Developing a Success Coaching Center
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1) Executive Overview ................................................................. 4
   Definition of Terms ......................................................... 4
   Key Observations .......................................................... 4
2) Qualifications and Responsibilities ........................................... 6
   Education and Training .................................................. 6
   Staffing, Responsibilities, and Collaborations ........................ 7
3) Student Engagement ............................................................ 9
   Student Interactions ....................................................... 9
   Student Information ...................................................... 10
4) Assessment and Outcomes ..................................................... 11
   Measuring Impacts ......................................................... 11
   Coaching Impacts .......................................................... 12
4) Research Methodology ........................................................ 14
   Project Challenge .......................................................... 14
   Project Sources ............................................................ 14
   Research Parameters ..................................................... 15
Appendix: Profiled Institution Coaching Centers ............................ 16
1) Executive Overview

Definition of Terms

**Coaches** create individualized development plans and milestones for students to address academic and non-academic concerns. Coaches develop these plans for student-specific requests, which differ from the predetermined strategies advisors offer to address student concerns.

- **Success coaches** provide general plans for academic and non-academic improvement. These plans may include time management strategies, personal skill development, self-confidence measurements, and anxiety reduction techniques.

- **Academic-success hybrid coaches** provide similar general development plans as success coaches but incorporate additional academic support elements, such as effective studying practices and test preparation exercises.

- **Life coaches** offer semester-long group coaching sessions for no more than 10 undergraduate students. These sessions ask students to identify a singular goal to focus on the entire semester. Goals range from student success targets (e.g., improved academic performance) to stronger interpersonal and individual development goals (e.g., better financial management, learning to play the guitar).

Key Observations

Coaches possess at least a bachelor's degree, some counseling or coaching experience, and a desire to support undergraduate students. For coaches with less education and work experience, directors prioritize candidates' personality traits and select coaches who display empathy and a willingness to work with students individually. Directors also select candidates with counseling experience or enrollment in counseling programs, as many students discuss personal struggles with coaches and require clinical support.

Undergraduate students seek coaching for time management improvement, self-confidence encouragement, and general academic support. Success coaches offer general development strategies, such as weekly planning practices and personal skill exercises, while academic-success hybrid coaches integrate studying strategies and test preparation drills into development plans. Life coaches provide goal-setting and milestone development skills and encourage students to pursue a singular goal throughout coaching sessions.

Most center directors train coaches internally with overviews of center goals, common situational strategies, and presentations from other campus support units. Through these trainings, coaches develop basic counseling knowledge, problem identification skills, and goal-setting formulas that apply to nearly any student situation. Coaches also learn about other support units and establish personal connections with counselors and tutors to whom coaches can recommend students with additional needs. Only Institution B contracts a third-party vendor to train success coaches; no profiled institutions outsource success coaching entirely.
Coaches market services to at-risk, first generation, out-of-state, and high-financial aid recipient students; institutions do not require students meet with success coaches but do require academic advising for students with below a 2.0 GPA. Center directors rely on academic advisor, faculty, and residential advisor referrals to recruit success coaching participants. These students may be at-risk academically but include students who want to balance academic and non-academic work better, develop leadership skills, or learn a new skill.

Although students provide basic academic and personal information to coaches, coaches possess limited access to formal records and almost no access to financial and judicial information. Center directors request permission from individual academic departments and student support units to review information that impacts individual students' development plans. Directors may receive access to academic transcripts and institutional aid packages but must submit formal requests for federal and household contributions and student judicial records. Coaches complete FERPA training during new employee orientation but do not complete background checks or possess specific certifications to review student information.

Students who receive coaching graduate with higher GPAs and at higher rates than students who do not receive coaching. These objective metrics demonstrate success and academic-success hybrid coaching impacts while subjective metrics, (e.g., personal well-being, ability to accomplish goals) illustrate life coaching effects. Coaching center data analysts collect these metrics through surveys before and after each session as well as through informal feedback to coaching staff.
## 2) Qualifications and Responsibilities

### Education and Training

**Hire Coaches with Counseling Backgrounds, Relatable Personalities**

Coaches must be familiar with basic problem identification and goal-setting strategies, possess some counseling or higher education experience, and demonstrate empathetic and optimistic behavioral traits. Directors prioritize candidates who are similar in age to undergraduates with knowledge of the Family Education Rights and Privacy Act (FERPA).

### Coaching Models by Education Background

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bachelor's Degree</strong></td>
<td>Success coaches at <strong>Institution B</strong> possess at least a bachelor's degree and some higher education or coaching experience. Center directors prioritize candidates' personality traits over academic backgrounds as coaches create general development plans without academic-specific components. Contacts report post-baccalaureate coaches and current master's students are closer in age to undergraduate students and are more relatable than older coaches.</td>
</tr>
<tr>
<td><strong>Master's Degree with Previous Work Experience</strong></td>
<td>Coaches at <strong>Institution C</strong> and <strong>Institution E</strong> possess master's degrees in social work, higher education counseling, and sports psychology with several years of counseling experience. These coaches perform success and academic-success hybrid coaching, which requires a balance between counseling experience and coaching knowledge.</td>
</tr>
<tr>
<td><strong>Current Doctoral Student-Assistants</strong></td>
<td>Coaches at <strong>Institution A</strong> are current counseling doctorate students with several years of work experience. These coaches conduct academic-success hybrid coaching but do not provide discipline or course-specific support. Center directors only select counseling-focused coaches as students with academic concerns often discuss personal distresses, such as anxiety or depression, and require clinical support as well.</td>
</tr>
<tr>
<td><strong>PhD or Doctorate with Counseling Experience</strong></td>
<td>The life coach at <strong>Institution D</strong> maintains a PhD in Counseling Psychology and operates through the counseling center. The center sponsors several life coaching sessions each semester in which the life coach assists 10 students to achieve a goal. These goals vary from academic success to personal growth and can be as specific as learning to play an instrument or as broad as better financial management. The life coach integrates elements of development psychology into each session to provide students with problem-solving frameworks to accomplish any goal.</td>
</tr>
</tbody>
</table>
**Prepare Coaches for Goal-Setting, Time Management, Basic Counseling**

These trainings provide coaches with strategies to identify problems and create development plans for individual students specific to any concern. Center directors also invite other support services directors (e.g., counseling center, health center, tutoring services, residence life, disabilities center) to discuss available resources with coaches and provide referral information. Although Institution B partners with Insidetrack to train coaches, no profiled institutions outsource all success coaching initiatives.

**Comparing In-House and Outsourced Training Models**

**In-House Training**
- Shorter, less expensive sessions
- Familiarizes coaches with other staff members
- Broader curricula on resources, information systems

**Outsourced Training**
- Longer, more expensive sessions
- Introduces coaches to professionally-trained advisors
- Situation-and-student-specific curricula

**Insidetrack and Outsourced Coach Training**

Although no profiled institutions outsource success coaching operations, coaches at Institution B receive training from Insidetrack directors. Through this partnership, Insidetrack coaches train success center supervisors on skill development and assessment practices while also training success coaches on problem identification and solution development.

**Examine Budget and Consider Full-Time or Assistantship Coaches**

Directors determine staffing rates by available budget and salaries by highest degree obtained. To minimize costs, directors develop assistantship coaching positions for current master’s or doctoral students, which cover tuition and fees but do not require a salary.

**Coaching Salaries by Degree**
- Bachelor’s degree:
  - $28,000/annual
- Master’s degree:
  - $35,000/annual
- Master’s or doctoral student-assistants:
  - Tuition and fees
Ensure All Coaches Perform Basic Success Coaching Practices

All coaches perform basic success coaching duties, such as problem identification and goal-setting exercises, regardless of where coaching centers are organized institutionally.

Coaching Responsibilities by Coaching Type

- **All Success Coaching**
  - Identify student distresses
  - Discuss personal quandaries
  - Bolster self-confidence
  - Develop leadership skills
  - Explore time management strategies
  - Practice goal-setting exercises
  - Refer additional, concern-specific resources

- **Academic-Success Hybrid**
  - Develop note-taking strategies
  - Practice textbook reading
  - Explore test-taking strategies

- **Life**
  - Discuss goal-achievement progress
  - Offer peer support
  - Identify long-term goals

Separate Success Coaching from Academic Advising

Only coaches at *Institution A* share time between coaching and advising offices. These coaches perform similar duties in both roles but engage in discipline-specific discussions and exercises with at-risk students required to attend advising sessions.

Shared Coaching Organizational Structure

Coaches at *Institution A* also report to the at-risk student advising center, which maintains separate academic advisors. In this collaboration, coaches split time between each office and often counsel the same students. Although at-risk students are required to meet with academic advisors, they voluntarily seek out coaching to achieve academic and general success goals.
3) Student Engagement

**Review Appointment Process to Determine Coaching Demand**

Coaching centers with voluntary, individual sessions receive fewer visits than centers with multiple scheduled sessions. As a result, these centers maintain more coaches to meet demand.

**Student-to-Coach Ratios**

- **Institution B**
  - 32,000 Undergraduate Students
  - 16 Coaches
  - 2,000 Students per Coach
  - Bi-weekly appointments
  - Over 900 student visits annually

- **Institution E**
  - 23,000 Undergraduate Students
  - 7 Coaches
  - 3,286 Students per Coach
  - Voluntary appointments
  - Over 500 student visits annually

**Market Coaching to Students Through Tutors, Faculty Referrals**

Center directors rely on faculty, residential advisor, tutor, and academic advisor referrals to identify students for success coaching programs. Although success coaching is voluntary, directors target marketing to at-risk student populations who are more likely to require additional support, especially during first and second years.

**Student Engagement by Coaching Type**

<table>
<thead>
<tr>
<th>Coaching Type</th>
<th>Student Types</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Success</td>
<td>- At-risk</td>
<td>Coaching directors at <strong>Institution B</strong> invite 20 percent of each first-and-</td>
</tr>
<tr>
<td></td>
<td>- Out-of-state</td>
<td>second year student type to receive success coaching. Directors contact</td>
</tr>
<tr>
<td></td>
<td>- First generation</td>
<td>students through personal emails and letters to parents.</td>
</tr>
<tr>
<td></td>
<td>- High federal loans</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- High credit load</td>
<td></td>
</tr>
<tr>
<td>Academic-Success Hybrid</td>
<td>- At-risk</td>
<td>Faculty recommend struggling students to coaches for time management, study,</td>
</tr>
<tr>
<td></td>
<td>- Probation</td>
<td>and anxiety control strategies. Teaching assistants and residential advisors</td>
</tr>
<tr>
<td></td>
<td>- Faculty referral</td>
<td>also refer students to coaches to improve study habits and test preparation.</td>
</tr>
<tr>
<td></td>
<td>- Residential advisor referrals</td>
<td></td>
</tr>
<tr>
<td>Life</td>
<td>- Goal-oriented</td>
<td>Counseling center staff at <strong>Institution D</strong> refer students to life coaching</td>
</tr>
<tr>
<td></td>
<td>- Faculty referral</td>
<td>sessions for additional self-confidence exercises; most participants are upper-</td>
</tr>
<tr>
<td></td>
<td>- Residential advisor referrals</td>
<td>class students.</td>
</tr>
<tr>
<td></td>
<td>- Counselor referral</td>
<td></td>
</tr>
</tbody>
</table>
Leverage Advising Requirements to Attract At-Risk Students

Although students are not required to meet with success coaches, center directors encourage academic advisors to refer at-risk students from mandatory advising meetings. These students receive discipline-specific planning and advice from academic advisors and practice broader study habits and test preparation exercises with success coaches.

Advising and Coaching Support

<table>
<thead>
<tr>
<th>Advising Support</th>
<th>Coaching Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Major requirements planning</td>
<td>• Time management strategies</td>
</tr>
<tr>
<td>• Discipline-specific tutoring</td>
<td>• Stress reduction techniques</td>
</tr>
<tr>
<td>• Elective course selection strategies</td>
<td>• Test preparation exercises</td>
</tr>
</tbody>
</table>

Grant Coaches Access to Student Grades, Basic Personal Information

Coaches undergo training on institutional databases and FERPA compliance but do not require backgrounds checks or certifications to review student information.

Student Information Accessibility

<table>
<thead>
<tr>
<th>Coaching Type</th>
<th>Information Type</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Success</td>
<td>• Academic <em>(limited)</em></td>
<td>Success coaches may not access student information beyond what is available through faculty referrals or provided by students. Center directors may access complete judicial and financial information but only share information critical to coaching sessions.</td>
</tr>
<tr>
<td></td>
<td>• Personal <em>(limited)</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Financial <em>(director)</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Judicial <em>(director)</em></td>
<td></td>
</tr>
</tbody>
</table>

| Academic-Success Hybrid | • Academic *(complete)* | Although academic-success coaches can access complete transcripts, they may not access any financial and or judicial information. Personal information is only available through student approval. |
|                         | • Personal *(limited)* |             |
|                         | • Financial *(none)* |             |
|                         | • Judicial *(none)* |             |

| Life                  | • Academic *(limited)* | The life coach at Institution D only receives information provided by students, unless the student is a counseling center patron and has met with the life coach previously. |
|                       | • Personal *(limited)* |             |
|                       | • Financial *(none)* |             |
|                       | • Judicial *(none)* |             |
Share Student Information Across Advising Units

Unless students provide information to coaches directly, most centers do not possess access to student’s academic, personal, financial, or judicial information. Center directors must request permissions for this information from separate academic departments and student support units.

Sharing Information across Units

- **Academic:** Center directors request transcript access from individual departments for students with recurring coaching appointments. Some faculty may provide this access when referring students to coaching centers.

- **Personal:** This information may include psychological history, family and relationship situations, and long-term goals. Coaches solicit personal information from students directly to better assist with goal-setting and request information from support units if necessary.

- **Financial:** Directors can access a students’ institution-provided aid package but must request access to federal and household-provided resources. Although students can provide basic information to coaches, registrar staff must grant access to complete aid package breakdowns.

- **Judicial:** Student-judicial administrators only provide access to judicial records if students appeal disciplinary actions. In these instances, coaches can tailor sessions to help students fulfill disciplinary obligations and avoid further penalties.

4) Assessment and Outcomes

**Compare Student GPAs, Graduation Rates to Determine Impacts**

Center directors assess coaching impacts by comparing objective metrics (e.g., GPAs, graduation rates) and subjective metrics (e.g., self-esteem, academic-social balance) for students that received coaching against students that did not receive coaching.

**Success Metrics Impact by Coaching Type**

<table>
<thead>
<tr>
<th>Success</th>
<th>Academic-Success Hybrid</th>
<th>Life</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Time management</td>
<td>- Individual course grades</td>
<td>- Goal-setting skills</td>
</tr>
<tr>
<td>- Anxiety control</td>
<td>- Overall GPA</td>
<td>- Peer support mechanisms</td>
</tr>
<tr>
<td>- Overall GPA</td>
<td>- Core requirement completion</td>
<td>- Self-confidence</td>
</tr>
<tr>
<td>- Self-confidence</td>
<td>- Time to graduation</td>
<td></td>
</tr>
<tr>
<td>- Time to graduation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Dedicate Administrators, not Coaches, to Success Metric Collection

Although students interact with coaches more often than data analysts, coaches do not input information frequently enough to identify and intervene with at-risk students. As a result, directors hire data analysts to collect and synthesize success metric data for coaching review processes and annual reports.

Metrics Collection Process

Coaching Impacts

Coaching Leads to Higher GPAs, Graduation Rates, Self-Esteem

Students that receive success and academic-success hybrid coaching graduate with higher GPAs and at higher rates than students that do not receive coaching. Although life coaching outcomes are more subjective, students report higher self-esteem and stronger personal skills after life coaching sessions.

Success Metrics Outcomes by Coaching Type
Scale Student Metrics, Success Coaching to all Advising Units

Center directors highlight successful coaching practices to train other student support units, such as tutors or career counselors. Contacts explain that most students require individualized coaching rather than impassive advising to overcome academic and personal struggles.

Implementing Success Coaching Practices

**Integrate Success Coaching Basics into all Advising**

Success coaches train academic advisors, residential advisors, and tutors on coaching basics to integrate into daily student interactions. These components include student-driven problem identification practices and long-term goal-setting. Through these strategies, students receive consistent support in each aspect of campus life, including academic advising, career planning, and social development.

**Share Information across Student Support Units**

Coaching directors promote open access to student information across offices and departments that collect student-specific data. Directors collect information in central databases, such as MAP-Works or the Student Success Collaborative, and grant access to other advisors. These databases then analyze student information and inform coaching strategies and early alert systems for all students.
Leadership at a member institution approached the Forum with the following questions:

**Coach Backgrounds and Qualifications**
- What qualifications (e.g., academic backgrounds, certifications) do success coaches possess?
- What training or professional experience do institutions require for coaches?
- How do administrators determine coach staffing rates?
- What is the salary range for these coaches?
- To what extent do institutions contract third-party or private coaches?
- What are the responsibilities of success coaches?
- To what extent do coaches report to multiple institutional units (e.g., academic affairs, athletics)?

**Student Engagement**
- How many students do success coaches oversee?
- What types of students engage with success coaches?
- How do administrators identify students for coaching sessions?
- To what extent do institutions require students to meet with academic advisors?
- How much student information is available to success coaches (e.g., grades, financial information)?

**Success Coaching Impacts**
- How do administrators measure success coaching impacts?
- To what extent do administrators integrate coaching with other student retention initiatives (e.g., early alert systems, academic advising, peer mentoring)?
- To what extent do students with success coaches achieve higher grades than students without coaches?
- To what extent do these students graduate at higher rates than students without coaches?

The Forum consulted the following sources for this report:
- Education Advisory Board’s internal and online research libraries (eab.com)
- National Center for Education Statistics (NCES) (http://nces.ed.gov/)
- Insidetrack (http://www.insidetrack.com/)
- MA²-Works (http://www.webebi.com/mapworks)
- Student Success Collaborative (http://www.eab.com/National-Collaboratives/Student-Success-Collaborative/Members)
The Forum interviewed success, academic-success hybrid, and life coaching directors at large public institutions with notable student success initiatives.

A Guide to Institutions Profiled in this Brief

<table>
<thead>
<tr>
<th>Institution</th>
<th>Location</th>
<th>Approximate Institutional Enrollment (Undergraduate/Total)</th>
<th>Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution A</td>
<td>South (City, Small)</td>
<td>20,000/25,000</td>
<td>Research Universities (high research activity)</td>
</tr>
<tr>
<td>Institution B</td>
<td>South (City, Midsize)</td>
<td>32,000/41,000</td>
<td>Research Universities (very high research activity)</td>
</tr>
<tr>
<td>Institution C</td>
<td>Midwest (Suburb, Small)</td>
<td>17,000/23,000</td>
<td>Research Universities (high research activity)</td>
</tr>
<tr>
<td>Institution D</td>
<td>South (Suburb, Large)</td>
<td>50,000/58,000</td>
<td>Research Universities (very high research activity)</td>
</tr>
<tr>
<td>Institution E</td>
<td>Midwest (City, Small)</td>
<td>23,000/30,000</td>
<td>Research Universities (high research activity)</td>
</tr>
</tbody>
</table>
## Appendix: Profiled Institution Coaching Centers

<table>
<thead>
<tr>
<th>Institution</th>
<th>Coaching Type</th>
<th>Number of Coaches</th>
<th>Coaching Education</th>
<th>Housed Organizationally</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution A</td>
<td>Academic-Success Hybrid</td>
<td>2</td>
<td>Counseling doctoral students</td>
<td>Academic Affairs</td>
</tr>
<tr>
<td>Institution B</td>
<td>Success</td>
<td>16</td>
<td>At least Bachelor's degree</td>
<td>Academic Affairs</td>
</tr>
<tr>
<td>Institution C</td>
<td>Academic-Success Hybrid</td>
<td>4</td>
<td>At least Master's degree</td>
<td>Academic Affairs</td>
</tr>
<tr>
<td>Institution D</td>
<td>Life</td>
<td>1</td>
<td>PhD in Psychological Counseling (counselor in the counseling center)</td>
<td>Student Affairs</td>
</tr>
<tr>
<td>Institution E</td>
<td>Academic-Success Hybrid</td>
<td>7</td>
<td>At least Master's degree</td>
<td>Student Affairs</td>
</tr>
</tbody>
</table>