Noel-Levitz®

The College Student Inventory™ Coordinator's Guide

The Retention Management System *Plus*™

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Table of Contents

Introduction

Welcome to the Retention Management System *Plus*™ (RMS *Plus*)

You're now a part of a group of dedicated RMS *Plus* professionals who are helping their campuses identify and respond to the motivational strengths and needs of their students. This community of educators uses the RMS *Plus* to inform both the individual and programmatic interventions for students making the transition to college.

This guide draws heavily upon the experiences of those RMS *Plus* professionals whose institutions have enjoyed success with this program. We're confident you will benefit from their insights as you assume your role as your institution's RMS *Plus* representative. Additional information is available to you at the client resource site of *my*Noel-Levitz (www.noellevitz.com/RMSclient).

As you work through the implementation of the Retention Management System *Plus* for your college or university, contact Noel-Levitz retention solutions team at any point.

What is the Retention Management System *Plus*?

The Retention Management System *Plus* (RMS *Plus*) refers to a combination of analytics, assessment tools and a data dashboard that are designed specifically to support increased completion rates through earlier, more focused student interventions. The RMS *Plus* provides a wealth of data to make interventions more meaningful, more focused and more successful. Campuses choose to use one or a combination of the System offerings.

The RMS *Plus* provides critical information to promote student success, at the time you need it. You'll understand the strengths and challenges of each student, their receptivity, and be able to target your outreach and resources more strategically. More specifically, this proactive approach to student retention planning is designed to enable institutions to:

- Assess students' needs and strengths
- Identify students who may be at risk of leaving college
- Recognize students' motivational patterns
- Use information to implement successful referrals and intervention programs
- Enable advisors to have effective and rewarding contacts with students

The components of the Retention Management System *Plus* are:

- College Student Inventory™—Prioritize your interventions more efficiently by assessing the strengths and challenges of each student.
- Mid-Year Student Assessment™—Compare the strengths and challenges of your students at the mid-point of their first year and adjust your interventions accordingly with this follow-up survey.
- Second-Year Student Assessment™ —Extend and strengthen your interventions beyond the first year using this survey for second-year students.
- Student Retention Predictor™—Gauge the precise likelihood of each student persisting and the factors that may be putting them at risk.
- Retention Data Center™—Manage and analyze all of your student success data more strategically through this comprehensive online portal.

- Consulting—Understand how to interpret your results and use the data to guide your retention initiatives.

Benefits of the Retention Management System *Plus*:

- Intervene earlier with students, before they develop problems, giving you the maximum time to help them persist.
- Strengthen your student success efforts with data for program planning, development and implementation.
- Target your interventions more precisely, tailoring your programs to student needs using strengths-based data from the students.
- Assess multiple audiences with surveys for traditional, nontraditional (adult), first-year, and second-year students.
- Prioritize your interventions and focus on the students who need assistance the most.
- Connect students with the specific campus resources that will have the greatest effect on their success.
- See the likelihood of each student persisting when using the additional Student Retention Analytics.
- Access an online portal for analyzing your data, creating reports, and managing your retention assessments.
- Create customized reports for multiple campus audiences, including students, advisors, retention coordinators, and administrators.
- Improve student participation through easy survey administration and communication features.

This guide provides information about the College Student Inventory, the central component of the RMS *Plus*, a motivational assessment for first-year students.

Copies of the CSI (Forms A, B, and C, as well as the resulting reports generated from students' responses, can be found at www.noellevitz.com/RMSsamples.

1. The College Student Inventory (CSI)™

Background

The College Student Inventory is the foundation of the RMS *Plus* and was designed especially for incoming first-year students. In 1971, the author of the CSI, Michael L. Stratil, Ph.D., initiated his research in the area of academic and social motivation with the goals of:

- Creating a coherent framework for understanding human motivation in general;
- Identifying the specific motivational variables that are most closely related to persistence and academic success in college; and
- Developing a reliable and valid instrument for measuring these variables (Stratil, 1988).

When surveyed, CSI clients report that their use of the program results in increases in retention, improved satisfaction with advising, increased use of campus services, and increased student engagement. Further data from the program provide compelling justification for resources that support student success.

Motivational Assessment

A number of scales are constructed from the inventory items to provide a detailed view of each student's motivation, coping ability, and receptivity to assistance.

The Scales

The heart of the CSI rests with the independent motivational scales constructed for each of the categories above. The table below depicts the main categories and corresponding scales for each version.

Table 1. Scales for CSI Forms A, B, and C

CSI Form A	CSI Form B	CSI Form C
Academic Motivation		
Study Habits	Study Habits	Study Skills
Intellectual Interests	Intellectual Interests	Reading Habits
Academic Confidence	Verbal Confidence	Verbal Skills
	Math and Science Confidence	Math Skills
Desire to Finish College	Desire to Finish College	Commitment
Attitude Toward Educators	Attitude Toward Educators	Attitude Toward Educators
		Use of Technology

CSI Form A	CSI Form B	CSI Form C
General Coping Ability		
Family Emotional Support	Family Emotional Support	Personal Support
Sense of Financial Security	Sense of Financial Security	Financial Security
Openness	Opinion Tolerance	
Career Planning	Career Closure	Life and Career Planning
Ease of Transition	Sociability	
Receptivity to Support Services		
Academic Assistance	Academic Assistance	Academic Assistance
Personal Counseling	Personal Counseling	
Social Enrichment	Social Enrichment	
Career Counseling	Career Counseling	Career Planning
	Financial Guidance	Financial Guidance

Social Motivation		
Self-Reliance		
Sociability		
Leadership		

Versions

Three versions of the College Student Inventory are available: Form A, Form B, and Form C, originally published in 1988, 2000, and 2006 respectively. Table 2 shows the features of each version.

Table 2. Features of the Three Forms of the College Student Inventory

Version	Number of Items	Approximate Completion Time	Formats Available	Language
Form A	194	50 minutes	Paper	English
			Online	English and Spanish
Form B	100	30 minutes	Paper	English
			Online	Canadian, Spanish, and English
Form C	74	20 minutes	Online	English and Spanish

2. The CSI Coordinator Report

The CSI Coordinator Report is a one-page synopsis of each student's strengths, needs, and background.

The Summary Observations provide a preliminary overview of a student's levels of risk and receptivity, which helps you to prioritize your interventions. Though this sensitive information should never be shared with students, it may be shared with advisors and counselors at the coordinator's discretion.

Motivational Assessment allows advisors to identify the student's areas of greatest strength and need at a glance. The motivational scales are reported in two ways: as a percentile rank and with a bar graph.

Student Background Information provides a context for discussing motivational patterns within the scales.

Specific Recommendations for each student provide action steps based on need and receptivity scores. The strength of each recommendation is indicated by its priority score.

3. The CSI Advisor/Counselor Report

This report parallels the Coordinator Report with one exception: the Advisor/Counselor Report does not include the Summary Observations.

4. The CSI Student Report

This report parallels the Advisor/Counselor Report, but includes supplemental narrative that explains the student's score on each scale and is written in second person. Used during the individual student conference, this report validates the student's need for services.

5. The CSI Summary and Planning Report

This aggregate report provides planning data and contact lists that identify students with needs or interests in specific areas, such as:

- Students who are receptive to your interventions
- Students needing academic assistance
- Students who may benefit from career counseling
- Students who might benefit from personal counseling or support
- Restricted report (students who have responded "No" to the last item on the CSI)

6. The Integrated Summary Observations with Receptivity Report

This report provides an integrated view of your students' scores across the summary scales and the individual receptivity scales. Desire to transfer is indicated for students at four-year institutions only. In addition, the Excel table with your students' scores may be downloaded for additional filtering.

Students with percentile scores of 80 and above on one or more of the summary scales **and** scores of 65 and above on one or more of the receptivity scales are highlighted in the table. For these students, scores of 80 and higher on the desire to transfer are highlighted (four-year institutions only).

The CSI Coordinator

What are your initial responsibilities?

As CSI coordinator, you are the point person for facilitating the successful implementation of this motivational assessment and intervention program. The following questions can guide your planning as you prepare for administering the College Student Inventory:

- Which incoming students should complete the CSI?
- How do we acquire the materials we will need?
- How do we administer the CSI?
- How do we schedule the CSI administration to ensure maximum student participation?
- How do we create a suitable environment for students who are completing the inventory?
- Who should administer the CSI?
- How do we process the completed inventories?

Which incoming students should complete the CSI?

First, identify the group(s) of students who will complete the inventory. Below are some suggestions to help you with this decision:

- Assess those students who would benefit the most from intervention.
- If possible, include all entering students (first-year students and transfers), since new students and first-year students, in particular, have the most acute needs.
- Developmental or underprepared students are among the student sub-groups that benefit from the CSI.
- Academically prepared students should not be overlooked. Many have personal challenges that may interfere substantially with their school performance.
- You may wish to target students who scored high on their aptitude test, but who earned a low high school G.P.A., as well as developmental students.
- Your target group simply needs to include whatever segment of your student body you believe has the most to gain from the program.

How do we acquire the materials we need?

Next, you will need to purchase the necessary materials for administering the CSI.

- If you are using the *paper* version of the CSI, ensure that each student has a CSI booklet, a CSI answer sheet, and a sharpened number two lead pencil.
- If you are using the *online* CSI, ensure that you have completed an order form and are clear on the procedures within the Retention Data Center for setting up your online survey administration and access to reports, including the auto-generation of your URL, customizing your administration with a campus logo, inserting a supplemental campus-specific paragraph for the written interpretation of your student reports, and assigning permission rights for viewing and accessing reports.
  - We recommend calling Noel-Levitz at 800-876-1117 to review your plans.
  - Technical support is available at RMS-tech@noellevitz.com to assist you in setting up your online administration through the Retention Data Center at *my*Noel-Levitz.
- Through the *my*Noel-Levitz RMS *Plus* client resource site, you can access the CSI Advisor's Guide and the CSI Resource Guide via a PDF. Then share this file with your advisors who will be discussing the CSI results with students.

How do we administer the CSI?

The next step is choosing the method(s) of administering the CSI. Several possibilities are offered for your consideration.

- Administer the CSI during summer orientation programs. This is an excellent method because results are in and advisors will be ready to discuss students' needs the very first week of the term.
- If your institution has a new student orientation week (or day) before classes start, that may be your best choice.
- Other options to consider include administering the CSI during placement/assessment testing, during an orientation class or freshman seminar, or in a regularly scheduled class the first few weeks of the term.
- If you are administering the online CSI, you can ask students to complete the survey at home prior to orientation, thereby enacting even earlier assessments and interventions.
- Interventions with students generally occur within two to three weeks after you administer the CSI. In some cases there is a time lapse of a month or more before the initial intervention, and you will want to acknowledge this when you begin your meeting with the student.

How do we schedule the CSI to encourage maximum student participation?

The CSI should be administered before the term begins or as early in the term as possible. Consideration of the following points can help you ensure maximum participation:

- Allow sufficient time for *all* students to complete the CSI. Suggested timeframes include:
  - CSI Form A: allow 60-90 minutes
  - CSI Form B: allow 30-45 minutes
  - CSI Form C: allow approximately 20-25 minutes for completion online
- For computer lab administration of the online CSI or for paper administration, be sure to select a time and day when most students can attend – when there are minimal schedule conflicts.
- Be sure students are notified of the date, time, and place.
- If it is not possible to administer the CSI to your entire target group all at once due to space, scheduling, or budget limitations, consider scheduling a number of sessions.
  - This allows students who were unable to attend the first session to still take the CSI.
  - For paper administration, this also enables you to purchase fewer CSI booklets since they are reusable. However, more examiners or more time from one examiner will be necessary.
- Some institutions have attempted to administer the paper/pencil version of the CSI on a take home basis or by mail. We typically do not encourage this method unless all other means of administering the CSI have been exhausted.

- If you are using the *online* CSI in addition to paper administration, complete an order form for the Online CSI as well. An e-mail from RMS-tech@noellevitz.com with your access codes to the Retention Data Center through *my*Noel-Levitz will be sent to you, allowing you to set up your online account.
- To administer the online CSI, you will need to set up an online survey administration which may include the upload of a .CSV file with student information. Please call 800-876-1117 or technical support at RMS-tech@noellevitz.com for prompt assistance in setting up your online account.
- For your own introduction, please review the Quickstart documents located at My Applications of *my*Noel-Levitz.

How do we create a suitable environment for administering the CSI to our students?

The suggestions that follow can help to ensure a suitable environment for students to complete the CSI.

- Select a room that is relatively free of distractions for administration of the CSI. For administering the paper CSI, working with smaller groups of students is preferable to a larger auditorium.
- If you are administering the online CSI, please be aware that completion rates can be low unless you have a structured method, such as students completing the CSI in a computer lab. In this setting, it's most effective to use the rolling method of administration.
- To learn the best method for your situation, please contact a RMS *Plus* program manager at 800-876-1117 or technical support at RMS-tech@noellevitz.com for assistance.

Who should administer the CSI?

For each survey administration, we recommend one examiner and two student assistants. Here are some guidelines to help you choose and prepare examiners:

- The Coordinator may choose to serve as the examiner.
- The Coordinator may choose to train a cadre of examiners when large numbers of students are completing the CSI in several locations and at several times.
- Considerable care should be taken in selecting and preparing the examiners.
- An examiner's attitude toward motivational inventories is a crucial variable. Carelessness or disinterest on the part of an examiner may lead to problems in administering the CSI, potentially undermining the process. If possible, try to recruit volunteers to play this role.
- You will need to hold an hour-long meeting to brief your examiners on the process and expectations for serving in this role.

Examiner Instructions are available for both the paper and online versions.

You will want to review the very last item in the CSI and decide whether you need to modify it to fit your circumstances. This statement is:

> *"I authorize my institution to share results from this inventory with my advisor and appropriate student service offices which will help me select courses and make other educational decisions."*

If you decide to hand out an additional student consent form, be sure examiners are given instructions for this as well. Students who respond "No" to the last item of the CSI will be noted as Restricted Reports and not available except to the campus coordinator.

- Your meeting with examiners should include the following:
  - Purpose of the CSI
  - Content of the CSI
  - Examiner Instructions
  - Role of student assistants

Purpose of the Inventory

The CSI is designed to identify the strengths and challenges of incoming students for the purpose of early intervention.

Content of the Inventory

Ask the examiners to review a copy of the CSI (paper and online) at www.noellevitz.com/RMSsamples to become familiar with the items that comprise it as well as its layout. Point out that each section in the booklet uses a different response format. Briefly discuss examples from each section.

Examiner Instructions

Distribute and discuss the examiner instructions and discuss clearly. Assure the examiners that administering the CSI is not complicated; however, the proper tone and introduction do influence how diligent the student is in completing the CSI. One of the themes in the examiner instructions that deserves the strongest possible emphasis is*: students should not be forced to complete a motivational inventory against their will.*

Every examiner accepts responsibility for respecting students' options for completing the CSI; they should never imply that a penalty of any sort will be imposed on a student who does not complete the inventory. Failure to abide by this principle, either with the CSI or any other measure of attitudes, can create serious problems.

Role of Student Assistants

Student assistants can be very helpful to examiners. They can distribute all materials and help the examiner check the answer sheets as they are turned in. It is important to check each answer sheet for omissions, stray marks, and the correct method of filling in the bubbles. *Be sure name, gender, age, designated group number, and student ID number are written in as well as bubbled in*. With the paper version of the CSI, any answer sheet with eleven or more omissions for CSI Form A, and with five or more omissions for CSI Form B, cannot be scored. A number of students may forget to complete the last page of CSI Form A, so be sure to check each answer sheet for completeness as it is turned in.

How do we process the completed CSI answer sheets?

Finally, return the answer sheets to Noel-Levitz for processing as soon as all targeted students have completed the CSI.

- Fill out your Scoring Request Form and return to Noel-Levitz. This form is essential for keeping track of whose sheets have been submitted and whose e-mail should be notified when reports are posted online.
- Return all **completed answer sheets** with your Scoring Request Form, using manila envelopes that allow for packaging without bending or tearing the answer sheets. If you have multiple packages, place them in a single box for shipping. ***Please be sure to use a service which can track your package.*** We recommend overnight or two-day air shipping whenever possible to facilitate the timeliness of the scanning, scoring, and posting of your reports online.
- Shipping Address:
  Attention: CSI Processing
  Noel-Levitz, Inc.
  2350 Oakland Boulevard
  Coralville, IA 52241-9702

The CSI Reports

How are the CSI reports generated?

After the completed answer sheets are received by Noel-Levitz for processing, they are scanned and scored. Five standard reports are generated and made available to the CSI coordinator online at the Retention Data Center found at *my*Noel-Levitz:

1. The Coordinator Reports
2. The Advisor/Counselor Reports
3. The CSI Student Reports
4. The CSI Summary and Planning Report
5. The Integrated Summary Observations with Receptivity Report

The CSI reports can be sorted alphabetically by students' last names, or sorted by group numbers and alphabetically within those numbers if four-digit group numbers were designated on the answer sheets.

The Integrated Summary Observations and Receptivity Report and the filtering options are available online at no extra charge to assist you in prioritizing or focusing your outreach to students.

How do we access our CSI Reports?

The CSI Coordinator Reports, the Advisor/Counselor Reports, the CSI Student Reports, the CSI Summary and Planning Report, and the Integrated Summary Observations with Receptivity Report are available online to campus coordinators. A CSI program manager or technical support can also assist you in setting up permission rights through the Retention Data Center for advisors, mentors, first-year experience course instructors, etc. to access selected types of reports for entire batches or subgroups of students whom they serve.

- Once the answer sheets are scanned and scored by Noel-Levitz, an online link to your reports, along with your user name and password to the Retention Data Center, will be e-mailed to the person identified on the Scoring Request Form.
  - Within a few business days after your answer sheets arrive to Noel-Levitz, an e-mail message from RMS-tech@noellevitz.com will notify you that your results are ready.
  - Be sure to enter this address in your e-mail contacts so that our address is not perceived as spam.
- The reports are generated in a .PDF format which you can access, save, and print.
- Instructions for accessing the CSI reports can be seen in Report Retrieval within the Quickstart documents of the Retention Data Center.
- You may print as many copies of reports from the online link as you choose.
- Contact the retention solutions team at Noel-Levitz to access and discuss your reports.

How do we share the CSI Reports with our advisors?

The term "CSI advisor" is used throughout this guide and denotes any faculty member, professional advisor, counselor, or mentor who may be responsible for discussing the results of the CSI with students. You are responsible for providing them with access to the appropriate CSI Reports.

- Decide which type of report(s) the advisor should be able to access and for which students.
- Grant the advisor permission rights for viewing these reports online or print them for the advisor.
- If you allow the advisor access to the Coordinator's Report, the Summary and Planning Report, or the Integrated Summary Observation with Receptivity Report (with the more sensitive Summary Observation scores), then provide additional instructions concerning these reports.
- *Special Note*: Ensure that the Restricted Reports, i.e. those from students who have responded “No” to item 194 on CSI - Form A, item 100 on CSI - Form B, or item 74 on CSI - Form C, are not distributed.

How do we share the CSI Reports with our students?

We recommend that advisors share the CSI Student Report in a one-on-one meeting with students. Additionally, instructors in freshman seminar courses often ask students to write a reflective paper and establish personal goals and action steps based on their CSI results.

If you choose, the option exists within survey administration of the Retention Data Center for students to have immediate viewing of their student report upon completion of the online CSI.

Regardless of the forum for sharing the report, it is important to be sensitive when discussing results with students.

CSI Interventions

How do advisors interface with students?

The main purpose of meeting with each student to discuss the Student Report is to establish a connection between the student and the services he or she needs. Therefore, each student should receive a full, personal explanation of his or her results.

The following strategies are provided to guide your decisions on how to facilitate the advisor's interface with students:

- The Advisor/Counselor Reports are provided to the appropriate advisors to facilitate one-on-one meetings with students about their Student Report. The most effective means of using the CSI is to schedule individual interviews of approximately 30 minutes' duration with each student.
  - At some smaller institutions, advisors individually approach each student to schedule an initial interview and others use the sign-up method.
  - The important point is that individual conferences provide the most effective means of using the CSI and addressing students' needs.
  - To be of greatest value to students, these individual conferences should be completed early in the term.
- When individual interviews with students are not possible, some institutions distribute the reports through small groups (10-15 students) and then explain the meaning of the scores, allowing ample time for questions during and after the meeting. If this is the option you choose, it would be most effective to schedule one and a half to two hours for this meeting and emphasize *referral resources*. An invitation for one-on-one meetings could be offered as well.
- Coordinators at some institutions have organized one hour group sessions to familiarize students with the CSI before conducting student-advisor conferences. This approach is quite beneficial, as it allows an advisor to focus on the student's *results* during individual sessions rather than on the meaning of the scales.
- Another highly effective variation used on many campuses is to deliver the student reports through a student success course if one is available.
  - The instructors should meet with students individually or at least provide opportunities for such contact.
  - The individuals conducting such groups or courses should receive the same training in the use of the CSI as they would under the advisor plan.
- Whatever strategies are adopted for interfacing with students, *results must be interpreted in context* of all information available. Complete details on how to conduct conferences with students are contained in the CSI Advisor's Guide.

Who is responsible for managing student referrals?

Referrals allow you to extend the value of the CSI by directing students to those services that provide them with the skills, opportunities, and support they need to become independent learners. Many campuses are able to increase the number of referrals by matching students with the services they indicated as relevant or desirable on the CSI.

Student referrals to appropriate educational resources are managed through partnerships between campus service professionals, advisors, and you, the Coordinator. Your role will include:

- Providing campus-specific supplemental text to insert under the primary categories of the student reports' narrative. These categories include: Academic Support, General Coping, Social Motivation (for Form A), Miscellaneous, and Receptivity to Support Services.
  - It's especially important to list these service offices under the category of Receptivity to Support Services, to display in the CSI student report narrative text.
  - Sample text is noted below. Campuses list service offices, contact names, inspirational service messages, and encouraging words about the importance of visiting student success centers, for instance.

Category	Narrative	Campus-specific Language
Academic Motivation	Information on resources and services in this area is available to you in the Academic Resource Center located in XXX, room xxx. Contact xxx at xxx-xxx-xxxx or XXX@xxx.edu	
General Coping	Information on resource and services in this area is available to you in the Office of Student Affairs located in XXX, room xxx. Contact XXX at xxx-xxx-xxxx or XXX@xxx.edu.	
Miscellaneous	We are here to help you. Visit us any time at the Student Center.	
Receptivity to Support Services	Information on resource and services in this area is available to you in the Academic Resource Center (xxx-xxx-xxxx), Counseling Center (xxx-xxx-xxxx), Office of Student Affairs (xxx-xxx-xxxx), and the Career Center (xxx-xxx-xxxx)	

- Taking the lead in updating your resource and referral guides and customized report text annually and sharing it with advisors.
- Meeting with the referral offices to develop a strategy for using the outreach lists from the Summary and Planning Report, Summary Observations with Receptivity Report, and reports you establish through the use of the powerful filtering options in the Retention Data Center.

How can the CSI Summary and Planning Report help us get organized for referrals?

The CSI Summary and Planning Report can help facilitate the management of referrals. An in-depth discussion of this valuable aggregate report is available in Understanding and Using the CSI Summary and Planning Report. This aggregate report contains two sections of information that comprise a powerful method of addressing students' needs.

1. A motivational profile of your incoming class

The motivational profile presents a simple, straightforward analysis of your students' group tendencies on the CSI. You receive the means for your group on all major scales and demographic or background items. For example, the report compares your students' motivational patterns with the national norm and also provides such background information as the level of parental education.

The information in this section is useful in identifying any special strengths or challenges of your students as a group. You can identify the strengths and challenges of your incoming class. For instance, your class may have a high desire to finish college, but low study habits. This would help as you plan how to prioritize your services and position your student success initiatives. Or if your aggregate report indicated some lower coping scores, you might wish to incorporate a college adjustment component into your orientation program.

Also included in this section is a list of the possible specific recommendations for students (Forms A and B of the CSI have 25 and Form C has 14 recommendation statements). These recommendations are weighted by how often they appear in individual student reports. This list is helpful in identifying the most needed services and programs for students inventoried with the CSI.

2. Outreach lists of students with specific needs

The second section of the Summary and Planning Report consists of detailed lists of students with particular needs. These outreach lists are fully described in the CSI Resource Guide. As you review them, keep in mind that you will not need to implement all of the ideas suggested. Focus on the ideas that are most practical and effective for your institution.

One potential use of the lists is for selecting students to receive a personal invitation from special services. The purpose of the invitation is merely to inform certain students of an activity that appears to have special value for them. Such an invitation will often attract students to an activity that they may not otherwise feel sufficiently motivated to attend. These invitations are not meant to imply that other students should be excluded.

Additionally, the names and data of students who responded "No" to the last item of the CSI are not included in these outreach lists; however, their data is included in the preceding statistical summary.

When clients were asked to indicate how they used the Summary and Planning Report(s) and accompanying outreach lists, the following strategies were mentioned most frequently:

- 28 percent use the *list of potentially at-risk and receptive students* to prioritize our outreach activities.
- 23 percent share *lists of students interested in campus services* with appropriate offices for special outreach.
- 18 percent share *aggregate motivational assessment and demographic data* with our retention committee on a regular basis.

- 16 percent structure *campus programming* to address the top recommendations for action (such as "get help with study habits" or "discuss the qualifications for occupation") with each incoming cohort.
- Nine percent look at subgroups of our aggregate data by *specific classes and majors* to focus our interventions.

The Summary and Planning Report outreach lists include explanations that provide helpful perspectives indicating motivational patterns in the CSI data. You can use these patterns to inform how you apply the filters in the Retention Data Center, thus supporting your interventions.

How can we use the Integrated Summary Observations with Receptivity Report to inform referrals and interventions?

The summary scales provide a balanced overview of potential risks for first-year students. The overall risk index considers the student's background and historical patterns of achievement. Desire to transfer indicates the students' initial intentions to remain at your institution to complete a degree or program of study.

Together, these scales form a unique picture of the students' perceived needs and their receptivity to your help. Unlike the *Summary and Planning Report*, this report allows you to identify patterns of need and receptivity for your most at-risk students in table format.

Color highlights are applied to student scores of 80 or above on the summary scales and 65 and above on the individual receptivity scales to reveal the patterns. Scores of 80 and higher on desire to transfer for these students are also highlighted.

If you choose to print this table, only the scores within the parameter defined above will appear on the printed copy, even though you are able to see the lower scores in the online view of the table.

You may apply your own filter to the data by defining the value (scale) and range of the scores in the drop down menu. The Excel table may be downloaded for additional analyses, as well. For the thought behind this report, please see the white paper, *The Integrated Nature of the Retention Management System*, at www.noellevitz.com/RMSclient for more detail.

How do we partner with colleagues?

There are a number of options to consider in working with your colleagues, including professional advisors, student success coaches, counselors, residence hall directors, and others in student services. Nevertheless, you should take steps to ensure that everyone is adequately informed about the CSI. Providing the CSI Advisor's Guide and Resource Guide will present them with information for interpreting and effectively using the CSI Advisor/Counselor Reports. An array of resources are available for your reference at the client communities site.

You may wish to encourage all involved colleagues to leave some open blocks of time to confer with students who have been identified as needing help with specific areas. You can also encourage them to plan special group activities for students with certain types of needs.

You may want to schedule focus groups with students who have lower scores that you want to understand in order to facilitate appropriate referrals.

Your colleagues in all support areas will need to be prepared to receive referrals based on the CSI results, especially those based on high receptivity scores.

Some examples of special workshops that have been developed for groups of students with similar needs indicated by the CSI reports include:

- Managing Test Anxiety
- Enhancing Exam Skills
- Reading for Comprehension
- Developing Effective Study Habits
- Fostering Self-Esteem
- Charting Your Career path
- Strategies for Problem Solving
- Managing Your Money
- Managing Your Time
- Overcoming Addictions
- What You Need to Know About Financial Aid
- Relationship Building in College
- Cultivating Communication Skills
- Developing Your Leadership Potential
- Stress Management Techniques

The Advisors

Who are the advisors?

The term "advisor" is used throughout the Retention Management System *Plus* guides and denotes any faculty member, professional advisor, counselor, mentor, or success coach who may be responsible for discussing the results of any of the surveys with students.

Some of the most desirable qualifications of the advisors are:

- Strong concern for students' well-being
- Genuine interest in student development
- Generosity in their approach and guidance
- Willingness to work with the relevant reports
- Credibility as a student advocate
- Ability to establish rapport with students

Generally speaking, advisors are characterized as those who are willing and interested in using the survey and analytical to work effectively with students. It is counterproductive to work with advisors who do not wish to use the tool.

Do CSI advisors need special instruction?

You are the point person for selecting and guiding the advisors through the content presented in the relevant Advisor and Resource Guides. Once your advisors are selected, you need to arrange for special instruction on how to effectively use the instruments and results. This is most often accomplished by planning a workshop or a set of workshops to facilitate the instruction. (See resources available to you at: www.noellevitz.com/RMSclient).

The purpose of the workshop is to prepare advisors to interpret and utilize the Advisor/Counselor Reports and the Student Reports. By the end of the workshop, the goal is to have the advisors feel reasonably comfortable with: the instrument, patterns of motivation as indicated in the reports that are generated, and their use of this program in student development initiatives.

You will want to consider the following questions as you prepare for your advisor workshop:

- What is the best time to schedule the workshop?
- How much time is recommended for the workshop?
- Who conducts the workshop?
- What preparations do advisors need to make before the workshop?
- What information should be covered?
- Are follow-up sessions worthwhile?
- What’s included in a typical workshop agenda?

What is the best time to schedule the workshop?

We recommend that the workshop be scheduled before classes begin in the fall to eliminate the challenges of scheduling a half-day session with advisors after classes begin. If you are unable to schedule the workshop in one session, we find that two separate sessions can work equally well.

How much time is recommended for the workshop?

If possible, the workshop should be scheduled for four hours on one day or for two hours on two days. The absolute minimum amount of time required to adequately cover the CSI content and allow time for hands-on experience with the reports is two hours. Three hours is recommended for the CSI Coordinator who has limited experience conducting workshops.

Who conducts the workshop?

As the Coordinator, you may conduct the workshop(s) yourself or you may choose to contract with a Noel-Levitz associate consultant to come to your campus. If you contract with Noel-Levitz, this day-long workshop includes an investment of $2,700 plus expenses. To learn more about this option, contact a RMS *Plus* program manager at 800-876-1117.

What preparations do advisors need to make before the workshop?

Advisors are encouraged to read the CSI Advisor's Guide and Resource Guide prior to the workshop. You can access the CSI Advisor's Guide from the *my*Noel-Levitz RMS *Plus* client resource site and distribute the PDF to each participant. It is helpful for the advisors to review the items on the College Student Inventory as well. Toward this end, the CSI can be viewed at www.noellevitz.com/RMSsamples.

What information should be covered?

The CSI Advisor's Guide is the primary source of information for the workshop, with an emphasis on the meaning of the scales in the CSI, effective ways of discussing reports, role-plays of advisor-student conferences, and referral management.

To support your workshops with colleagues about the CSI, an Advisor Workshop template, a Power point presentation, and a video of an advisor and student conference are all available for your use under the Guides section of the client community site. Hence, there is no need to reinvent these materials with your tight schedules.

Are follow-up sessions worthwhile?

Follow-up sessions after mid-term are helpful for both coordinator and advisor. It is an opportunity for the coordinator to encourage advisors to track the progress of their advisees, especially with regard to referrals. As part of this discussion, you may want to consider the Mid-Year Student Assessment as an accompaniment to your interventions.

Through on-going discussions, advisors are able to share their experiences with the program and provide feedback that can help to inform the workshop agenda for the next term/year, thereby helping you to attain the most benefit from this initiative.

What's included in a typical workshop agenda?

The typical agenda includes examining the components of the CSI, interpreting sample CSI reports, role playing the advisor-student conference, and updating the resource and referral guide. The CSI Advisor Workshop provides a sample agenda to guide the development of your own agenda. The information for the workshop agenda comes from the CSI Advisor Guides.

Assessing CSI Outcomes

Why is it important to assess CSI outcomes?

The pressure is increasing for institutions to retain and graduate more of their students. There must be continual follow-up of referrals, accurate record keeping, and accountability to ensure that students' needs are addressed in the most constructive manner.

Properly implemented, the CSI can help to facilitate those efforts. Unfortunately, the implementation often stops short of assessing the qualitative and quantitative outcomes of the CSI interventions. To ensure maximum benefits to both students and the institution, it is important to establish desired outcomes of the CSI interventions early on and to develop a process for assessing these outcomes.

Sometimes the scores on the Summary and Planning Report can suggest the need for additional resources in key service areas. For example, if a campus has low scores on math confidence and high scores on receptivity to academic assistance, this information can be used to support budget requests for additional resources to accommodate more student interventions.

Several creative coordinators have pointed out that they were able to subsidize first-year advising, purchase equipment, and add counseling, advising, or academic support staff by demonstrating to their administrators that the increased retention rate had saved the institution thousands of dollars in one year alone, money which could be spent, at least in part, on necessary services and staff to address students' needs. The Retention Revenue Estimator at the Noel-Levitz website can help you determine potential savings at your institution.

What are the desired outcomes of the CSI?

Identify the outcomes you intend to achieve before the CSI is implemented. It is beneficial to seek input from those who will be involved in implementing the program and collecting data.

When asked, clients identified their primary goals in using the CSI as follows:

- 67 percent want to *foster student success through early alert and interventions*.
- 55 percent want to *increase retention and graduation rates*.
- 22 percent want to *inform their student-centered advising practices*.
- 18 percent want to *increase student satisfaction with advising and campus services*.
- 14 percent want to *inform their assessment initiatives*.

Other outcomes mentioned in the survey included: to have *a starting point for conversation* and follow-up, to assist in *a more meaningful conversation,* to help students make *a personal connection with a faculty or staff member,* and to begin *dialogue with students about their motivation in college and the goals they plan on setting*.

How do we measure our desired outcomes of the CSI?

After you and your colleagues identify the desired outcomes you hope to achieve with the CSI, you must then decide how you will measure those outcomes. You need to identify how the outcomes data will be collected.

When CSI adopters were asked to indicate *the measures* they used to assess their effectiveness in reaching the goals they had established, their responses were as follows:

- Retention rates
- Graduation rates
- Student satisfaction with advising and other academic services
- Grade point averages
- Qualitative feedback from students
- Qualitative feedback from advisors or mentors
- Number of students on probation
- Number of referrals to campus services, such as academic support, career counseling, personal counseling, etc.
- Qualitative feedback from referral offices
- Improvements in institutional revenue from higher retention and graduation rates.

Professional and Ethical Considerations

What do we need to know?

This section outlines the major ethical considerations involved in using the CSI, as compiled by its author.

Confidentiality

The American Psychological Association's Ethical Principles state that confidentiality of information obtained from students is to be respected at all times. Specifically, principle 5(a) states that information obtained and evaluative data concerning students is discussed only for professional purposes and only with persons clearly concerned with the case. This means that students' profiles are not released to any third party unless the student has given a written release or the third party has a legitimate need for access to the profile. Whereas the term confidentiality was once thought of solely as a matter of professional ethics, it is now true that case law, statutes, and licensing regulations in many states have given this standard of conduct legal status as well. For example, professionals are legally liable for breach of confidentiality.

Therefore, all CSI reports should be maintained as confidential in compliance with the Family Educational Rights and Privacy Act. In practical terms, this means that they should be handled with discretion. They should not be placed in unlocked filing cabinets where open access is available. As the online system indicates, these reports are to be handled in accordance with FERPA guidelines.

Protection of Privacy

An institution has a right to assess a student's qualifications for admission, placement or graduation, based on reasonable indications of academic competence. But a person's attitudes are a more subjective, private matter. Forcing a student to take the CSI would be counterproductive at best and harmful at worst, especially if the student feels that his/her right to privacy has been compromised. Moreover, since questionnaires are susceptible to faking in a favorable direction, pressuring a student to participate could invalidate the CSI's results. For these reasons, the CSI informs students that participation in any RMS *Plus* activity, including completion of the CSI, is voluntary.

Protection of a student's privacy involves two key concepts: relevance and informed consent. The information that the student is asked to reveal must be relevant to the stated purposes of testing. For this reason, advisors must ensure that the results are correctly interpreted. The concept of informed consent implies that test takers are made aware, in language they can understand, of the reasons for taking the CSI, what the CSI measures, how the results will be used, and what testing information will be released and to whom (Standard 16.1; Ethical Principle 8(a)).

Students are provided this information on page one of the CSI. However, further elaboration by the examiner is usually necessary. In addition, the last item of the CSI authorizes the results to be sent to the student's advisor. If a student does not authorize release to the advisor, "Restricted to Program Coordinator per Student's Request" will be printed at the top center of his/her CSI Advisor/Counselor Report. Special provisions will be made by your RMS Coordinator to handle these reports.

The Right to Be Informed of the CSI Results

Although informing students of their results from having completed the College Student Inventory is the very foundation of the Retention Management System *Plus*, a brief mention of the ethics involved is in order.

Test takers have a right to be informed, in terms that they can understand, of the nature of the findings with respect to a test that they took. Also included here is the right to know what recommendations are being made as a consequence of the test data. Conversely, if for any reason, test results or findings (or recommendations made on the basis of test data) are being voided for any reason (such as irregularities found to have been in evidence), test takers have a right to know that.

The possibility of untoward consequences exists as a result of providing individuals with feedback about themselves – their ability, their lack of ability, their personality, their values. The communication of results of a psychological test is a most important part of the test process. With sensitivity to the situation, you should inform the test taker of the purpose of the test, the meaning of the score relative to other test takers, and the possible limitations and margins of error of the test. And regardless of whether such reporting is done in person or in writing, a qualified psychologist should ideally be available to answer any further questions test takers have about the test scores. Further, counseling should ideally be available for test takers who become distraught at learning how they scored on a particular test.

Competence

The question of who is qualified to use the CSI's reports was considered in depth. The guidance provided by the APA testing standards has been very helpful. The most relevant statement appears under principle 5.1 (APA, 1985), which indicates that a test manual should provide special instructions to teachers or others who lack the formal training usually expected of those who interpret a test. It also recommends that interpretive aids be provided for tests that are to be interpreted by the test taker.

The purpose of the CSI Advisor's Guide is to provide the information that an educator should have in order to use the CSI properly. In addition, interpretive aids are provided to the students in the form of a narrative report that accompanies each profile.

The author of the CSI recommends that the following guidelines be used as recommended policy for advisors who use the intervention program.

Advisors can use the CSI to; (a) help students understand their student report at a common-sense level of interpretation, (b) discuss possible forms of assistance available to a student in light of the needs and desires indicated in the CSI, and (c) offer a student tactful encouragement to seek forms of assistance that the advisor believes are appropriate but for which the student may have little enthusiasm.

The role of the advisor, therefore, is merely an extension of the kind of role that advisors have traditionally played. Just as one might examine a student's placement scores in math and recommend a beginning or advanced course, an advisor can examine a student's score on study skills and recommend a workshop.

Advisors must (a) never pressure a student into discussing matters that the student does not wish to discuss and (b) avoid any attempt to provide psychological counseling to a student based on the CSI. An Advisor who is a properly licensed or certified psychological counselor may, of course, be an exception to this restriction. But they should be very sensitive to the special problems (e.g. conflict of interest) created by the academic context in which they work and the ethical and professional considerations related to the practice of psychological counseling (as stated, for example, in principle 1B of Ethical Principles of Psychologists [APA, 1981]). When a student confers with an academic advisor, he/she does not expect to receive counseling. Therefore, counseling should not be undertaken during advisement sessions but rather scheduled for separate sessions that the student understands and agrees will be devoted to counseling.

The restriction against engaging in psychological counseling (restriction "b" above) is based on the premise that such counseling is a very sensitive undertaking that requires special training. Although quite well-meaning, we often engage our own biases when we deal with the problems of others. Professional training is designed to prepare one to recognize such influences and take steps to minimize them. In addition, training provides the technical concepts needed to predict the effects of different approaches to counseling. Your role as an advisor is simply to provide information and refer the student to appropriate resources. In many ways you are a liaison between the student and the college bureaucracy; your objective is to link the student with the resources he/she may need to succeed.

The restriction not to pressure a student follows from the general ethical considerations discussed earlier. Also, pressuring anyone to discuss private matters is evoking responses that are counterproductive.

Proper Use of Tests

Any test is simply a measure of a sample of behavior. It is an estimate subject to confirmation by data obtained from other sources. Thus no test should be used in isolation. Test scores must be interpreted in light of other information available, such as student records and interviews with the student. *As previously stated, the CSI is best viewed as a hypothesis to be tested and confirmed in the student-advisor conferences. It is thus a conduit for meaningful discussion early in the term.* Consider it a means to an end, with that end being the identification and addressing of students' strengths and needs, in order to help them connect with services that will elevate their success as they strive to attain their educational and career goals.

References

Standards for Educational and Psychological Testing. American Psychological Association: Washington, D.C., 1999. http:www.apa.org/science/standards.html

Ethical Principles of Psychologists and Code of Conduct. American Psychological Association: Washington, D.C., 2002. http://www2.apa.org/ethics/code2002.doc

Frequently-asked questions about the CSI

1. Should students be familiar with our institution before they complete the CSI?

Some Coordinators have expressed concern that students need to have more exposure to the campus before they complete the CSI. However, remember that the CSI is designed to measure attitudes and motivational patterns that students bring with them. Since it reflects prior educational experiences, it is *not* necessary for students to be familiar with your institution in order for the results to be valid. In fact, to get the best results, students should not have much experience with the institution prior to completing the instrument. This instrument does not measure, and is not intended to measure, student satisfaction with the institution.

2. Should honor students participate in this program?

Having excellent academic credentials doesn't necessarily equate to persistence and academic success, since "good students" often arrive without clear educational, career, and life plans. For example, the honor student may lack adequate coping or study skills for dealing with a highly competitive academic landscape. This may become apparent if you filter under the category of high Educational Stress, perhaps seeing some reports of your students with higher self-reported GPA's. So yes, "good students" can benefit from the CSI, as they need direction, too.

3. Is the CSI appropriate for new students who enroll in the spring term?

January administration of the CSI is an often overlooked opportunity for using the CSI, since new students who enter in the spring term can also benefit from the program. Too many times these students fall through the cracks.

Remind yourself about six to eight weeks before the spring term to begin preparations for ordering the materials, contacting their advisors, and setting up a time for administering the CSI and following up with students.

4. How important is it to gain faculty support for the CSI?

In a survey of Coordinators, the advice most frequently given to those beginning a retention effort was to gain faculty support. Faculty are often in an ideal position to recognize the students' academic needs.

5. How can we encourage collaborations between academic and student affairs?

There are many strong models that involve the talents of colleagues from either academic or student affairs. Regardless of which division leads the initiative, the focus must be on proactively reaching out to students through programmatic and individualized interventions.

If you began your CSI initiative in the student affairs division, you may now be planning to expand it to academic affairs. According to Dr. Gary Biller, the following steps may be helpful:

- Compile data about your institution's retention rate and how it compares to similar institutions in your area.
- Translate attrition numbers into financial loss.
- Gather data and information from your retention task force to present to the faculty.
- If no retention task force exists, create a student success task force for the CSI that includes at least two key faculty members.
- Schedule meetings with key faculty (i.e., advisors, departmental heads, instructors of first-year courses, advising coordinators, committee leaders, mentors, etc.).
- In your meetings with key faculty (either one-on-one or in small groups), solicit their thoughts about, and advice on, retention before explaining the CSI to them. Ask if they think the CSI sounds useful to them.
- Ask one or two key faculty to present your plans for the CSI to the faculty as a whole; alternatively, have them schedule you to deliver a presentation, either to groups of faculty (by department or college) or to the faculty as a whole.
- When formally presenting the CSI to faculty, keep it short and to the point and present the retention data so that the need for action is clear.
- Emphasize the important role faculty have in student satisfaction and retention:
  - Point out the power they have to affect the budget by increasing retention.
  - Demonstrate to them the benefits of increased student satisfaction and persistence.
- Clarify your role as CSI Coordinator:
  - Explain how the CSI results will be used.
  - Promise feedback on the progress of the CSI each term.
  - Solicit input throughout the year.

6. How can we gain and maintain administrative support?

Communication is key to gaining and maintaining administrative support. This support can strengthen your early intervention initiatives by linking the CSI program to the campus-wide mission of student success,

A retention task force on your campus is a critical component in gaining support from administrators and colleagues. Once this task force has endorsed the CSI and budgetary approval has been gained, dissemination of all CSI-related information should come through the task force.

It is advisable to send updates and reports from the task force to appropriate colleagues and administrators at regular intervals. The campus should be apprised routinely of what's happening in the area of retention. Some strategies you might consider include the following:

- Articles in the campus newspaper and faculty/staff newsletter
- Regular reports sent to all administrators and public relations office

- Collaborative campuswide planning sessions to identify current strengths and concerns, to share successful early intervention practices, and to define desired outcomes and directions for retention in general
- Sharing best practices gleaned from other campuses through listserv and networking in a variety of forums.

7. What are some common communication challenges to avoid?

Communication and coordination of efforts is vital if administration of the CSI is to proceed smoothly and if referrals are to be made effectively. *All appropriate institution personnel should be notified of the date(s) for administering the CSI, the purpose of the administration, and how the results will be used.*

8. Can the CSI support a strengths-based advising program?

The CSI can be adapted for any type of advising program. The presentation of the motivation scales on the Student and Advisor/Counselor Reports provide an opportunity for the advisor to focus primarily on the student's strengths if they desire to do so. A series of questions in the Resource Guide provides a structure for looking at the CSI Student and Advisor/Counselor reports through the lens of a strengths-based advisor.

9. How does the CSI promote student engagement?

Student engagement occurs when the student connects with the college community in ways that advance his or her opportunities to become fully integrated into that community. Here are some specific ways the CSI advisor promotes student engagement:

- Each of the CSI scales can be connected to at least one student service or support area. For example, the Academic Confidence scale (in CSI Form A) presents an opportunity for the advisor to connect the student to specific activities in the academic areas. The receptivity scales represent even more direct links with programs and services.
- The CSI features up to seven specific recommendations for each student on the Student Report. Again, these recommendations represent specific opportunities for the student to connect with the programs and services he/she needs, based on the inventory.
- The CSI Summary and Planning Report provides outreach lists that allow individual program and service areas to connect with students who have indicated a need or a desire for their services.
- We provide sample interview questions (Form A, Form B, and Form C) that are designed to promote student engagement with the programs, services, activities, and people who can help them become integrated into the college community.

10. How can the Summary Observations with Receptivity Report enhance our interventions?

The Summary Observations with Receptivity Report provides a visual representation of your student across the summary scales and the individual receptivity scales. This allows you to identify patterns that may inform specific interventions. For example, if you observe high receptivity to institutional help and high receptivity to financial guidance when scores on the remaining summary scares are relatively low, this suggests a review of other independent scales, like family emotional support and sense of financial security to further refine the intervention for groups or for an individual.

Because your data can be filtered on any of the summary scales, receptivity scales, and desire to transfer, this report can be extremely helpful in defining need, receptivity, and opportunities to intervene. You can locate this feature in the Retention Data Center.

11. Why should we use the new filtering options?

In the Retention Data Center, the use of filters to focus your interventions has been expanded. Using the powerful new filtering features in the Retention Data Center allows you to discern patterns in your CSI data and enact creative outreach initiatives, using the system's e-mail features.

For instance, you could readily identify and contact all of the students with a low to moderate score on desire to finish college and low to moderate score on career closure coupled with a moderate to high receptivity to career counseling for a special workshop on goal-setting.

In considering how to approach patterns in your data, review the Power point and also explanations for the outreach lists in the Summary and Planning Report for effective ideas, which can then be studied further through application of the filters.

12. Can we sort our data into different subgroups?

Five grouping fields are available in the online system. For instance, campuses may use the fields to represent current advisor, residence hall, first year experience course section, program of study, etc. Contact us for a brief instruction on this feature in the Retention Data Center.

Item	Selection	Grouping Field Name
1	☐	Advisor
2	☐	Entry Term
3	☐	Major
4	☐	Custom Grouping
5	☐	Course Section

13. Can we compare our CSI results to the National Freshman Attitudes Report?

A few precautions are in order if you consider comparing your CSI-Form B data with the National Freshman Attitudes Report. The only information that compares in type is the demographic information on page three that has the percentages of the students answering the demographic questions.

- This national report examines CSI-Form B aggregate data according to levels of "agreement," defined as responses of 5, 6, or 7 on the CSI rating scale of 1-7. The percentages reported in the National Freshman Attitudes Report is the percent of respondents who were in agreement with the question at some level.

- You will note that this type of analysis is different from that used in your Summary and Planning Report, where your data is viewed in relation to the mean, i.e. the national average according to institutional type.
- The national norm for the Summary and Planning Reports is based on a 50th percentile, whereas the data in the National Freshman Attitudes Report is based on "agreement."

Our suggestion for CSI-Form B colleagues getting at something close to the National Freshman Attitudes report is as follows:

- Download your raw data, i.e., the answers to each question.
- Recode the raw answers into "0" for responses of 1, 2, 3, or 4
- Recode raw answers into "1" for responses of 5, 6, or 7
- Then run averages on all the questions for all students and/or split them by male/female
- See how your averages compare to those in the national report

14. What are the theoretical underpinnings of the CSI?

The CSI has its roots in the author's research into academic and social motivation theories and cognitive and social psychology. It is an assessment tool that aims to create a coherent framework for understanding human motivation and identifying specific motivational variables that are most closely related to persistence and academic success in college. These variables then lend themselves to interventions that are directed at changing student behavior toward more successful outcomes.

As the basis of the Noel-Levitz Retention Management System *Plus*, the CSI has been integrated into the freshman experience by focusing on early intervention, engagement, different population needs, first generation students, freshman orientation courses, and issues of social and academic integration. As these various aspects of the freshmen experience become the focus of intervention, the CSI is able to provide valuable motivational and attitudinal information to assist college advisors in meeting the goals of their target audience.

The independent and summary scales of the CSI focus on those areas of social and academic integration that reveal students' readiness to become fully engaged on their campus. The interventions that are derived from these scales are designed as an early intervention tool to assist college advisors in helping each student attain the intellectual and personal growth that lie within his or her capacity. This is done through an assessment of students' personal and academic needs, and students' strengths and coping mechanisms. The goal is to understand the students' attitudes and motivational patterns to make interventions more successful.

Resources

To facilitate your use of the College Student Inventory, we have developed an array of resources to support the introduction and use of the tool. These resources will be valuable to you, as well as those colleagues who are working closely on this initiative. The resources are available at the coordinator site www.noellevitz.com/RMSclient.
Resources include:

The Retention Data Center

This data dashboard supports your administration of the motivational assessments and use of the results, thus supporting and informing your early interventions.

DASHBOARD

Offers a quick glance at your current survey administration.

STUDENTS

- Access your reports, including:
  - Coordinator Report
  - Advisor/ Counselor Report
  - Student Report
- Set your parameters for viewing and accessing these reports
- Structure your outreach to sub-populations
- Provide note-fields to document advisor and student conferences

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Quick Start documents to assist you with the Retention Data Center.

EXPORT DATA

Allows you to select and sort data fields to export for targeted communications. Also includes Translated Data and Raw Data files to be exported.

SUMMARY RESULTS

Provides access to:
- Summary and Planning Report(s)
- Summary Observations with Receptivity Report(s)

IMPORT DATA

Allows you to upload data (such as name, e-mail, advisor, freshman seminar course section, etc.), in preparation for your survey administration.

SURVEYS

Establish your survey administration (you select the College Student Inventory, Mid-Year Student Assessment, or Second-Year Student Assessment and respective forms). Select enhancing features such as insertion of:
- Your own narrative for primary categories of the student report
- Campus-defined items

CONFIGURATION

Allows you to add:
- Additional campus personnel
- Your campus logo in the questionnaire
- Your supplemental campus-defined items

Guides

Our guides are meant to support your use of the CSI and include:

- The ***CSI Coordinator's Guide***, which offers a complete review of the key responsibilities and information that you need to initiate and sustain the CSI on your campus. A key feature in this guide is the template for an ***CSI Advisor Workshop***, listing key topics to cover and resources that will make your workshop most effective.
- The ***CSI Advisor's Guide***, for CSI - Form A, Form B, and Form C, to convey useful suggestions to the CSI advisors such that the CSI is recognized as a key aspect of student development. The guide helps to prepare them to learn about the scales of the CSI, comfortably interpret CSI Reports, sensitively engage in discussions with students about their reports, while encouraging referrals to service offices.
- The ***Research and Technical Guide*** is a substantive overview of the psychometric properties of the College Student Inventory with a specialized focus on CSI Form A.

This guide speaks strongly to ***the research that informs this assessment*** and provides insights into the motivational research by the author of the instrument. Additional papers related to CSI Form B and CSI Form C provide supplemental information on the psychometric properties of these assessments.

- The online ***Quickstart*** documents and Camtasias offer steps for using the **Retention Data Center**, i.e., the technology platform for the Retention Management System *Plus*.

The CSI Advisor Workshop

This template provides a sample agenda for the CSI Coordinator to use when preparing for the Advisor Workshop. It highlights the recommended content for providing an overview of the College Student Inventory, as well as suggested activities for engaging advisors in hands-on experience with the College Student Inventory and the Advisor-Student Conference. A Powerpoint presentation is also available for your use at the client communities site.

Retention Success E-Journal

Early alert and intervention programs vary considerably from campus to campus, depending on the culture and infrastructure. Successful programs and their guiding principles are described in the *Retention Success* E-Journal articles, published twice a year.

Linking Early Intervention and Retention

The purpose of this annotated bibliography is to review the literature that 1) analyzes the College Student Inventory or 2) provides information on early intervention and student retention. Prepared by Dr. Melissa D. Ousley, University of Arizona, this is a valuable resource for those who have a retention management plan or are in the process of designing one.

Annual National Freshman Attitudes Report

Explore the attitudes that today's first-year students brought to college when they arrived for the fall term. This annual report is based on survey responses from more than 90,000 entering students nationwide.

CSI Research

This resource section includes a collection of studies and resources related to early interventions that serve to support your research with the CSI. More specific to the CSI is a discussion of the norms, developed by Noel-Levitz statistician.

If you are interested in learning more about the psychometric properties of the CSI, you can study the *CSI Research and Technical Guide*, the *CSI Form B Validity Study*, and the *CSI Form C Technical paper*, also posted at this link.

A New Way to Measure Student Success

This paper introduces a new paradigm for managing student retention, the retention "funnel," and describes how to use it to measure and enhance students' persistence and progress as they proceed to accomplish their educational goals. Guided by a retention "funnel," colleges and universities can stay in closer contact with their students' experiences from the point of admission all the way through graduation.

Retention Revenue Estimator

This valuable resource allows you to quickly estimate the revenue you can gain by increasing retention. With our simple auto-calculating worksheets, all you do is fill in a few key numbers and the worksheet does the rest. The estimator is available in three versions: two-year institutions, four-year institutions, and proprietary institutions.

The Integrated Nature of the Retention Management System

The Integrated Nature of the Retention Management System resonates within and across the entire CSI structure. This paper examines the influence of the integration on all aspects of the CSI, including the development of the survey, the scales, the reports, and the resulting interventions. The visual representation of the data provides significant insights into patterns of risk by need and receptivity.

Bibliography of Recent Research and Practice on Student Retention

Updated annually, this bibliography is a valuable resource for professionals who want to stay abreast of the latest student retention research studies, publications, and reports. In addition to focusing on retention in general, the entries are delineated by first-year students, government research, institutional research, international research, special populations, adult and distance learning, and two-year institutions.

Service

Sharing a deep educational purpose with you, we are here to support your initiatives for student success and retention. The RMS *Plus* suite of services, including the College Student Inventory, Mid-Year Student Assessment, Second-Year Student Assessment, Retention Data Center, and consulting, are all designed to support and inform your focused and early student interventions. You can reach us at 800-876-1117 or contactus@noellevitz.com.