



CALPOLY



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2025-2026 UNIVERSITY ADVISING RETENTION YEAR END SUMMARY



Empathy • Connection • Advocacy • Student Centric • Equity

INTRODUCTION

Established as part of the campus' Graduation Initiative 2025, University Advising Retention has adapted to evolving CSU priorities while remaining committed to increasing retention and graduation rates and closing Cal Poly's graduation equity gaps. To support these goals, we strengthen the effectiveness of academic advising at Cal Poly through the use of data-informed decision-making, proactive and time-sensitive advising, student transition support, policy advocacy, and inclusive practices, ultimately expanding the depth and reach of cross-campus advising efforts. This report outlines the unit's primary goals and achievements for the 2025–2026 academic year.

VISION

We envision a student-centered and compassionate campus community where the path to graduation for all Cal Poly students is free of institutional barriers, guided by equitable policies, and bolstered by proactive advising.

MISSION

Our mission is to put students and equity first in Cal Poly's efforts to increase persistence and graduation rates. The University Advising Retention team prioritizes proactive advising strategies, reengages students taking time off, provides time-sensitive outreach to students at-risk of being discontinued, and cultivates a culture of care. We amplify student voices, leverage data, and nurture campus relationships in our efforts to make positive change and remove institutional barriers.

**Indicates semester conversion and/or Maritime Academy integration efforts*

RETENTION PRIORITY 1:

Intervene early with students at risk of stopping out, manage campus time-off, departure, and related reenrollment barrier mitigation processes with personalized support.

Responsible for all campus, student-facing time off and departure processes, University Advising Retention ensures that students, often in the midst of personal, financial and academic difficulties, feel seen and remain connected to Cal Poly. Each intervention is individualized based on several reenrollment barriers, all of which are addressed and mitigated through these interactions.

Informal Time Off

Students who inform Cal Poly/Retention that they are taking one or two consecutive quarters or one semester away are sent individualized emails addressing all reasons indicated for their time away and important reenrollment guidance. Submissions are screened for and students called if they indicate urgent well-being concerns including mental health, campus climate, time-sensitive financial and reenrollment concerns.

766

Students Taking Informal Time Off Supported

Active Not Enrolled (ANE)

Students not yet enrolled at the end of first-round registration and/or at each term Census are emailed according to their graduation status, risk of being discontinued and units waitlisted reminding them of upcoming enrollment dates, options for time off, the need to extend their graduation term and support available. Based on equity and academic markers, a subset of students receive a phone call at term Census.

558

ANE Students Called

5,078

ANE Students Emailed

University Departure

Students who notify the Registrar and Retention of their plans to permanently leave Cal Poly provide valuable information related to their needs and reasons for departure. We ensure students have dropped or withdrawn from classes to initiate the discontinuation process and avoid unintended fees or WU/F grades for non-attendance. Each student receives a personalized email outlining important resources and opportunities for continued support including bias reporting processes and transferring to another school. Responses are later coded to identify emerging themes.

288

Departing Students Supported

**Indicates semester conversion and/or Maritime Academy integration efforts*

Leave of Absence Approval and Return Guidance

Each student who submits an application for Leave of Absence (LOA) is guided through the process - maximizing available time away, mitigating reenrollment barriers and finding support they may need. We then contact students the term before their expected return with registration and transfer credit information and the option to extend LOA if available. identify emerging themes.

208

Students Supported Through Formal Leave Process

270

Students Returning from Leave of Absence Reengaged

All Dropped Units

In collaboration with the Dean of Students and Office of the Registrar, the Retention team contacts students who drop all units during the add/drop period to ensure students have the personal and academic support they need.

166

Academic & Personal Well-Being Check-ins Conducted

**Indicates semester conversion and/or Maritime Academy integration efforts*



RETENTION PRIORITY 2:

Supply data infrastructure enabling advisors to intervene earlier and more effectively, minimizing impact on advisor workload.

Retention provides a range of academic trend data to campus partners and leadership as well as actionable, student-level data to academic advisors for proactive advising. This includes recurring reports aligned to the academic calendar and focused on identifying at-risk students, supporting timely graduation, monitoring Cal Poly Scholars KPIs, and informing college- and program-level decision making. Sample recipients include College Advising Centers, Cal Poly Scholars Program, EOP, University Advising Leads, Transfer Center, Deans and Associate Deans, and individual academic departments. These datasets and reports are heavily concentrated around these three institutional functions: Student success and academic intervention (~45%), graduation and degree completion (~30%) and enrollment and registration management (~25%).

MAJOR REPORTING THEMES

THEME	EXAMPLES	PRIMARY PURPOSE
Cal Poly Scholars KPI Tracking	Below full-time reports, APDQ reports, AP appointments, Scholar/At-large comparisons	Monitor scholar success metrics and required interventions
Enrollment & Registration	Students enrolled in 1–11 units/ below full-time, new transfers, fall enrollment*	Ensure full-time enrollment and support registration
Graduation & Degree Progress	Red DPR reports*, stalled graduation lists*, expected graduates*, GPA risk	Improve degree completion and proactive graduation outreach
Academic Risk / Success	APDQ, GPA 2.0–2.3, Off-Track EAP, Academic Markers	Early identification and intervention
Program-Specific Support	EOP, MBP, BCSM, CAFES, OCOB, College Possible, Guardian Scholars	Targeted advising and student support for campus partners
Planning & Assessment	*ICMAs in progress and inquiries, Architecture minors, DFW analytics, Annual Reports	Academic planning and institutional decision making

45

Individual College, Department, Leadership & SEMSA Data Requests Fulfilled

20

Actionable & Proactive Advising Data Sets Provided to College Advising Centers

**Indicates semester conversion and/or Maritime Academy integration efforts*

RETENTION PRIORITY 3:

Expand the reach of the academic advising community, supporting college advising services by delivering inclusive practice education, facilitating centralized proactive advising campaigns and providing direct support to Cal Poly Scholars and students taking time off.

University Advising Retention serves as an extension of and bolster for our advising partners, supplementing their work by conducting proactive advising on behalf of all colleges, equipping advising centers with data to support tailored outreach, expanding advising access and providing long-term case management for students, as well as leading inclusive professional development that strengthens advising knowledge, skills, and practice.

1. Campus-wide Proactive Advising Campaigns Retention facilitated a total of 42 campaigns during the 2025-'26 academic year. All outreach is designed to address academic, personal and reenrollment barriers with empathy.

FOCUS AREA	EXAMPLES OF OUTREACH
Scholar Success (18 campaigns; 6,522 contacts)	Cal Poly Scholars, Mosaic, and Fortune Scholars enrolled in 1–11 units; Year 2+ and Transfer Scholars' introductions; students not meeting advising requirements; students with registration holds; students with GPAs below 2.5; students off-track in EAP; students in disqualification status; students with incomplete grades.
Enrollment & Persistence	Students enrolled in 0 units after registration; students who withdrew from all courses; students either requesting or scheduled to return from Leave of Absence; students at risk of discontinuation; students needing reenrollment support.
Academic Progress & Degree Completion	CLA students within 16 units of graduation following denial, discontinuation, or dismissal; seniors with incomplete grades; graduation risk outreach; advising referrals and academic planning support.
Targeted Student Populations	Cal Poly Scholars, Mosaic, Fortune Scholars, EOP, TRIO, Athletics, transfer students, and other students identified through academic or enrollment indicators.

42

Centralized Email or Call Proactive Advising Outreach Campaigns Conducted

> 12,000

Students Contacted

**Indicates semester conversion and/or Maritime Academy integration efforts*



2. College Advising Center Support

The Retention team supports college-wide advising events, provides additional advising access, participates in program planning and conducts proactive outreach for their designated college advising centers.

LARGE-SCALE ADVISING	PLANNING & CONSULTATION	PROACTIVE STUDENT SUPPORT
Wow and SLO Days	Department and college Semester conversion planning	Targeted outreach to specific student populations
Incoming Transfer advising & schedule reviews	Summer college department planning meetings	MBP outreach
Q2S workshops*	Readmission onboarding redesign	BUS 100 advising
Semester conversion support*	ITO/Departure data consultation	First-year Block Schedule review
Department presentations	Associate Dean data needs planning	Graduation Check outreach
Leadership panels	Process improvement Policy consultation	Stalled graduation outreach Academic Success Agreements College Drop-in Coverage

3. Advancing Inclusive Advising Practice

University Advising Retention demonstrates a strong commitment to continuous learning by actively engaging in professional development focused on diversity, equity, inclusion, and belonging (DEIB). Team members participated in a wide range of educational opportunities throughout the year, including the State of Indigeneity, Transgender Day of Remembrance, Diversity Partners Network, SAFER programming, Pride Faculty and Staff Association leadership, mental health and suicide prevention initiatives, and partnerships with the Department of Rehabilitation. These experiences strengthened the team’s cultural responsiveness and enhanced its ability to provide inclusive, student-centered support.

Building on this foundation, University Advising Retention coordinated the 2025–2026 Academic Advising DEIB Professional Education series, The Power of Voice: Advancing Equity Through Storytelling, extending learning opportunities to the broader advising community and increasing campus capacity for inclusive advising practices. The year-long certificate series took the form of a book circle, a day-long retreat, on-going education sessions and coordinated advisor affinity groups, culminating in a recognition luncheon. Together, these initiatives strengthened advisors’ capacity to advance equity, cultivate belonging, and support student success through more inclusive advising practices.

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OVERVIEW

The Power of Voice

Advancing Equity Through Storytelling Certificate

Summer Book Circle

Black. Fat. Femme by Dr. Jonathan Paul Higgins

Fall Advising Retreat

Positionality and identity

5 Academic Year Sessions

Disability Inclusion

The power of public narrative

Self-Authorship

Using data to tell the student story

Advising for belonging and student success

2 Advising Affinity Groups

First-Generation

Latinx Advisor Cafecito

“ ADVISOR TAKEAWAYS ”

“Thank you for such a great retreat. I really appreciated the opportunity to self-reflect and listening to others advisors stories. This was so helpful for my role as an advisor.”

“Knowing our worldview and our core values of integrity are pivotal going into an advising discussion. Thank you for this foundational reminder. It is easy to get caught up in “rightness” at the expense of righteousness...the larger need of compassion and equity.”

“I really appreciated the 1-on-1 breakout rooms to discuss our narratives. It was a great opportunity to get to learn more about the co-worker I was matched with. We don't have a lot of opportunity to chat with folks in other departments much, so I thought that was a great aspect of the meeting.”

“I love how we can connect these learnings about data to shape the stories we tell about our students, this campus, our work, and so on. Thank you so much!”

“I admittedly was a bit skeptical about how to incorporate a personal story into an advising appointment, especially in relation to the identities on the wheel. So it was very relieving/ insightful/inspiring to learn practical strategies and other topics for sharing that can help facilitate connection, and I'll definitely be making it a more intentional part of my practice.”

RETENTION PRIORITY 4:

Remove structural barriers to retention and graduation by advocating for and facilitating system-level, equitable, and student-centered policies and practices.

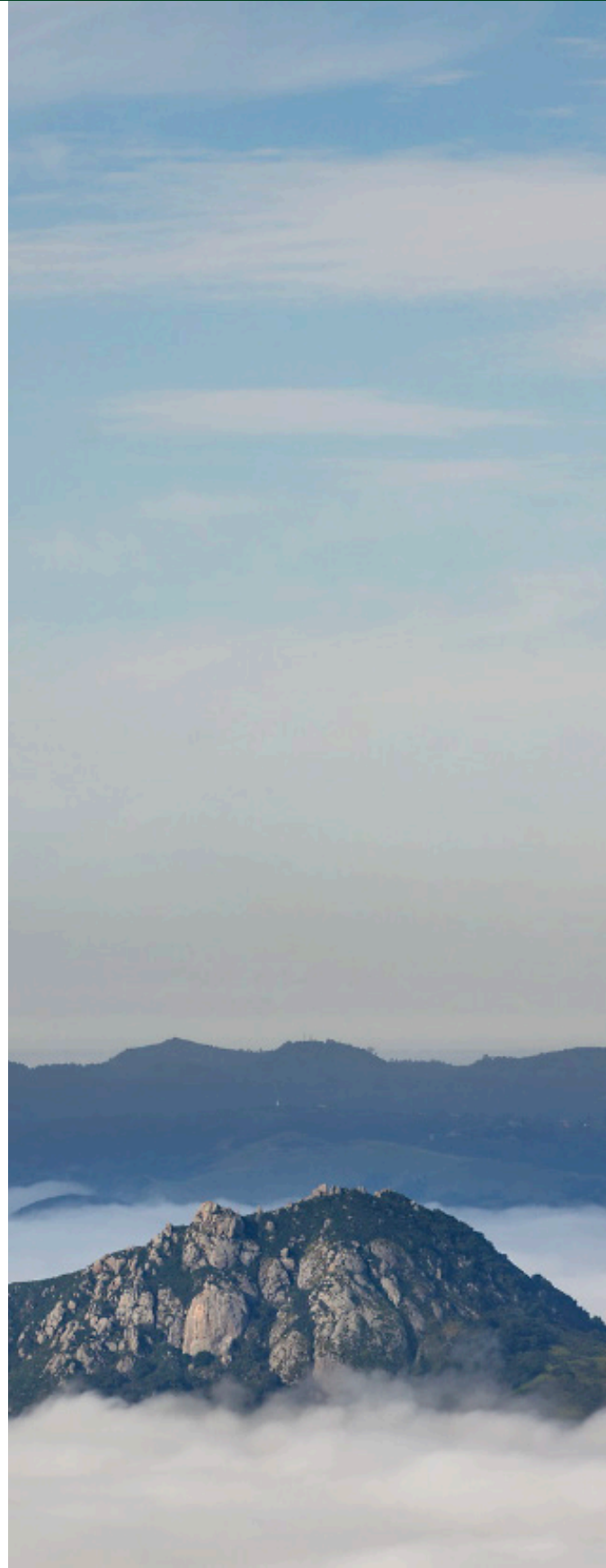
1. CAMPUS LEADERSHIP

University Advising Retention is recognized across campus as a trusted partner in advancing student retention, well-being, equity, and proactive advising. The unit's expertise has helped shape institutional policy, process development, and transparent communication, ensuring student success perspectives are incorporated into university decision-making.

*During semester conversion and Maritime integration, University Advising Retention represented advising and student success through participation on the Academic Notice/Subject to Dismissal and Change of Major policy revision and Office of the Registrar website workgroups, Academic Senate Executive Board, the Instruction Committee, the Academic Assessment Council, and other institutional planning groups. The team contributed to policy and planning discussions related to Credit/No Credit, year-round operations, campus governance, and other major institutional initiatives, while advocating for the essential role of advisors in shared governance and helping shape equitable, student-centered processes.

Retention manages Cal Poly's centralized Change of Major portlet, which facilitated over 1,425 eligibility inquiries this year. Our team tracks all submissions and status updates and records this information in 1Stop. Retention also works with ITS on student and coordinator access and system functionality. Further, Retention ensures department accountability for student follow-up and initiates outreach to students who are ineligible for an ICMA to provide support, resources and options for moving forward.

**Indicates semester conversion and/or Maritime Academy integration efforts*



2. INSTITUTIONAL INITIATIVES

***Change of Major: Semester Conversion and Maritime Integration**

University Advising Retention played a lead role in the university-wide implementation of Change of Major policy and process updates associated with semester conversion and Maritime integration. Working collaboratively with the Office of the Registrar, Evaluations, ITS, college advising centers, Mustang Success Center, faculty, and departmental partners, the team developed consistent policy guidelines, workflows, and communication strategies that promoted transparency, equity, and operational efficiency.

Key accomplishments included working with ITS on updates to the Change of Major portlet and associated workflows to reflect distinct San Luis Obispo and Solano campus processes; partnering with Evaluations to develop interim ICMA procedures and new edit and extension processes; creating standardized website templates to improve policy transparency across colleges and departments; and coordinating comprehensive campus communications outlining policy changes and implementation timelines.

To support consistent application of the revised policy, University Advising Retention designed and delivered presentations and training for advising professionals, faculty, department coordinators, and campus leadership, including small group presentations to Career Services and CASS. The team also developed and launched an online comprehensive Change of Major Canvas training course covering policy interpretation, equity considerations, eligibility criteria, ICMA implementation, portlet functionality, website requirements, and procedures for managing edits and extensions. These efforts established a sustainable training infrastructure and promoted consistent, equitable implementation of Change of Major policies across the university.

***Semester Time Off Policy**

University Advising Retention led the implementation of semester-based Time Off policy and process updates in support of semester conversion and Maritime integration. In partnership with the Office of the Registrar and Records, the team coordinated revisions to policies, terminology, procedures, and student-facing communications to ensure a seamless transition and consistent application across the university.

The team redesigned and updated the Drops, Withdrawals, and Leaves website and the University Advising Retention website to reflect semester policies, revised time-off allotments, transition guidance, and updated procedures. These efforts improved the clarity and accessibility of information for students, faculty, staff, and campus partners while supporting consistent interpretation of new policies.

To further promote campus awareness and successful implementation, University Advising Retention developed communication materials, including social media resources and outreach content, for distribution by campus partners.

***Academic Notice/Subject to Dismissal Policy and Procedures**

As part of the APDQ workgroup, University Advising Retention contributed significantly to the development of the Subject to Dismissal appeal form and process design. Additionally, Retention updated website content with a focus on consistent, student-centered implementation.

GE Pattern Transition

University Advising Retention consulted on revisions to the transfer credit website in order to increase transparency and clarity, streamline communication, and remove barriers to transfer process.

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3. CROSS-DIVISION PARTNERSHIPS & COLLABORATION

University Advising Retention serves on several campus-wide student success committees, strengthening cross-divisional collaboration and informing proactive advising interventions, data sharing, and updates to retention and partner practices. Key partnerships are outlined below and include: the Transfer Academic Onboarding Group, Students with Dependents, APDQ Policy Review Committee, Basic Needs Taskforce, Disability Access and Inclusion Committee, College Students of Concern Team and the Student Success Advising Workgroup.

Student Support Partnerships

- Monthly Student Success Advising Meetups
(Cal Poly Scholars, EOP)
- Career Services presentation on Retention processes and Intent to Leave findings
- Fortune/MOSAIC event program introduction
- Dean of Students collaboration on All Dropped Units outreach
- Collaboration with Maritime academic advisors to implement retention efforts on their campus
- Meetings with EOP/CP Scholars director to plan AY caseloads/expectations
- Provide requested support for identified MOSAIC and Fortune Scholars
- Dream Center drop-ins
- Retention drop-ins at La Casa
- College Students of Concern teams
- Disability Access and Inclusion committee
- Students with Dependents committee and relevant content added to the Navigating Time Off website
- Basic Needs Taskforce

Academic & Advising

Collaboration

- Transfer website review and transfer credit website workgroups
- CTLT collaboration on the Change of Major Canvas implementation guide
- Change of Major contact and workflow updates with ITS, Office of the Registrar, and Evaluations
- Discussions regarding AP/CLEP articulation updates
- Support for FSP 2.0 planning
- Transfer Academic Onboarding workgroup

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Operations & Institutional Support

- *ITS collaboration to launch the Spring 2026 Change of Major portlet workflow
- SLATE development (communications, data elements, values translation, Intent to Leave updates)
- Identified and resolved Program Plan registration issue with Registrar/Evaluations
- Participation in the CSU Student Success Framework Forum
- Search committees (EOP Student Success Counselor, RESET Program Analyst, CENG Advisor)
- Graduate assistant recruitment and hiring collaboration

Campus Engagement Participation:

- Dean of Students Summit
- SAFER Staff Event
- Student with Dependents office hours and Trick-or-Treat events
- Building 15 Student Services Open House
- Transfer Week Resource Pop-In
- Semester Conversion Carnival
- Semester Readiness Fair
- Graduate Recruitment Fair



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“ FEATURED STUDENT IMPACT ”

“Thank you so much, you are amazing! Thank you for being such a large part of my guidance throughout my college career. I appreciate you! “

“I just wanted to take this moment to genuinely say from the bottom of my heart how much of a support system you are and how well you are doing in your profession. You do not understand how much you have helped me, even through just reviewing my form. Thank you so much, I truly appreciate it.”

“Thank you so much for your thoughtful and detailed email, I truly appreciate all of the time and care you put into this; it honestly answered so many of the questions I’ve had and made this whole process feel much clearer and less overwhelming. You have genuinely been one of the most helpful people I’ve worked with during this entire experience, and it means a lot to feel so supported while navigating everything!”

“I really want to thank you for your support in helping me drop my courses. Your help made this process much more comfortable during a really difficult time, and I truly appreciate it.”

“I am the young man who reached out to you at the beginning of winter quarter. At the time, I was going through a tough situation and didn’t know where to turn, but you were there for me. I want to express my deepest gratitude. I truly don’t know how I would’ve gotten through that period without your support. Thanks to you and others, I’ve learned to stop being so hard on myself.”

“ RETURNING STUDENTS ”

“Returning to finish had been on my mind for quite some time after taking a long break, so your call truly felt like the sign and push I needed to finally take the step to complete it. :.)”

“Thanks for not giving up on me, and checking on me throughout this journey. I’m so happy now”

“ SUPPORTERS ”

“I am writing this email to thank you for being there for him. We cannot thank you enough for taking the time to meet with him and guide him through the steps that will hopefully persuade the university to reconsider their decision. As a parent, it has been extremely difficult to hear that my son felt alone with nobody to turn to. We are so grateful that he found someone to stand with him...regardless of the outcome.”

“I just wanted to thank you so much for your reply. It helped clarify things for me... Thank you again. I just really appreciate having someone to email in cases like this.”