email #5	<ul style="list-style-type: none">▪ Clears financial hold and is able to register on time
Late Term	Email #6	<ul style="list-style-type: none">▪ Discusses failure to enroll next term with advisor

Goals:

- ☐ To send personalized emails to subsets of advisees periodically throughout the term
- ☐ To strategically align the content of the emails to specific student activities or needs at that time in the term so that students are more likely to follow through on the advice
- ☐ To encourage students to take advantage of existing resources and opportunities

Benefits

- ✓ Improves student awareness and preparation for advising
- ✓ Students more likely to avoid common pitfalls (e.g., holds, failure to get PIN)
- ✓ More students seeking advisor support for long-term academic and career planning
- ✓ Stronger faculty-student relationships and better student experience



General Guidelines and Tips for Proactive Outreach

How To

1. During your regular planning time for the upcoming term, **set aside time** to strategize and prepare for your proactive outreach to advisees.
2. **Decide on your approach.** Use the template outreach schedule on p. 6 of this guide to:
 - Decide how many pieces of outreach you want to send
 - Determine the timing, content, and advisee group for each piece of outreach
3. **Create your emails to students.** Review the sample email templates on p.7 of this guide as inspiration, or to customize for your use; we recommend that you create the stock emails you will send all at once at the beginning of the term so they are ready to go when you need them.
4. **Set calendar reminders.** Block off time when you plan to send each round of outreach.
5. **Execute on your plan.** Throughout the term, export appropriate work lists from the SSC platform and use a mail merge to send your template emails to their intended audiences

Pro Tips from Faculty Advisors



With SSC work list exportation and mail merge, sending emails to your advisees is easily scalable. One student or 100 makes little difference. However, if you plan to track outcomes or require students to come in for additional appointments, try targeting no more than 30 students.



Faculty members report that personalized emails are important for establishing rapport with students and making them feel supported by the institution. Use exported SSC work lists and your native email system's mail merge functionality to send personalized emails to advisees.



While some proactive emails may be general in nature (e.g., reminding your advisees who you are), most messages should contain specific, concrete action steps that students need to take (e.g., clear holds on your account, seek supplemental instruction).



Direct language also elicits the highest response rate. If you want a student to come in for an appointment, use "Please schedule an appointment with me next week" rather than "I would be happy to speak with you sometime next week."



Sample Outreach Schedule

Any Academic Term

Timing	Audience	Email Content	Purpose	Work List Filters
First week of the semester	All advisees	Welcome back; general advising instructions; invitation to come in at any point throughout semester	Advisor-student relationship building; general advising awareness	Advising group**
First half of term	High-risk advisees	Invitation to come in and discuss strategies for successful term; reminder of resources available	Improve course performance	GPA below a certain threshold, "High Risk," or many notifications
First half of term	Mid and high-performing advisees	Invitation to come in and discuss long-term planning, internships, extension activities, career planning	Improve student experience and post-graduation outcomes	GPA above a certain threshold, "Low Risk," or few notifications
Before pre-registration	All advisees or high-risk advisees	Invitation to come in and discuss upcoming courses as well as long-term planning; reminder of # of notifications and invitation to discuss fulfilling success marker courses	Encourage students to seek appointments earlier; encourage more students to seek advice	Advising group**
After registration but before the end of the current semester	Advisees that fail to register for the upcoming term	Reminder the registration period has passed; invitation to come in and discuss upcoming term enrollment	Prevent unnecessary stop/drop out	Not enrolled for upcoming term
Any time	High performing advisees	Reminder of any scholarships or internships for which only students meeting certain criteria are eligible	Engage and retain high-performing students; improve student experience	Meeting scholarship or internship requirements (e.g., GPA, enrollment, credits)

**Note: if your institution defines each advisor's cohort of advisees in the SSC platform, you should be able to create a work list of your advisees using the "Advisor/Group" filter. If your institution does not define these groups, you can select alternate criteria that closely approximate your caseload (e.g., majors with specific last names) or manually create a watch list of all your advisees.



Template Outreach Schedule

Academic Term: _____ Year: _____

Timing	Audience	Email Content	Purpose	Work List Filters



Sample Proactive Emails

Type: Email to Struggling Students at Beginning of Term

Subject: Academic Concerns

Body:

Hi [Name],

I hope all is well as you begin to get back into the groove of things after winter break. I am writing today because I have become deeply concerned with your academic performance in the Accounting major, and what it might mean for you long-term.

In order to continue in the College of Business and to graduate with an Accounting major, the minimum GPA requirement is a 2.5. Right now, your GPA is below that. I would like to set up a time for us to meet soon so that we can discuss your goals and make a plan for how you can improve your GPA this semester. Please contact me by the end of the week (February 6th) to schedule an appointment. You can email me at this address, or call XXX-XXXX.

In the meantime, you might want to check out the tutors in the College of Business' tutoring center. Getting off to a good start in your courses this semester is the first step!

Have a great week and I look forward to hearing from you soon.

Type: Introductory Email to All Advisees

Subject: Welcome Back Message from Your Advisor

Body:

Hi [Name],

Welcome back! I hope you had a wonderful summer and are ready for the new year. I just wanted to write and remind you that, as your academic advisor, I'm here to help you have a great year and reach your goals. And not just during pre-registration...

While I of course want to see you during pre-registration to help chart your academics for the next few years, I am more than happy to work with you at other times to explore your options, plan ahead, and support your academic and personal growth. I can also connect you with campus resources to help you explore career options, enhance your study skills, and develop yourself as a student.

Your success is important, so feel free to reach out to me at any time. Email me at name@email.edu or call me at XXX-XXXX.

Looking forward to working with you this year!



Sample Proactive Emails

Type: Email to Struggling Students Before Finals

Subject: Finals Week

Body:

Hi [Name],

I hope you've had a good semester this far. There are only two weeks left until finals, and now is the time for you to put your best foot forward and improve your GPA. Remember, you need a 2.5 GPA to graduate with an Accounting major.

Finals can be stressful, but there are resources here on campus to help put you in the best position for success. Here are a few tips from me:

- **Work Early** – The earlier you get started on studying and finishing those final projects/papers, the less stressful it will be when they all become due around the same time.
- **Take Advantage Of Resources** – Meet with your professors during office hours, visit SI sessions, or attend programs that will help you with final exams. Visit the Business School tutoring center to review important topics for your exams and any papers you have to submit. Review the study skills resources on the Academic Support Center website
- **Take Breaks** – Avoid study marathons and get outside to enjoy the fresh air. Take advantage of the Gentle Friday activities that happen on May 2.
- **Keep Calm On Test Day** – Work out, listen to music, and relax before your exam. Know what strategies work best for you and make a conscious effort to incorporate them.

If you would like to come in and speak with me, I'd be happy to discuss test preparation, overcoming testing anxiety, and study skills. I can be reached at this email address, or XXX-XXXX.

Good luck, and I look forward to hearing how the rest of your semester goes!



Appendix

Technical Instructions

Exporting SSC Work Lists (also available on p.10 of the SSC User Guide on eab.com)

Users can export work lists and watch lists. To do this, click "Export List to CSV" on either the work list or watch list page of your choice. Extensive student information is included, including contact information, making this feature helpful for large-scale outreach campaigns.

The screenshot shows the 'STUDENTS' interface. On the left, there's a sidebar with 'Saved Lists', 'Advisor/Group', and 'Name the list:'. The main area has tabs for 'Work List (22)' and 'Watch List (0)'. Below the tabs, it says 'Show all students in institution' and 'Displaying Students 1-22'. A table of student data is displayed with columns: Risk, Student name, Cum. GPA, Notifications, and Last edit to profile. Three students are listed: Angelocci, Brooke N; Blondo, Genera K; and Bousum, Vyomini A. An 'Export List to CSV' button is highlighted with a red box in the top right corner of the table area.

Risk	Student name	Cum. GPA	Notifications	Last edit to profile
●	Angelocci, Brooke N ID: 188554345 Major: Accounting Add to watch list	2.68	3 current	Never Student Status: No action taken
●	Blondo, Genera K ID: 188871985 Major: Pre-Journalism Add to watch list	0.0	None	Never Student Status: No action taken
●	Bousum, Vyomini A ID: 189580373 Major: Film and Video	3.81	3 current	Never Student Status: No action taken

A maximum of 2000 students may be exported at a time; your institution will set the limit. If there are more than the permitted number of students in your list, the Export List to CSV link will not work. The number of students that may be exported at one time is limited to avoid slow response time. Tip! If you need to export more than a few thousand students, use the last name filter to break the list up alphabetically, then merge the lists after exporting

Performing a Mail Merge Using an Exported List and Outlook (for in-depth instructions, see Microsoft's website or minute 38:10 of the "Developing Effective Outreach Strategies with Excel and SSC Student Data" webinar on eab.com)

1. Create a template email in a word document, including placeholders in chevrons (e.g., «STUDENT FIRST NAME») that indicate where the unique student information will appear in each copy of your email. If you use the column titles from your excel worksheet, you will not need to map placeholders to column titles.
2. In the Mailings tab, select Start Mail Merge > Email Message
3. To connect the email message to your SSC work list, select Select Recipients > Use Existing List. Browse to find the saved excel document on your computer, select the correct tab (if applicable), and click OK
 - Note: you may not notice any changes, but if you are now able to click on Edit Recipient List, then the connection was successful
 - If you only want to email a portion of your SSC work list, use Edit Recipient List to exclude specific students
4. For each placeholder in your message, highlight the placeholder and select Insert Merge Field > Database Fields > the column of information you want to use > Insert > Close
5. Preview your messages to make sure the personalized details appear correctly for each student
6. Select Finish and Merge > Send Email Messages. At this point you will be asked for the data field/column in your excel spreadsheet that contains the email addresses of your students and for a subject line for the email. Choose something attention grabbing and click OK.