**Inactive Student Process**

**Overview**

When we admit students to Bottom Line's Success program, we commit to supporting them for 6 years or until they earn their degree. For this reason, all students are included in our organizational outcomes data, including those who are not currently active participants in the program.

At the same time, we want to make sure that advisors' limited time and energy is spent on students who are engaged and want to make progress toward their degree. For this reason, a student who is consistently not engaging or who is no longer a good fit for the program may be removed from their advisor's caseload. These students will remain inactive until they re-engage or ask for help to get re-enrolled.

Our inactive process is in place to help our advisors focus their time, while at the same time pushing us to uphold our promise to students by giving them ample opportunity to get back on track. We do not make these decisions lightly, as we know that students who become inactive are less likely to graduate with their degree.

**Inactive Dashboard**

The [Potential Inactive Students dashboard](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/2e03844e-08a5-4c59-8a82-4a77caae5d00/ReportSection3dd75aa1157b823ca6b7) is designed to give managers and advisors a student-by-student look at the students who are at risk of becoming in active due to their enrollment status and/or engagement.

Toggle by fall/spring and use the "Fall Recommendation" and "Spring Recommendation" slicers to see which students are at risk of becoming inactive at the end of the respective semester.

**Real-Time Updates**

If an advisor brings a student to their manager's attention who meets one more of these criteria, the student’s stage should be changed to inactive.

The student:

* Has specifically and repeatedly asked that BL no longer contact them and offer support
  + *The manager should make at least 3 attempts to connect with the student and find out why they no longer want to participate in Bottom Line and whether there’s any more context we can give them or accommodations we can make to keep them engaged*
* Has informed us that they will be dropping out of college with no plans to return (e.g. if joining the military)
* Has engaged in misconduct (e.g., Illegal activity)
* Has repeatedly refused to follow the suggested action plan

**How to make the change:**

Advisor: select the appropriate reason from the "[Reason Inactive](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#reason-inactive)" dropdown

Manager: find the student on the Inactive Candidates list and change the stage to "Inactive."

* When changing students’ stages, do not make any changes to the advisor. Inactive students will be automatically removed from the advisor’s caseload.

**Monitoring Engagement**

Students may become inactive after one academic year of no engagement with Bottom Line. Managers are expected to monitor student engagement throughout the year and specifically check in with advisors on engagement at least once per quarter.

In order to identify students with no engagement, open the Advisor Dashboard and use the slicer menu to find students with "Fall Engagements" at 0 and "Spring Engagements" at 0.

If by winter assessments a student has had 0 meetings, managers will review the following checklist with the advisor to identify what follow-up is needed during the spring to re-engage the student.

Re-engagement strategies:

* Regularly (minimum of once per month) attempted to call and text all existing phone numbers (cell and home)
* Reached out by email, phone, and text prior to each of the typical school visits scheduled for the student’s campus
* Mailed one or more letters to the student’s home
* Attempted to contact siblings/parents to assess whereabouts or additional contact information
* Asked a manager or fellow advisor for assistance in contacting student
* Asked other advisor(s) who have a previous relationship with the student to contact the student
* Leveraged referral sources and partner programs where applicable
* Leveraged known friends as go between where appropriate
* Leveraged on campus contacts where appropriate to assess status

**After Assessments**

**After WINTER assessments,**

* Review the the [Potential Inactive Students dashboard](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/2e03844e-08a5-4c59-8a82-4a77caae5d00/ReportSection3dd75aa1157b823ca6b7) and review the students marked as "Inactive" and "Make inactive at manager's discretion" in the "Fall Recommendation" column
* Advisors should also make note of any students who have graduated with an Associates and are not planning to pursue a Bachelors Degree
  + Advisor or Manager: Add "Not Pursuing Degree" as the [Reason Inactive](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#reason-inactive)
* Manager: find the student on the Inactive Candidates list and change the stage to Inactive
  + When changing students’ stages to inactive, you must **wait until after winter assessments period is over**, and do not make any changes to the advisor. Inactive students will be automatically removed from the advisor’s caseload.

**After SUMMER assessments:**

* Review the the [Potential Inactive Students dashboard](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/2e03844e-08a5-4c59-8a82-4a77caae5d00/ReportSection3dd75aa1157b823ca6b7) and review the students marked as "Inactive" and "Make inactive at manager's discretion" in the "Spring Recommendation" column
* Advisors should also make note of any students who have graduated with an Associates and are not planning to pursue a Bachelors Degree
  + Advisor or Manager: Add "Not Pursuing Degree" as the [Reason Inactive](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#reason-inactive)
  + Manager: find the student on the Inactive Candidates list and change the stage to Inactive
    - ​​​​​​​​​​​​​When changing students’ stages to inactive, you must **wait until after summer assessments period is over**, and do not make any changes to the advisor. Inactive students will be automatically removed from the advisor’s caseload.
* Review the [Advisor Caseload dashboard](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/9af9f05e-4edd-4a10-a03b-5f8f3351146f/ReportSection66b46d488af9b8304719) to identify students who have had no engagements (0 meetings and 0 tasks) during the academic year. If throughout the year the advisor and manager together attempted to re-engage the student using **at least 3** of the methods listed above, student can be changed to inactive. Otherwise, the student should remain active and the advisor will take at least 3 of these steps.
  + Advisor or Manager: Add "Not Engaged" as the [Reason Inactive](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Program-Record.aspx#reason-inactive)
  + Manager: find the student on the Inactive Candidates list and change the stage to Inactive
    - ​​​​​​​​​​​​​​​​​​​​​When changing students’ stages to inactive, you must **wait until after summer assessments period is over**, and do not make any changes to the advisor. Inactive students will be automatically removed from the advisor’s caseload.

**Manager Discretion**

Advisors may also bring up additional students during assessments that they think should be changed to inactive (e.g. a student who met with an advisor once in September and we have not heard from them since). These are cases that should be discussed with your Program Director, and ultimately the regional program leadership team will make a decision about whether to keep the student active or change their stage.

When changing students’ stages to inactive, you must **wait until after assessments period is over**, and do not make any changes to the advisor. Inactive students will be automatically removed from the advisor’s caseload.

**Inactive Process FAQs**

**What if my student has only been unenrolled one or two semesters, but I think they should become inactive?**

Students who have not reached the three consecutive semester threshold can be changed to inactive only if they have specifically asked that BL no longer contact them and offer support (see [Real Time Updates](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Inactive-Student-Process.aspx#real-time-updates)).

**What if I have a not-attending student who is actively engaged in the program, but has switched to a non-degree granting certificate program?**

Ask your student if they plan on returning to an AA or BA degree-granting program. If they plan on returning to a two- or four-year school, be prepared to support them with the transfer or re-enrollment process.  
  
If they do*not* plan on returning to a degree-granting institution and are actively engaged in the program, ask them if they would like to remain in our Success program. If they would like to stay in the Success program, remember that you can still do most services with them (especially E, A, and L services).

**What if I have a student who technically has one engagement this year but is not actively participating in the program?**

We can consider making these students inactive on a case by case basis (see [Manager Discretion](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Inactive-Student-Process.aspx#manager-discretion)). Please let your Manager know why you think this student should be made inactive.

**What language can I use to reengage a student? How do I ask a student if they want to stay in Bottom Line without making them feel like Bottom Line is forcing them out?**

“Remember, your Bottom Line Advisor is available to support you with the following: anything related to academic skills or progress, career exploration or research, networking, connecting to job/internship opportunities, resolving bills, and applying for financial aid. We are also here to connect you to other resources and act as a sounding board.”

*\*Sharing the list of Bottom Line services is also helpful*

“How can Bottom Line be most helpful for you right now?”

**What should if I do if a student hangs up when someone from Bottom Line calls?**

Share the reengagement language and also the following sentence:

“If you prefer not to continue with us, we do understand and wish you the best of luck. Please do let us know if you are sure that you would not like to continue.”

**What do I do if a student is timing out of Bottom Line after six years and not graduating?**

Share the following language: “At Bottom Line, we can support students for up to six years. We’re at the six-year mark and won’t be able to work with you formally any longer, as we are getting ready to start working with a new cohort of students. However, our website has resources on resumes, interviewing, academics, and other tools at bottomline.org. I hope that you can take everything that you’ve learned in the past six years with us, and continue pushing forward and growing. If you do need something, you can call our office, and we may be able to help, but we believe in you and the skills you’ve gained, and know that you’re ready to take this over and work independently now.”

Develop a transition/next steps plan in your final meeting with the student.