Advising Roundtable Feedback

This is a summary of the whiteboard content from roundtable discussions during fall 2022 Professional Development Day re. Advising Cal Poly Humboldt Students from an Asset-Based Mindset that included three key focus areas:

- Eliminating advising holds to reduce registration barriers
- Increasing access and advising capacity by adding nine additional academic advisors and linking them directly to colleges and departments
- Implementing an advising tool to document advising notes and communications

REMOVING HOLDS

<table>
<thead>
<tr>
<th>PROS</th>
<th>CONS</th>
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<tr>
<td><strong>STUDENTS</strong></td>
<td>Efficient, easy registration, less frustration*</td>
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<td>Autonomy/agency/control*</td>
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<td>Accountability</td>
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<td>Timely enrollment, not waiting on advisor, able to get into classes</td>
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<td>Makes advising a relationship (rather than transactional), eliminating stress and barriers</td>
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<td>Less stress, mental health challenges</td>
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<td>Students wait until the last minute to meet</td>
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<td>Students can get into classes they need earlier</td>
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<td>Hold is punitive</td>
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<td>Summer is hard to get a hold removed</td>
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<td>Good for self-motivated ones and transfers, accelerates transfers</td>
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<td>Asset-based approach</td>
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<td>Enrolling earlier, minimize time on bureaucracy</td>
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<td>Encourages meeting w/advisor earlier, spaced out meetings, more time to talk</td>
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| **ADVISORS** | Time management/saving, less stress/anxiety |
| | Relationship building, PD/mentorship |
| | Skillshops, increases opportunity to teach how to navigate/optimize learning plan |
| | Don’t need to meet w/students who don’t need advising |
| | More campus conversations re. what is advising? |
| | More time with students who need it |
| | Review student schedules ahead of time |
| | Can’t help students who need you the most, familiarize them with policies that may be beneficial. |
| | Harder to check in with students |
| | Potentially fewer students would come in - won’t see the spectrum of students/what will actually help at-risk students |
| *Noted by multiple groups |

Points to consider:
- Removing holds good for most students except 1st semester
- Really about quality advising
COMMUNICATION

Communicating Across Advisors so students have the best experience possible

Consistency
➢ Clarity from a student's perspective re. who to talk to and who has responsibility for specific parts of advising
➢ Inter-advisor communication for consistency in information
➢ Messaging to students from advising team
➢ Uniform, centralized, shared information, notes, alerts, and communication via digital tool

Connection
➢ Connect other support services (e.g. Learning Center, CARE, Financial Aid)
➢ Review of student needs not related to courses and support external factors beyond the classroom
➢ Key people meet and onboard students and follow up with them throughout progress to degree
➢ Draw clear map of options: affinity, faculty, academic advisor
➢ Building relationships so people know key parties involved, faculty ← advisor → student
➢ Individualized attention to student who are vulnerable
➢ Alerts when action is needed by advising team/other advisors (peer advisors, faculty advisors, professional advisors)
➢ Alerts when action is needed by advising team/other advisors (peer advisors, faculty advisors, professional advisors)

Integration
➢ Universal system for faculty and staff with well-defined privacy controls
➢ Documentation by each point of contact
➢ Completely integrated advising platform - all advising info is in one place about a student
➢ Robust training - review student contacts ahead of time, consistent notes and information
➢ Finding ways to integrate professional advisors into department/embedded (department meetings, regular presentations regarding program changes, incorporate advising fellows, in person meetings when there is position turnover)
➢ Synchronous vs. async communication (when to call, chat, email…vs. notes)

Other points to consider
● Privacy considerations (sensitive info) and limits to what different people can view
● Discrepancy between large and small departments. What is fair?
● Acknowledging pain points and agreed up approach to address them
● Define milestones advisors can “check off” (including basic needs milestones)
● Understand the student cycles - macro (academic, career) and micro (semester)
● Academic probation should be prioritized for connecting with students
● Finding university tracking system software that works. Already using: Gmail, Canvas, PeopleSoft, Slate, [mapworks]
● Improve communication systems, keep websites updated, make Canvas tutorials always available
● Academic/faculty advisors’ workload
DIGITAL ADVISING TOOL
Advising team shares centralized information via digital tool

Features

➢ Digital interface; all students’ advisors are visible and connected and emailable, professional advisors monitor and update, one place to do everything
  ○ Whole list of advisees easily found (1 click)
  ○ Advisor would have their own page of caseload
  ○ Able to click on students name with all their info and contacts
➢ Data that reflects real world business processes, set data guidelines and policy
➢ Easy user guide - training, messaging, and PD on tools
➢ Standardized and training in confidentiality
➢ SIMPLE, easy to use, one place to do everything
➢ Visually appealing to-do lists (student-facing and advisor-facing)
➢ Ability to send referrals (CARE, first aid, etc.)
➢ Ability to track and sort case load in real-time*, integrates with PeopleSoft daily/DARS sync
➢ History of success at other schools (research vendors and infrastructure at other universities with high retention)
➢ Shared way of tracking info, mark off: who came in, when, → shared, benchmarks → easily visible
➢ Identifying advising team/updating, and easy referrals to other advisors (not emails)
➢ Notation tool
➢ Early alert system*, mindful human approaches to “alerts”
➢ Chat feature - human
➢ Device-based/app with voice to reduce typing with appointments too, appointments can be scheduled via phones
➢ Easy to navigate visual guide
➢ Students can indicate the topics they want to cover in advising appointment:
  Initial touch points and follow up
  Mental health resources
  My academic plan
  Learning tools and support w/class content
  Financial aid
  Jobs, internships, research
  Housing
➢ In the student center, provide a photo and phone of the advisor and office hours!
➢ Captures student contacts
➢ Automated appointment system includes auto reminder to student and advisor, appointment reminders, changes automated (premium you can book me), connection to Google calendar
➢ Sustainable, reliable enterprise solutions (policy, training, champion) and solutions architect to problem solve
➢ Connected to myHumboldt and SSO with Peoplesoft and Canvas integration
➢ Calendar/scheduling function that shows no-shows
➢ Advisor notes, varying degrees of confidentiality, settings: only me, only user, can be both private or shared
➢ Inter-advisor communication for consistency in information
➢ Predictive analytics
➢ Smart/short/quick responses:
  On track/not
  Academic -- personal
  Milestones
  Know at resource
➢ Student and advisors enter content
Linkedin but one user can actually control
Protect private information and clarity on confidentiality, re: different pieces of information
Way to incentivize student to use - earning rewards with milestones (J-points, bookstore credits)
Student Q&A

Benefits
Advise in a more caring and efficient manner
Ease of use and information sharing for advisors and students
Building relationships (faculty, advisor, students)
Clarity from student’s perspective re. who to talk to and who has responsibility for specific parts of advising
Without breaking confidentiality, keep track of what advisor said
Opportunity for students to provide feedback on advising experience available for all involved in advising
Support external factors beyond classroom, and holistic non-academic advising
Individualized attention to students who are vulnerable
Humane “alerts” based on reliable predictors and events/things
Closes loop on referrals (did student connect)
Pathway - entry → career

Questions
What would make the tool awesome?
Will the tools have a student-facing application?
What is the timeline? Open the floodgates or planned rollout?
Too many platforms?
What is the goal? Which goals are the priorities?
Is PeopleSoft registration cumbersome to students?
Auto-populated available classes?
Integrating instructors’ input
Ability of messaging

*Noted by multiple groups

STRATEGIES FOR IMPLEMENTATION
How do we prepare for the future?

PROGRAM/DEPARTMENT LEVEL
Community building registration events
Meet and greet advisors/advisees “semester welcome as a group” *
Short advisor intro video*
Invite advisors into classes
Integrating advising to lower division syllabi
Integrating information about program level entries across the curriculum
Routinely updating rotation schedules to account for faculty availability
Build into curriculum specific moments in academic cores (junior/senior) to address PTD and professional goals
Golden 4
Faculty specialization and advisor; connections and relationships
➢ Holds for certain programs
➢ Scaffolding for students that teaches the why advising is important
➢ Teach students how to choose appropriate classes
➢ Faculty expectations
➢ Block enrollment
➢ Peer advisor in department
➢ Cohorts
➢ 2x a month communication (email and advising canvas)
➢ Group advising with food
➢ Advisors go to PBLC class and set up meetings

UNIVERSITY LEVEL
➢ Establish a more comprehensive advising program and software for the students to utilize
➢ Case management system
➢ Easier software for pulling reports
➢ Advisors do outreach to set up meetings
➢ Digital interactive advising plan in the student center with pictures and office hours of advisors
➢ Centralized, consistent advising training and tracking system*
➢ Documentation process/system tracking and accountability to contact students who have not registered by a certain time
➢ Reports to advising team of students who have not registered
➢ Counter attack misinformation
➢ Communication of roles between staff and faculty to students - Who is doing what? Simple marketing/shared language
➢ Orientation- enhanced exposure to advising (major/more than academics) - not a firehose
➢ Implement what works on other campuses
➢ Canvas course (similar to wellbeing map course)
➢ Make pathways less complicated
➢ Tracking system for milestones (outreach as needed), student contacts, choices discussed*
➢ “Intrusive” advising (email, phone)
➢ RAMP referrals
➢ Team-based/wrap-around approach
➢ Faculty send alerts to advisor about students (WU, disengagement)
➢ Sci 100-type class for transfers
➢ Publicize culture of holistic advising so students are aware of what they can gain
➢ Targeted help for probationary students
➢ Tracking system (centralized, universal)
➢ Centralized, consistent advising training
➢ Equitable models across college/schools
  ○ Look at demographics in each and PBLC’s
➢ Summer advising sessions
  ○ Including DARS, major maps, during orientation, group/Skillshop advising
➢ Training for advising and holds
➢ Better integration between offices that support students (fin. Aid, academic advising, housing, SDRC, EOPS, etc.)
➢ Targeted holds (advisors can put holds on when necessary)
➢ Policies and procedures
➢ Standardizing Area E PBLC processes
➢ Standardizing advisement timeline and assigned time
➢ Teaching students what an academic advisor is and what they do
➢ Generate short videos to give advising/guidance to students (how to enroll/how to course swap)
➢ Benchmark holds
   ○ Declaration of graduation
   ○ Major change
   ○ GPA
   ○ Freshman and transfer holds
➢ Reward system for meeting with advisors
➢ Advising canvas course with students sharing their stories and offer direction
➢ Use new/different messaging to attract students, better/visible digital info, social media
➢ Show future use of their education

*Noted by multiple groups