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# At-Risk Intervention in Student Support

A proposed training to support Success Specialists in our mission to maximize student outcomes.

**PREPARED BY**

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## **Executive Summary**

This document proposes a new training initiative for Success Specialists working remotely to support our students. To date, our support model has been reactive, and as a result missed out on opportunities for pre-emptive, personalized support toward students who may be struggling. This knowledge, in addition to the recent decline in outcomes, prompts the need for an assessment of the existing training around support initiatives.

### **I. Introduction**

By defining the characteristics of at-risk students, reviewing the gaps in our current support model, and compiling the existing resources for training, we move towards a plan to fill a skill and confidence gap in our Support Specialists.

Our support team, while remote, is uniquely situated to support one another's advancement and confidence in the area of student advising. By leveraging existing team members' knowledge, and creating a 'sandbox' environment, this training will create a new space for social learning and skill development.

By nature, the performance environment for this position requires specialists to navigate unpredictable and potentially escalated phone conversations. The aim here is to approach this training with an understanding of the systems currently in play in our culture, as well as the students. This analysis will ground a fully informed training.

### **II. Instructional Treatment**

This training module will feature three asynchronous modules on Canvas that introduce the three core concepts—how to diagnose the potential cause of at-risk behavior, how to 'treat' it with SMART goals, and actionable solutions, and how to monitor student behavior after the intervention.

To achieve our stated goal of increasing the confidence and efficacy with which specialists reach out to struggling students, practice sessions define the bulk of the training. Throughout these sessions, the support manager will review submissions and create opportunities for feedback and development. The final assessment will feature an intervention plan for a 'real' at-risk student.

### **III. Implementation and Evaluation Plan**

To achieve this training while providing adequate space for reflection and feedback, these modules should be scheduled over the course of three-four weeks. Before the training officially begins, and after, the specialists will complete a survey measuring their sentiment, as well as a post-training evaluation of the overall presentation. Targeted students will then be observed for increased outcomes.

# **At-Risk Intervention in Student Support**

A learning module by Julianna Donaher

## **I. Introduction**

### Statement of Need & Project Background

This training underpins company-wide efforts to address below-target outcomes in online courses. Our analysis has outlined the following key behaviors of students who have eventually exhibited those low outcomes by 1) failing their coursework or 2) exiting their course before completion:

- 0 Quizzes completed in the first 2 weeks of study.
- Inconsistent or no completion of course content (including Lectures, Active Learning, Problem Sets, and Practice Sets).

The above behaviors indicate students who are “at-risk” of losing their investment in our program and/or hurting their academic record.

The following research supports a theory that increased **Social Presence** and **Early, Personalized Intervention** with a student advisor may dramatically reduce the likelihood of negative outcomes in students exhibiting at-risk tendencies:

### **Social Presence**

- Studies have shown “a significant and positive correlation between the number of advising meetings and grades” (Mu & Fosnacht, 2019)
- “First-year students who felt that they had received good-quality advisement withdrew from public four-year institutions at a rate that was 25 percent lower than students who believed their advising to be of poor quality and 40 percent lower than students who reported that they had received no advisement” (Metzner, 1989).

- “Student assessments of their institution’s advising quality was positively related to both perceived gains and grades” (Mu & Fosnacht, 2019)

#### **Early intervention & Persistent Check-ins:**

- “Regular monitoring helps students keep abreast of their progress and allows for early interventions if they are not on track to graduate.”
- “Triggers are often activated only after grades have begun to slip— when it is too late to get the academic assistance they need before they fail or are forced to withdraw” (Purnell & Blank, 2004).

Based on the above learnings, this training supports the hypothesis that Student Support Specialists already employed by the company can dramatically impact outcomes, agnostic of expensive and time-consuming course updates.

**To date, however, these Specialists have experienced a framework of training that focuses on tools and processes, rather than on advising strategies to personally address at-risk students.**

For example, a specialist can confidently navigate the cohort transfer tool to re-arrange a student’s enrollments, and they can reproduce the necessary documentation to track that change—but when placed on the phone with a struggling student, they do not have the training to support meaningful intervention. While some Specialists do have a background in academic support environments, the significance of that experience cannot be measured and that background is not shared throughout the 7-person team.

This diagnosis was made through an assessment of existing training, the hiring profiles of the current team (detailed below in ‘Learner Analysis’), as well as observed behavior over the course of one year. To reach this hypothesis we also might specifically review the ratio of

outbound phone calls to student-initiated contact over the course of one month.

It's important to note: Student services at our company do not include reactive phone support. Outbound calls are optional, and to be used in the case of extenuating circumstances. While initiating a phone call or Google Meet with a struggling student is not outside the bounds of our policy or the position—**this level of intervention requires a Specialist to self-select into the process.**

In a typical month, students initiate approximately 1,500 emails, texts, or discussion community tags. **Specialist-initiated outbound calls average at a quantity of 3-5.**

This number, alongside an understanding of existing training and specialist backgrounds, suggests a lack of confidence and potential for efficacy around one of the most powerful tools we have yet to employ—personalized advising for at-risk students.

### Learner Analysis

All seven participants of this training have been fully onboarded, though very few have meaningfully interacted on the phone with students due to the current support structure mentioned above.

At present, the hiring process and onboarding for this position confirm that all participants have:

- Native English proficiency
- At least 3 months of experience executing the school's policies, brand, and mission
- Familiarity with the expectations of each course, and the rigor needed to pass it
- 1+ years in a customer service environment
- A high school diploma or higher

Observed Motivations and other affected characteristics following one year of monitoring:\*

- A feeling that getting on the phone with students (as opposed to maintaining email contact as specialists do with close to 100% of their students) feels like work for more qualified, “real” advisors.

*\*Additions may be made to this section following completion of the Pre-Module discussion introduced in the Progression of Instruction section below.*

Additional notes/observations:

- All specialists are remote and located across the US. They do, however, have a strong inclination for teamwork and supporting their colleagues.
- Specialists are comprised of a diverse range of ages, ethnic backgrounds, gender identities, and sexual orientations. Anecdotally, the age range falls between about 21 and 40 years of age.

### Performance, Learning, and Cultural Context

Performance: This training will allow specialists to practice scenarios within video calls and phone calls that occur while intervening on behalf of an at-risk student. By default, the performance environment will:

- Feature unpredictable student behavior and questions
- Varying degrees of willingness to participate in the conversation and solution brainstorming
- Present technical difficulties
- Failures to read and assess tone and meaning across cultures, age ranges, and personalities
- Challenging conversations with potentially defensive students.

To support understanding of this environment, the training will feature elements of existing resources from [The Global Community for Academic Advising \(NACADA\)](#), [UC Berkeley: Advising Strategy + Training](#), as well as other resources provided by UC Berkeley, [here](#).

Learning: The training environment will therefore need to exist within the eventual performance environment. It will:

- Include multiple opportunities for role-playing in a Google Hangout. Specialists will be partnered and will take turns playing their roles (student or agent). In these scenarios, one “Student” will always have a previously provided script that introduces some of the above scenarios.

Cultural: By observing this team for one year, I have made the following observations about the culture and values in play:

- Because all seven specialists are on equal footing but have very different backgrounds and experience levels, a strong emphasis is placed on collaboration and reliance on the group mind and memory.
- As a result of this highly collaborative process, the locus of ownership can be evasive, and some projects or high-need cases can fluctuate between responsible parties. Without that ownership initiative is not taken, but rather passed to a seemingly more qualified peer.
- Due to limited intervention experience, at-risk students sometimes are met by specialists with frustration and judgment.
- The team is well-bonded through the incredible challenges this position fields.



In addition to the developing project that assigns at-risk students to an individual specialist for scheduled check-ins, as well as the ongoing initiative to create more time for outbound phone calls—the following Instructional Goal is proposed:

**This training will increase the confidence and efficacy with which Student Support Specialists are able to support online students who are at risk of failing or exiting their degree coursework.**

## **II. Instructional Treatment**

### Progression of Instruction

To prime this conversation and best shape the training to meet the needs of its participants, a pre-module, 30-minute discussion amongst all seven participants will take place a minimum of two weeks before the training begins. The discussion will be facilitated by the course designer and will not include Support Managers or Leadership.

The goal of this discussion is to:

1. Create a comfortable space to discuss any emotions around the prospect of interacting up to 20 hours a week with at-risk students.
2. Walk away with additions or edits to the modules outlined below, based on the expressed concerns (or lack of concerns!) of the Specialists.

After this discussion and the implementation of any needed edits, the training will proceed as outlined below:

To accomplish the instructional goal, this three-module, hybrid training will first model how to

1. **Diagnose** the root cause of at-risk academic behaviors,
2. **“Treat”** the cause with action plans, and
3. **Monitor** the students.

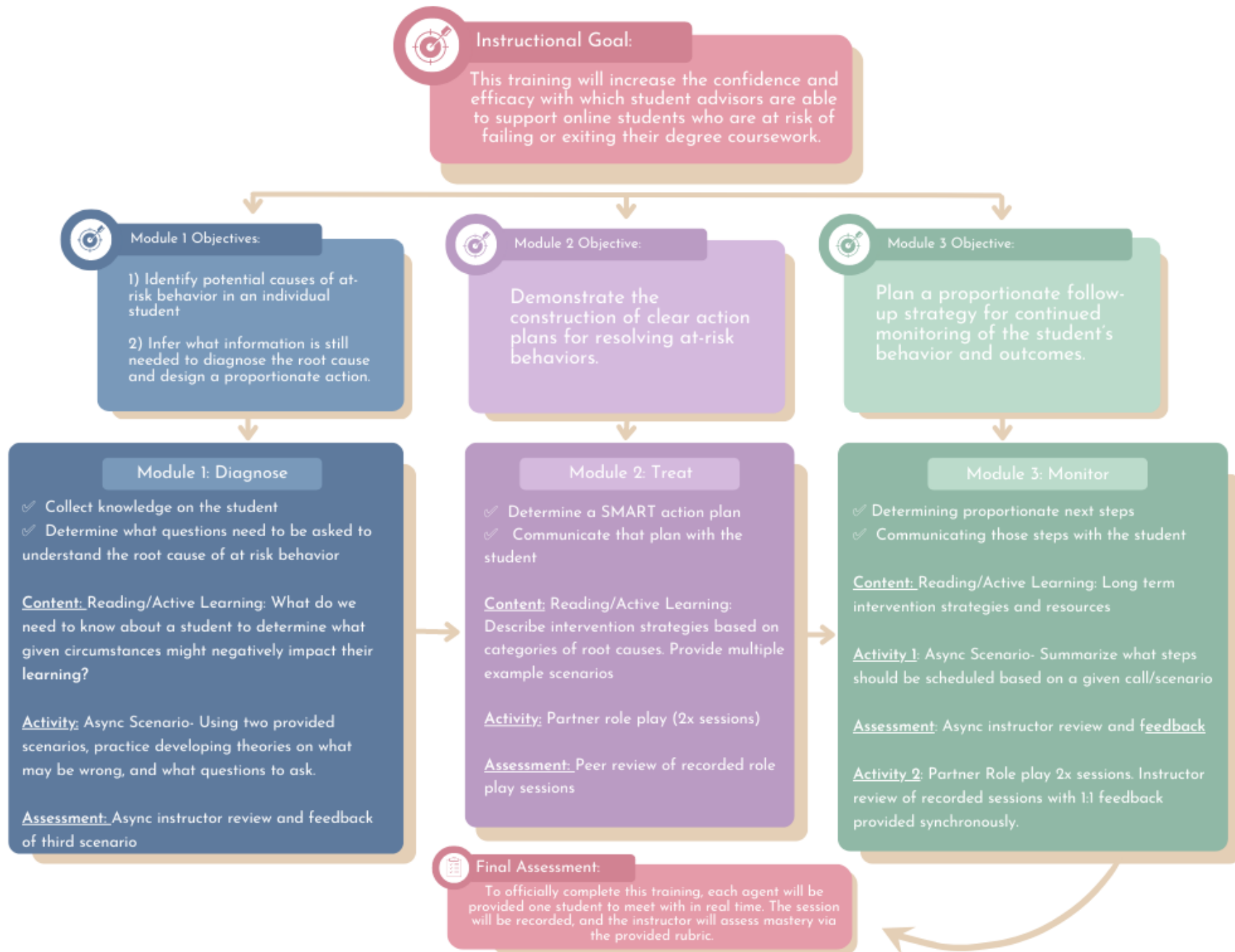
Each step will be reflected in a module that builds on the former and guides the learner through the chronological process of information gathering, assessment, and development as they will with the students in their portfolio. Most importantly, this training will feature multiple opportunities to practice these skills and receive feedback on their theoretical implementations.

Each module will include both activities and assessments that directly mirror the environment of practice. Some asynchronous activities and assessments in Canvas will prompt information gathering and diagnoses, while others will include role-played scenarios in which learners are partnered and take turns playing the role of the student.

In support of these role-playing scenarios, elements of the following resources will be included:

- [NACADA's Concept of Academic Advising](#)
- [NACADA's Core Values of Academic Advising](#)
- [NACADA's Academic Advising Core Competencies Guide \(Abridged\)](#)
- [Advising is More Than a Yes/No Business: How to Establish Rapport and trust with Your Students](#)
- [The University of California's Tactical Guide to Success Coaching: Growing as a Coach](#)
- [UC Berkely's Workshop series: Building Your Socioemotional Competencies: How Your Self-Reflection Can Foster Students' Sense of Belonging and Empowerment](#) (video)

The asynchronous models are approximately 1 hour each, but it is recommended that the modules be completed incrementally and that the training be staggered over three weeks time to allow for scheduled role-play sessions, and review. (See the 'Implementation Plan'). Please see below for a visual representation of the content outlined above.



Aligned Learning Outcomes, Assessments, and Teaching/Learning Strategies

*Note: Going forward, this document will focus on Module 1 details. Modules 2&3 will be added following stakeholder feedback.*

Module	Outcome	Assessment	Strategies	Technology
1	Identify potential causes of at-risk behavior in an individual student.	Read 3 <b>Student Scenarios</b> and accurately distinguish what, of the provided details, may point to the root cause of the at-risk behavior.	Students are encouraged to expand their inquiry and investigate the causal relationship between reported stimuli and recorded statistics on student performance.	A <b>Canvas quiz</b> presenting a scenario, and multiple choice answers to select the root cause of at-risk behavior in the scenario.
1	Infer what information is still needed to diagnose the root cause and design a proportionate action.	Compose 2-3 follow-up questions that you will need to ask in a phone call to confirm your theory.	Identifying gaps in knowledge will facilitate the beginning of strategy on a student phone call. This module will also prompt reflection on the learnings still to come.	A <b>Canvas quiz</b> with text entries and form completion (and list three additional questions you might ask)  A <b>Canvas rubric</b> will be used to provide grading for both of the assessment pieces in Module 1

Lesson Plan: Module 1 – Diagnose

<b>Gagne's Events of Instruction</b>	<b>Estimated Duration</b>	<b>Instructional Activities</b>
Gain Attention	<i>1-minute</i>	Asynchronous Module: Written welcome statement including a review of team strengths and opportunities.
Inform Learners of the Objectives	<i>&lt; 1-minute</i>	Asynchronous Module: State module objectives (as listed on the content map on page 8) at the beginning of each module.
Stimulate Recall of Prior Knowledge/Learning	<i>5 minutes</i>	Asynchronous Module— Writing Exercise: Reflect in the space provided on a student interaction you had or wish you had had:  What could've gone better? What information did you wish you had going into the interaction? Where is that student now?
Present the Stimulus (content or learning activity)	<i>15 minutes</i>	Asynchronous Module— Read and Watch: <ul style="list-style-type: none"> <li>Lecture: "What's wrong? Diagnosing obstacles in online student learning" (references <a href="#">NACADA's Core Values of Academic Advising</a>)</li> </ul>
Provide Guidance to the Learners	<i>5 minutes</i>	Asynchronous Module— Review an example of 1 Student Scenario, and the Pre-Call notes, and Pre-Call questions that followed it.
Elicit Performance from the Learners	<i>5 minutes</i>	Asynchronous Module— Read a second <b>Student Scenario</b> and accurately distinguish what, of the provided details, may point to the root cause of the at-risk behavior.  Select from the multiple-choice options available.
Provide Feedback to the Learners	<i>&lt; 1-minute</i>	Asynchronous Module— The module will provide notes for the correct answer, as well as hints in response to incorrect answers.
Assess the Performance of the	<i>20 minutes</i>	Asynchronous Module— Given a provided Student Scenario, <ol style="list-style-type: none"> <li>1) write your Pre-Call notes and</li> <li>2) Compose 2-3 follow-up questions that you will need to ask</li> </ol>

Learners		in a phone call to confirm your theory.
Enhance the Retention & Transfer of the New Skills, Knowledge, and/or Attitudes	<i>10 minutes</i>	The Support Manager will review the Pre-Call Notes and follow-up questions submitted in the Asynchronous module. Based on the provided rubric (assessing clarity, detail, and accuracy), a score will be provided and notes will be submitted via Canvas on strengths and opportunities for improvement.
Evaluation	<i>2 minutes</i>	As a formative assessment, specialists will be prompted to indicate their understanding of the content of the module using a smile scale: <i>How confident do you feel performing the objectives of this module?</i> (Submission will not be anonymous and the manager will need to check in following lower scores to assess and document outstanding questions)

Note: *Learners will be prompted for a full evaluation after Module 3, see page 17.*

#### Assumptions about Learning, Theory Base, and Pedagogical Approaches

These modules are defined by elements of Cognitivism and the accompanying assumption that learning is based on the development of existing schemata, or “unit[s] of knowledge, understanding, and skill.” When new information is presented it builds and adapts the schematas already existing based on prior knowledge. This design assumes that the most effective lesson plans create structures built on essential questions to trigger recall and association with prior knowledge and understanding.

Support specialists in this environment, are exceptionally well-situated to empathize and identify characteristics of student behavior— this is built into their hiring process. This training, therefore, exists to help build upon that prior knowledge, and apply it to quantifiable action plans that accomplish the desired outcomes of this school (Clark, 2018).

Lastly, aspects both preceding the module, throughout its elements, and in the Evaluation and Reflection segments (discussed further in the Evaluation Plan), lean heavily on the benefits of Social Learning. Partnered role-play elements will create meaningful opportunities to “observe, model, and imitate the behaviors, attitudes, and emotional reactions of others” (McLeod, 2016).

### III. Implementation and Evaluation Plan

**Dates:** 7/11-8/8

**Facilitator:** Julianna Donaher

**Total Training Duration:** 5 hours and 15 minutes

**Individual Asynchronous Modules:** 1 hour each

**Training Site:** Remote: Google Hangouts, Canvas

Training Preparation for Anticipated Audience of 7 Learners:

Prerequisites:	Instructional Equipment:
3 Months Reactive FTE Student Support Experience	Canvas Instructor Login
Completed Training: Zendesk Overview	Macbook Pro, Monterey 12.4 (or later)
Completed Training: Outbound Calls in Zendesk	Up to date, Google Chrome
Completed Training: Intro to Our Courses	
Completed Training: Navigating the Admin Dashboard	
Completed Training: Airtable 101	

Each asynchronous module will be presented via Canvas and complemented by live, peer-to-peer Practice Sessions (or ‘role play’). Specialists will be scheduled for the following training times:

## Pre-Training

- Within two weeks of the first scheduled work blocks, all specialists will participate in a 30-minute Google Hangout (or “Pre-training Touchbase) with the course designer to reflect on existing sentiment and formulate adjustments to the training.
- Prior to this session, they will complete a Pre-Training survey measuring their confidence in At-Risk Intervention.

## During the Training (Asynchronous):

- Throughout the training, three, one-hour blocks to complete the asynchronous modules will be scheduled.
- After the third asynchronous module is completed, specialists will complete a full course evaluation to be reviewed by the designer and stakeholders.

## During the Training (Synchronous):

- During Modules 2 and 3 (Beginning in the second week, but continuing into the third), specialists will be partnered randomly with two of their teammates
- Two, 15-minute sessions will be scheduled with each partner to enact the role-playing activities.
- Pending approval of the manager, during the fourth week, the specialist will complete an Analysis, Pre Call Notes, Scheduled Call, and Follow-Up plan with an enrolled, at-risk student.
- The manager will review the recording of that meeting, as well as the notes and follow-up plan. The manager and specialist will meet to discuss any feedback.
- If the manager completes a provided rubric with a passing grade, the specialist will have passed the training.



### Post-Training:

- Following this end of the training, Specialists will complete a Post-Training survey measuring their confidence in At-Risk Intervention.

\*Note: While the Canvas Module completion is referred to as ‘asynchronous,’ the manager will need to work with each team member to fit their work blocks into their existing schedule of tasks.

### Evaluation

To measure the success of the training, the following two areas will be assessed:

Area of Assessment	Method of Assessment	How are we defining success?
Specialist <b>confidence</b> in proactively Intervening in the progress of an at-risk student.	Before beginning the first module, and following their final feedback meeting with their manager, Specialists will complete the same survey featured below.	Specialists' responses average at a $\geq 5$ point change for questions 1-2.  At least 75% of specialists answer ‘Yes’ to question 3.
The <b>efficacy</b> with which specialists can convert an At-risk student to an On-track student.	Course Outcomes will be observed in one-month intervals, for one year following the completion of this training for all 7 team members.  Students who experienced this feature will have a tag added to their account, allowing Analytics to pull unique reports each month.	Outcomes increase between 5% and 10% among students who experienced targeted intervention.

### ***Pre and Post Training Survey Questions:***

How likely are you to proactively call a student who you’ve noticed is considerably behind in their course?

1 (unlikely) - 10 (extremely likely)

How confident do you feel that you are the person to make meaningful changes in a student’s

course progress?

1 (not at all confident) - 10 (extremely confident)

Do you feel prepared to assess a student's obstacles and create a plan of action to resolve them?

Yes/ No

In addition to the above survey targeting change in attitude and sentiment, and the data analysis of relevant student outcomes, specialists will also complete the survey below. This survey will be converted into a Typeform that can be completed asynchronously and anonymously. It will be included as a link at the end of their third module in Canvas:

1.	The instructional materials provided the learner with all the information required to master the desired outcomes.	1	2	3	4	5
2.	The instructional materials were complete and nothing was missing.	1	2	3	4	5
3.	The information presented was easy to read and/or view, and to understand.	1	2	3	4	5
4.	The instructional materials were engaging and motivating.	1	2	3	4	5
5.	The instructional materials were easy to navigate and use.	1	2	3	4	5
6.	The tasks and information presented will be easy to implement in real life.	1	2	3	4	5
7.	The instructional materials provided the learner with all the information required to master the desired outcomes.	1	2	3	4	5
8.	The instructional materials were complete and nothing was missing.	1	2	3	4	5
9.	The information was structured and organized in a way that made it easy for me to access and retrieve what I needed.	1	2	3	4	5
10.	The instruction allowed me to easily recover from errors (if any occurred).	1	2	3	4	5
11.	The actions required to complete each task were intuitive and clear, and I easily accomplished them.	1	2	3	4	5
12.	The structure and layout of each screen was consistent and easily understood.	1	2	3	4	5
13.	The visual design elements (colors, graphics, and photos) were pleasing, the images and text were of sufficient size, and the layout offered sufficient contrast to distinguish important information.	1	2	3	4	5
14.	The home screen menu options were logical and there were no other options I thought should be included on the screen.	1	2	3	4	5
15.	The final assessment was not too difficult or too easy, and the questions covered information I thought was important.	1	2	3	4	5
16.	The training prepared me to do well on the final assessment.	1	2	3	4	5
17.	I feel prepared to apply what I learned from the instruction in my work or career.	1	2	3	4	5
18.	The information presented was correct and did NOT include any errors.	1	2	3	4	5
19.	I easily located the additional resources necessary to complete required tasks.	1	2	3	4	5
20.	Did the training provide too much or too little information? If so, please describe.					
21.	Are there other items you think should be provided or linked to from the training site?					
22.	What part of the instruction did you like best?					
23.	What part of the instruction did you find confusing, or did you like the least?					
Additional comments:						

## **IV. Conclusion**

The above sections outline a proposed training to better prepare our support team in their mission to optimize student outcomes. The training is designed to iterate according to both stakeholder feedback, as well as learner input. Changes are expected and recommendations are welcomed. Please reach out directly to [donaher.j@northeastern.edu](mailto:donaher.j@northeastern.edu) by 7/1 to provide questions, comments, and concerns.

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