

## UCSC Undergraduate Academic Advising Year End Report, 2004-05

The UCSC academic advising community rose to the considerable challenge of implementing a new degree audit system and field-testing a number of new approaches to advising practice in 2004-05. It is through the significant efforts of many on campus that the year ends with knowledge gained through circumspective review and a willingness to move forward to the next steps. This report reviews progress to date and proposes next steps for 2005-06.

### Advising Initiatives, 2004-05

#### Academic Information Systems (AIS)

In the first year of a full campus implementation, Academic Information Systems (AIS) rapidly replaced Student Information Systems (SIS) as the program of record for the campus. While the internal development of AIS had extensive planning and testing, the rollout to the campus was swift and produced immediate changes to how student information is maintained and retrieved, how students access academic information and prompted examination of campus advising practice. The UCSC advising community must be acknowledged with gratitude for their flexibility, ability to think and work creatively with an unfamiliar and complex new system and for their determination to move forward effectively.

The introduction of AIS mandates new responsibilities for users and shapes changes in workloads. A growing level of frustration from users was clearly exhibited in fall quarter and much of the system necessitates constant diligence. The “vanilla” nature of AIS requires extensive review and requests for ongoing “fixes” to the system. However, as the year progressed, the system is functioning to support enrollments, monitor student records and to produce degree audits. In the third cycle of grading, faculty submitted grades easily, yet meeting the deadline is still a problem and delays completion of year-end academic review.

Through AIS, the campus can now deliver generalized or specific information to students via the Portal; units can target information to distinct groups of students on an ad hoc basis (using bulk email) and send mass emails (mail merge) to deliver time-sensitive information.

#### AIS Training

The new AIS environment challenged the campus to rapidly learn a complex and multi-layered system while the academic year was quickly underway. To address the training needs of staff and faculty an instruction series was designed and implemented. All users were given AIS access and security was issued to the entire campus; all appropriate users received training for:

- Introduction to AIS
- Understanding Academic Advisement
- Working with Student Records
- Introduction to Cognos Upfront and PowerPlay (accessing AIS reporting data)
- Advising Super User Training
- Degree Audit Workshop
- Open Lab Fridays

Specific training for academic programs and colleges was offered from January–March 2005 on Program Plan Changes, Student Exceptions, Milestones and Assigning Advisers. At the end of spring 2005, 532 users completed various Adviser / AIS-related trainings.

*Degree Audit Workshops* were added to the training curriculum in winter 2005, and are offered monthly. To date, five sessions have been held with 50 staff attending.

As users gain mastery in AIS, additional security (such as Super User) is authorized. As roles and responsibilities change, or new staff is added, training is available. Staff may repeat trainings at any time and Open Lab Fridays allow for specific topics to be addressed.

#### Report Writing Function

Report writer training is underway using *Impromptu*. A report writing team from the academic programs and the colleges meet regularly. To date, approximately 10 staff has completed report writing training; it is anticipated that a broad range of users will be trained and use reports for their job related functions in the next year.

#### UCSC Mass Email Program

In conjunction with report writing, the UCSC Mass Email Program is now used (replacing hard copy in many cases) to notify all students of under enrollment, undeclared status, pending undeclared status, impending expected graduation term and notification of academic standing.

#### Student Advising Summary Page

The Student Advising Summary page has been released into production (phase 1a). Emergency fixes include, "hot keys or smart tabbing," NRI, Service Indicators, To-Dos, Local Phone, Graduate Student and Non-Degree seeking statistics are in development. The next step will release this information to students (phase 1b).

Based on user comments, phase 2 will require further development to include Leave of Absence status, enrollment detail by quarter and alphabet listing, extending Student Milestone detail, graduate student advanced to candidacy status and expanded search options.

Through the extensive contributions of Tchad Sanger, Coordinator, Advising Support, the campus has ongoing access to an expert with up-to-date knowledge of advising practice and one who supports staff as they master the system and who can tailor trainings to fit the specific needs of the user. Tchad has earned the well-deserved appreciation of the entire campus.

#### AIS Degree Audit

In 2004-05, degree audits were designed, tested and released to production for all proposed and declared majors and minors in the departments of art, economics, literature, psychology and all programs in the School of Engineering.

Since introducing degree audit access on June 16, 2004, over 100,000 have been run by students and staff (as of the end of spring 2005). From 11,949 undergraduates, full degree audits are available for 37% (or 4,457) of the students, (510 art, 1,264 economics, 785 literature, 1,291 psychology and 607 in the School of Engineering). All undergraduates have university and general education requirements available through a degree audit.

Additionally, eighty-four plans (majors) and sub-plans (concentrations) have full degree audits (3 art plans/sub-plans, 7 economics plans/sub-plans, 49 literature plans/sub-plans, 5 psychology plans/sub-plans and 20 School of Engineering plans/sub-plans). To date, 902 course lists, 249 requirements and 1,012 requirement groups have been designed, tested and released to production.

To support the advising community, the help desk has answered hundreds of questions and resolved as many problems. During this time, 116 advising related "bugs" were identified, researched and reported with 106 successfully resolved. Eight PeopleSoft patch/fix bundles were tested, signed off and released to production. In addition, ten HR bundles were tested, signed off and released to production.

These accomplishments are due principally to the exceptional work of Terry Hart, AIS Advising and Degree Audit Process Manager.

### **Campus-wide Advising Consultation**

Early in 2004-05, and as AIS was rolled out to the campus, consultations and trainings that centered on learning basic AIS functions and discussion of new approaches to advising practice were held. Throughout the year ongoing dialogue continued.

### Advising Focus Groups

The primary objective of convening Advising Focus Groups is to capture a wide range of comment on current advising practice, to discuss the stimulus for review of advising services and to create a higher profile on campus for academic advising. Discussion centered on the impact of AIS implementation to the user community, understanding AIS security roles, summer orientation and reviewing, in general, campus advising practice and resources.

Eight groups were convened in September/October 2004 with undergraduate and graduate program advisers, college preceptors and advisers, learning support staff (EOP, STARS, OIE, etc.) and a few faculty. During fall 2004, related presentations were given to an all-campus department managers meeting, AIS-Department Solutions Workgroup and to college preceptors. In all, 114 individuals participated. A report of focus group discussions was posted at [advising.ucsc.edu](http://advising.ucsc.edu) on November 15, 2004; participants were notified by email.

### Continuing Campus Dialogue

In addition to the Advising Focus Groups, and ongoing consultation with units, three all campus sessions were held in 2004-05 to discuss advising related issues.

At the request of the advising community, a meeting of program advisers and managers, college advisers, and learning support units was held on December 14, 2004 to discuss proposed changes to advising practice, AIS implementation and concerns, First Year Advising, issues of student retention, staffing patterns and summer orientation. Meeting notes were distributed to the advising community.

As an outcome of the December meeting, an all campus meeting with Vice Provost and Dean of Undergraduate Education (VPDUE) Bill Ladusaw, was held on January 18, 2005. Issues raised at the December 2004 meeting were discussed.

College and program advisers and department managers were invited to attend a year-end meeting on May 20, 2005 with VPDUE Ladusaw to review work to date and to confer on the next steps.

### First Year Advising

First Year Advising (FYA) allows students to integrate smoothly into the university community and supports the campus goal of retaining students to graduation. FYA is a new approach to advising entering students (frosh and transfers) to assist them in seeking learning support and academic programs that they need to be successful at UCSC. The FYA Task Force met diligently in winter/spring 2005; the outcome of their efforts are clear program goals and guidelines for advising students at each stage of their first year of enrollment. Program goals and charts of first-step tasks for advisers and students were distributed to the colleges (FYA goals are posted on the Undergraduate Advising Center site). A campus update on FYA will be posted at the beginning of the academic year.

### Online Declaration of Major/Minor Form

In fall 2004, the *Proposed Study Plan Declaration of Major/Minor* form, and instructions, moved online and is posted on the Office of the Registrar website. Current practice is for colleges to enter student information online and print or download for hand entry.

### Early Academic Advising Clusters

Early Academic Advising Clusters give prospective students general and specific information on academic programs offered at UCSC. In winter 2005, academic programs reviewed and submitted updates to coursework and contact information for 2005-06. Clusters information is posted on the Office of Admissions website (and the Undergraduate Advising Center site) for applicants to review prior to the May SIR deadline; students who SIR and select a cluster are then provided additional information on the cluster they chose.

### **Training Opportunities**

#### Winter 2005 Academic Advising Forum

The third annual Academic Advising Forum, *Innovative Advising for the New Student: New Approaches to Advising Practice* was held on March 1, 2005 in the Stevenson Event Center. New this year, department managers were invited to attend, in all 91 staff participated in this all day event. The Forum offered a half-day training, *Practical Strategies for Navigating Through Change*, facilitated by Barbara Perman and Donna Weeks, UCSC Training and Development, (notes from the training were posted on [advising.ucsc.edu](http://advising.ucsc.edu)). In the afternoon, VPDUE Ladusaw presented, *The Roadmap for Advising Reform*, questions and answers followed. A presentation on staff access to the Portal and a report from ADEPT completed the Forum.

#### NACADA: Academic Advising Today

To provide the advising community with access to current advising research and practice, all advisers and related staff receive periodic emails on how to view or download the NACADA quarterly newsletter, *Academic Advising Today*.

#### UC Academic Advising Conference

UCSC participates in the annual UC Academic Advising Conference. This year, thirty-eight staff attended the conference: *RADICAL, Radical Advising Directions in California*, hosted by UC Berkeley on May 4 – 6, 2005. Our campus was well represented by a workshop: *ADEPT: A Grassroots Approach to Advisor Training*, presented by Sarah Rogerson, Cowell, Stacey Sketo-Rosener, Kresge and Lynne Wolcott, Cowell.

#### Academic Advising Staff Training Needs Survey

To better determine the training needs for the campus advisers, a broad range of campus staff and faculty were invited to complete an *Academic Advising Staff Training Needs Survey*. The online survey is open for comment from June 16-30, 2005. Survey results will assist in framing training options for 2005-06.

### **Next Steps Advising Initiatives, 2005-06**

As the campus begins its second year of AIS and continues to explore new approaches to advising practice, the overarching goal is for the advising community to gain mastery of AIS and persist in enhancing advising services. Opportunities for dialogue, program planning and ongoing AIS skill development will continue. Campus advising improvement and enhancement will gain focus in 2005-06, centering on our primary client, the student.

### **Academic Information Systems (AIS)**

The principal goal for 2005-06 is for all AIS users to gain mastery and develop competency of the system, as it relates to individual job responsibilities. As new users are introduced to campus, training and support will be in place to assist in skill development to master AIS. It is expected that a broad range of users will learn COGNOS and incorporate report writing into their skill set to meet the needs of their unit and to provide information to students via mass emails, through the Portal and on campus web sites.

Functionality for *Personal Comments* in AIS will be delivered early in 2005-06. *Personal Comments* are part of the student record and viewable by all staff (however, not students). Security can be applied on the individual level to Read/Write comments.

### **Academic Advising Steering Committee**

An Academic Advising Steering Committee (AASC) will be established early in 2005-06 and begin work in fall quarter. The AASC will address key issues concerning academic advising practice at UCSC. Committee responsibilities include, but are not limited to, research and program analysis and forming recommendations and making decisions on advising practice. A wide-range of campus units will be represented on the committee appointed by VPDU Ladusaw, based on their individual knowledge and skills that they bring to the committee.

The anticipated agenda includes; evaluation and recommendations for the process by which students declare a major(s)/minor, review of campus academic advising procedures and make recommendations, develop campus-wide policy and procedures for the maintenance and storage requirements for student records in the new AIS environment and assess training standards for new academic advisers.

A CUIP Intern has been identified and will be on board in fall 2005 to provide a student voice and assist the campus to further understand student needs on a broad range of advising services.

### **First Year Advising Benchmarks**

The colleges manage First Year Advising (FYA) beginning in summer/fall 2005. Students attending Summer Orientation 2005 are introduced to the concepts of FYA during college orientations; in fall 2005 the colleges will assist all entering students to manage FYA goals.

#### First Year Advising Benchmarks

FYA is complete when the student has confirmed, or modified, a proposed major with the college, or has declared with an academic program.

Frosh: FYA is complete by the time the student has earned the 45<sup>th</sup> credit (excluding transfer and AP/IBH credit).

Transfer students: FYA is complete by the second quarter of Enrollment (no credit requirements).

### **Plan Management in AIS**

In 2005-06, the AASC will explore the process by which students declare a major. However, the AIS environment now permits the approving unit to enter changes to the student's Program

Plans. To prepare and train users, *Advising Super User* training was offered in 2004-05 and is available in summer/fall 2005. All users are expected to complete training by the end of fall 2005. All academic programs, and the colleges for First Year Advising, will transition to entering program plan changes in AIS for single majors by the end of winter 2006 and for all programs by the end of spring 2006. At this time the Office of the Registrar will no longer enter program plans changes in AIS.

#### Plan Change Transition Calendar, 2005-06

Fall 2005	Colleges enter plan changes for proposed majors for FYA
End of Fall 2005 (December 8, 2005)	All users complete <i>Advising Super User</i> Training
Winter 2006	Documentation and training for entering multiple plans
End of Winter 2006 (March 23, 2006)	All plan changes for single majors entered by the program
End of Spring 2006 (June 15, 2006)	All plan changes entered by the program
June 15, 2006	Office of the Registrar no longer enters plan changes
To enroll for training: <a href="http://ais.ucsc.edu/training/">http://ais.ucsc.edu/training/</a>	
Training documentation: <a href="http://ais.ucsc.edu/training/Adviser_Training.html">http://ais.ucsc.edu/training/Adviser_Training.html</a>	

To date, sixteen academic programs, and all of the colleges, are entering plan changes (Office of the Registrar enters all others). Training documentation is available and users may complete, or repeat, training at any time. Units are encouraged to complete training and to enter Program Plan changes for single majors as soon as possible. A campus update on FYA will be posted at the beginning of the academic year.

#### UCSC Online Undergraduate Advising Center

A new campus web site, *UCSC Undergraduate Advising Center*, <http://advising.ucsc.edu>, is now posted for initial campus comment until July 31, 2005. This site is intended to be an "information clearinghouse" for campus academic advising services, with links for prospective students and their families, enrolled students, staff and faculty. Through the site the user can easily connect to significant campus academic advising information. Further development will include staff access to the Portal that will contain an "advisor's workbench" with links to job related advising tools directed to AIS functions, advising tutorials and an E-Guide for advisers.

#### Central Advising Email Address

The central email address, [advising@ucsc.edu](mailto:advising@ucsc.edu), has been re-established for the UCSC advising community and prospective students (on the Undergraduate Advising Center site) to post advising related questions or to clarify information. Relevant questions will be converted to FAQs on the advising website; the identity of the submitter is confidential. All email will be responded to quickly and, if appropriate, redirected to appropriate units.

#### Training Goals, 2005-06

After the *Academic Advising Training Needs Surveys* are reviewed, the training requirements of

the campus will be evaluated. Surveys received to date strongly suggest that online training tutorials and production of an advising manual are favored. Overall, the primary training need for the coming year is staff access to the Portal; providing users with seamless procedures and access to online training tools.

It is anticipated that the fourth annual Academic Advising Forum will take place on, Tuesday, March 7, 2006. Forum topics under consideration are the advising needs of diverse students, advising probationary students and staff/faculty advising interaction.

### **Campus Acknowledgements**

Members of the campus academic advising community are active contributors to the enhancement of advising practice at UCSC and have organized task forces and committees to address advising and administrative related issues. Additionally, campus advisers ably participate as active committee members on a variety of issues; these contributions to the campus are essential and greatly appreciated.

*ADEPT* (Adviser Development, Education Programs and Training)—organized by and for campus advisers. Sponsors bi-quarterly, campus-wide meetings on advising related topics.

*AIS-Department Solutions Workgroup* (AIS-DSW)—organized by and for departments on AIS related problems and solutions. Staff from AIS, Office of the Registrar and VPDUE office join divisional representatives.

*Council of Academic Preceptors and Preceptors and Friends*—the colleges discuss advising related issues and host bi-quarterly meetings with campus units to confer on campus advising concerns. Debbie Belville, Porter served as chair for 2004-05.

*Department Assistants Group* (DAG) and *Graduate Assistants Group* (GAG)—divisional representatives meet bi-quarterly to discuss administrative and advising related issues.

*First Year Advising (FYA) Task Force*—through extensive consultation the goals and guidelines for FYA were developed. Task force members: Lupe Allen, College Ten, Mary Alvarez, Stevenson, Elaine Kihara, Oakes, Lauren Reed, College 8, Sarah Rogerson, Cowell, Stacey Sketo-Roesner, Kresge and Lynne Wolcott, Stevenson.

*Report Writing Team*—currently learning the intricacies of report writing; Maria Acosta-Smith, Crown, Lupe Allen, College 10, Jan Burroughs, College 8, Tim Guichard, History, JoAnn McFarland, Economics, Mary Spafford, Porter and Lynne Wolcott, Cowell.

New staff will be joining these committees in the next year; these contributions from campus staff are greatly appreciated.