**Strategic Caseload Management Checklist**

|  |
| --- |
| **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
 |