**Strategic Caseload Management Checklist**

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| **AT THE START OF EACH…** | |
| **SEMESTER** | * Review your entire caseload to prioritize based on:   + College start date (earlier start date requires an earlier outreach!)   + Distance from home (prioritize students who will be going away)   + Level of “need” (based on Benchmark data)   + College Type (2 year students should be prioritized)   + Class (reach out to freshmen first, then sophomores, etc) * Work with your manager and team to set goals for:   + Date to complete early semester check-ins with all students   + Date to complete Benchmarks   + Frequency of student outreach (monthly? Bi-monthly?) * Gather important dates for campuses where you support KIPPsters:   + Registration   + Drop/add deadlines   + Financial aid deadlines   + Midterms |
| **MONTH** | * Review Last Outreach/Last Successful Contact report and print.   + Set a goal for how many students from this list you’ll contact and split it up by week * Review last month’s student Benchmark data   + Make plans (and time) to follow-up with high-need students   + Prioritize students who still need a benchmark assessment * Plan campus visits for the month (prioritizing campuses with large clusters of students), keeping in mind key dates like days off and/or study-periods for midterms, etc. |
| **WEEK** | * Map out your outreach (call/text/email). Think about:   + Groups of students who need specific messages (i.e. all first-years at De Anza)   + Individuals to follow-up with about specific action steps   + Emails/reminders to your whole-caseload   + Giving students a one-week advance notice of when you plan to visit campus * Review Last Outreach/Last Successful Contact goals and spread out outreach throughout the week * Review coaching-action items related to Benchmarks (use task filter if you use tasks in Salesforce)   + Block enough time to handle all critical student coaching needs |
| **DAY** | * If you use “tasks” in Salesforce, check them to make sure you’re taking care of coaching action-items. If you use another reminder system, check that! * Check your weekly plan and send any communications or additional outreach you had planned * Reach out to your targeted students from your Last Outreach/Last Successful Contact report * Handle triage as it arises |