Advising Adventures:
The Utilization of Data and the Creation of an Advising Scorecard
Palo Alto College

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Presentation Overview

- Palo Alto College Demographics
- Case Management at Palo Alto College
- Advising Goals (KPIs, Unit Plans, Scorecard)
- Why an Advising Scorecard
- Components of a Scorecard
- Advising Outcomes
Overview of Palo Alto College

- Two-Year Public Comprehensive Community College
- Location: South San Antonio, Texas
- Accredited by SACSCOC (Southern Association of Colleges and Schools Commission on Colleges)
- Degrees Awarded: Associate of Arts, Associate of Science, Associate of Art in Teaching, Associate of Applied Science, and Certificates
Overview of Palo Alto College

- 19% Full-time, 81% Part-time
- 60% Female, 40% Male
- Ethnicity:
  - 78% Hispanic
  - 17% White
  - 3% African-American
- 71% of First Time in College Students (FTICs) require some level of developmental education
- 62% on Financial Aid Assistance
- 53% Economically Disadvantaged
Case Management at PAC (Structure)

- Three (3) Advising Centers on campus
  - Certified Advisor Caseload (350:1)
  - VA One Stop Center
- Advising Centers are defined by AlamoINSTITUTES (Program Pathways)
- Peer Advisors assigned to each Advising Center
- Students are assigned to a Certified Advisor their initial semester
- Advisor-Advisee Meetings
  - Appointments (90%) vs. Walk-Ins (10%)
Student Success Management Plan

Weekly and Bi-Weekly contact focused on persistence, retention, and completion:

- Welcoming all FTICs and Returning students via telephone and email
- Informing students of upcoming deadlines and campus events
- Advising appointments for 15, 30, and 45 hour milestones
- EDUC1300 classroom presentations (Individual Success Plan and My Mission Statement)
- Advising Month (October and March)
- Graduation Applications
- Transfer Intent
- Financial Aid Applications, Appeals, and Satisfactory Academic Progress
Questions to consider?

- If your college has an assigned advisor or case management system in place, how does it function?
  - True Case Management?
  - Mandatory meetings?
  - Come as you please?
  - For registration purpose?

- Do your advisors clearly understand their goals in relation to unit and college goals?

- Can an Advisor clearly identify their success or improvements needed within their caseload?
Palo Alto College Advising Goals

- Increase First Time, Full Time Persistence Rates
  - Baseline Rate: 59.2% (FA 2012 FTIC)
  - Goal = 68.7%

- Increase 3-year and 4-year Graduation Rates
  - Baseline Rate: 9.6% (3-year 2009 F/T FTIC cohort)
  - Goal = 26.6%
  - Baseline Rate: 13.3% (4-year 2008 F/T FTIC cohort)
  - Goal = 29.5%

- Increase Advisor Caseload Contact Ratio
  - Baseline Rate: 69% (SP 2016)
  - Goal = 5% Increase
Radical Innovation Process, Evolution of the Advising Scorecardcard

- **Discovery (2014)**
  - AlamoADVISE Launched
  - Components of Scorecard developed by Certified Advisors
  - Outcomes Assessment

- **Incubation (2015)**
  - Data Analyst developed Advising Scorecard 1.0
  - Scorecard presented to Executive Team and Certified Advisors

- **Acceleration (2016-2018)**
  - Advising Scorecard Aligned with Key Performance Indicators
  - Scorecard Aligned with Advising Unit Goals and SMART Goals
  - Scorecard 2.0 Developed
Why an Advising Scorecard?

- Data Informed, Students First
- Defines what success means for a Certified Advisor, Advising Center, and Advising Services
- Builds a comprehensive overview of a Certified Advisor's caseload (350:1)
- Alignment with College Key Performance Indicators
- Comparative caseload data
- Highlights and opportunities for improvement
Data Components of Advising Scorecard

- **Success Rates**: Percent of Caseload that earned an A, B, or C (PGR), Failure Rate, Completion Rate & Withdrawal Rate
- **Semester to Semester Persistence**: Students persisting from Fall to Spring or Spring to Fall
- **Fall to Fall Persistence**: Students persisting from Fall to Fall
- **Caseload Contact Rate**: Percent of caseload that has been advised by Certified Advisor
- **Graduation Rate**: Percent of caseload that graduated in a particular semester
- **Early Alert Rate**: Percent caseload that had a Level II Early Alert submitted
- **Academic Standing**: Percent of caseload in good standing, on probation, or on dismissal
Food for Thought? What do Advisors want to know about their caseload?

- Who are my students
  - Demographics
  - Programs of Study (Majors)
- Visits
  - Who coming in to see me?
  - Who’s not?
  - Who need to see me?
- Success
  - How are my students doing in class?
  - Who’s persisting, who’s not?
  - Academic Standing?
  - Who’s withdrawing?
  - Who’s graduated?
Advising Scorecard: Sample

Advising Scorecard: Student Contact

Semester
Fall 2017

Advising Center
SEED

Student Contact By Advisor

% of Caseload Contacted • % Good Academic Standing • % Academic Probation • % Academic Dismissal • % Other Academic Standing
Advising Scorecard: Sample

Live Demonstration of Software
Linking Smart Goals, Unit Goals, & KPI’s

Smart Goals (Individual)
Increase caseload contact by 7% from 68% to 75% by then end of Fall 2017 semester (Dec 15th).

Unit Goals (Advising Department)
The SEED Advising Center, will increase student contact ratio by 5% for Fall 2017 (Baseline 70.2%).

Key Performance Indicators (College)
Increase Fall-to-Fall FTIC Persistence
Smart Goal & Advising Unit Goal Review

Purpose: This review is to help support, understand, and enhance individual smart goals, advising unit goals, and college key performance indicators (KPI's) in relation to the Academic Advising experience.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
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</table>
| College Key Performance Indicators (KPI's) | FT FTIC Persistence: 62.8%  
Graduation Rate: 21.3%  
6 Year Transfer: 17.6% |
| Unit Goal | Unit Goal # 2. The ________ Advising Center, will increase student contact ratio by 5% for Fall 2017 and Spring 2018 (Baseline, Fall 2016 advising scorecard caseload contact ratio _____% & Spring 2017 advising scorecard caseload contact ratio). |
| Current Fall 2016 Contact Ratios | C.A Contact Ratio: ______  
_______ Advising Center Contact Ratio: _______  
PAC Overall Contact Ratio: _________  
PAC Highest Contact Ratio: __________  
PAC Lowest Contact Ratio: __________ |
| Individual Contact Goal | Increase caseload contact by ____% from ___% to ___% by the end of Fall 2017 semester (Dec. 15). |
| Resources (How can we support/help?) | 1.  
2.  
3.  
4.  
5. |
| Accountability (How will progress be measured or supported? Ex: Bi-weekly or Monthly meetings) | Plan or Date: |
| Comments: | (Additional information that was discussed or amended to Unit Goal Review) |
| Team Agreement: | Certified Advisor: ___________________________  
Team Leader: ___________________________  
Director of Advising: ___________________________  
Date: ___________________________  
Date: ___________________________  
Date: ___________________________ |
## Advising Outcomes: CCSSE Results

<table>
<thead>
<tr>
<th>Student Engagement Domain</th>
<th>2011</th>
<th>2013</th>
<th>2015</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active &amp; Collaborative Learning</td>
<td>48.9</td>
<td>49.4</td>
<td>48.2</td>
<td>49.4</td>
</tr>
<tr>
<td>Student Effort</td>
<td>49.0</td>
<td>49.3</td>
<td>50.6</td>
<td>55.8</td>
</tr>
<tr>
<td>Academic Challenge</td>
<td>48.7</td>
<td>46.7</td>
<td>46.5</td>
<td>51.6</td>
</tr>
<tr>
<td>Student/Faculty Interaction</td>
<td>48.4</td>
<td>50.1</td>
<td>48.3</td>
<td>53.0</td>
</tr>
<tr>
<td>Support for Learners</td>
<td>53.2</td>
<td>53.9</td>
<td>51.7</td>
<td>58.2</td>
</tr>
</tbody>
</table>

Source: ACD IRES- KPI Benchmark Rpt., CCSSEE Benchmark Reports
Advising Outcomes: Advisor Caseload Contact (Two-Way Communication)

- Spring 2016: 69%
- Fall 2016: 73%
- Spring 2017: 75%
Advising Outcomes: Fall Semester Advising Visits

- 2014: 4539
- 2015: 6514
- 2016: 6291
- 2017: 6641
**Advising Outcomes:**
**Fall 2017 Student Learning Outcomes (SLOs)**

<table>
<thead>
<tr>
<th>Question</th>
<th>Strongly Agree/Agree</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand how to develop and follow an ISP/degree plan/transfer plan and certificates</td>
<td>80%</td>
<td>473/593</td>
</tr>
<tr>
<td>Understand critical policies and dates</td>
<td>86%</td>
<td>512/596</td>
</tr>
<tr>
<td>Value the Advisor/Student relationship</td>
<td>89%</td>
<td>495/596</td>
</tr>
<tr>
<td>Value the completion of the educational pathway</td>
<td>85%</td>
<td>507/595</td>
</tr>
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Advising Outcomes: Full-Time FTIC Fall-to-Fall Persistence

Source: THECB Almanac
Advising Outcomes:
Part-Time FTIC Fall-to-Fall Persistence

Source: THECB Almanac
Advising Outcomes:
Full-Time Three-Year FTIC Graduation Rates

Source: THECB Almanac
Advising Outcomes:
Part-Time Three-Year FTIC Graduation Rates

TRIPLED since 2009

Source: THECB Almanac
Advising Outcomes: Full-Time Four-Year FTIC Graduation Rates

Source: THECB Almanac
Advising Outcomes:
Part-Time Four-Year FTIC Graduation Rates

Quadrupled since 2009

Source: THECB Almanac
Advising Outcomes:
Degrees and Certificates Awarded

53% INCREASE since 2013
Contact Information

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Thank You.