

University Academic Advising Executive Council (UAAEC)
Minutes
January 18, 2019

1. Updates

- Face to Face Visit with Dept. Chairs/Supervisors of Advisors
 - Back in November there was discussion about how to get core responsibilities and the annual review rubric out to department heads. Discussed the importance of introducing UAAEC and its' purpose to chairs and supervisors. Terese is planning to go the Chairs and Director's meeting for the College of Arts and Sciences. Sara Ackerson will also attend to talk about advisor training.
 - Plan to share the advisor evaluation checklist as a guide for annual reviews with advisors. CAS provided a list of all supervisors for CAS advisors across all campuses. Seeking to receive something like this from all areas so everything is in one concise document. Meeting with College of Business and Education soon.

- Spring Alive! Paperless Pilot – Jeremy
 - Held debrief meeting and looked at list of students who got enrolled in math and chemistry who hadn't met pre-requisites and found far fewer students than expected. Out of all the students that Jeremy Lessmann checked, every single one was enrolled in a class that was appropriate with one exception, a student who had confused Chem 102 for Comm 102.
 - All of those involved were happy with how it went, especially less paperwork. Decided for Spring Transfer Alive to turn off pre-requisite checking for all courses.
 - It's easy to turn the pre-req check for all courses off, but going in and turning them off course by course requires a lot of time and work.
 - We could turn off the pre-req check for all summer courses but allow departments to opt out. This would not apply to all-first year focus courses, English (due to placement), and foreign language courses.
 - We found advisors were not using advising notes because they didn't have time with back-to-back appointments and other advisors didn't know how to access the advising notes in order to enter information. Advisors had been trained years ago and couldn't remember how to get back into it.
 - There are two different approaches, one will allow advisors to make notes on any student while the route is more limiting and only allows notes to be entered for students assigned to that advisor. Some advisors are not aware of this, and think they can't make notes to students unassigned to them.
 - Advisors want specifics of what to add for notes; are they to be used for every advisor interaction?
 - Suggestion to add a template to notes, to include whether pre-requisite has been verified from another institution or from transfer paperwork.
 - It's more work, but uploading their official transcript to advising notes is valuable
 - Advising notes can utilize the subject line to tell where to go later "AP score coming," or "unofficial transcript checked" etc.
 - Someone asked if there were any students that had been advised as to what class they should take, but decided to make own decision and signed up for something else.
 - Enroll in Chem 105 instead of Chem 103. They score into 105, but it's not clear to them that Chem 103 is not a pre-requisite.
 - The main goal is to help students check out of advising without feeling like they are being run through a gauntlet. The second goal is to ease the manual process on advisors filling out paper.

- WSU Academic Advisor Career Ladder (see attachment)
 - Working with HRS, asked them to make sure it's something that was spread among all those involved with hiring in our colleges so everyone is aware of advising career ladder.

- Admissions Imaging Change – Waylon & Terese
 - The change will impact e-docs and advisors' ability to look up high school transcripts.
 - Over a year ago there was training for advisors, thinking it would happen in 3 or 4 months but the roll out was delayed.
 - It will come as a surprise to advisors that aren't on the imaging users email list.
 - Beginning Tuesday the logins go to the new Oracle system, but no new information will be put into e-docs.
 - Manual will be sent out to their list and we will make it a point to send it to everyone else and schedule some training.
 - Communicate that it's new and that if advisors need in-person training, open lab hours in IT will be offered.
 - Student Financial Services is currently using the tool, claims it is an adjustment but it is a better system.
 - Advisors not currently using e-docs/imaging will need to put in request to gain access.
 - The change will be added to the 411 site.

Discussion

1. Policy barriers to student progress

The Provost's office, specifically Dr. Austin, is asking for feedback or examples of University policies or procedures that cause barriers for student to their progress and success.

Holds/Services Indicators are a problem.

- Offices who place holds must have a way for the student to get the hold removed in a timely manner (immediately or up to a few hours); There needs to be more than one person in an office that can remove the hold so students are not held up because someone is out sick or on vacation.
- If the University is open, office who place holds need to be open from 8 a.m. to 5 p.m. including the lunch hour, so students can resolve the hold. Students have come to the office to face a sign on the door saying they are closed (e.g., Writing Programs closed at 2:30 p.m. before winter break).
- To the extent possible, holds should be put on at the same time of the semester for the up-coming term. Some holds are put on in the 6th week while others are placed in the 10th week or beyond. Advisors can't help talk students through unfinished business if the hold is placed on after students have met with their advisor for the semester. There is no standard time for placing holds.

Student Accounts Hold

- Holds for students who owe money; We need to raise the minimum balance for students who owe money so they are not held from registering for classes at a minimum of \$200; consider raising the bar to \$500 or higher if possible.
- Send out notifications to parents, who often pay the bills, who have 3rd party access a reminder of when bills are due or a statement that there is a charge on the student account.
- Make it easier for students to get permission.

Housing Hold

- Transfer students going through Spring Alive! (January) didn't have final transcripts in yet to WSU that showed they had enough credits to not be held to the freshmen live-in rule through university housing.
- During orientation programs, students can complete/sign a promissory note online and once submitted, the hold is immediately lifted. After an orientation program ends, that form isn't available and students need to go to the housing office to resolve the hold.
- Students have had issues with housing only having one person in the entire office who can lift hold. This happened on the first day of classes in January; the student was told on a Tuesday, that the person who lifts the hold was on vacation until Friday and they would need to come back then. This prevented the student from registering into classes and therefore attending them in the first week. This is an unacceptable answer. If we put a hold on, we have to have a way to lift the hold when a student takes the appropriate action to get it removed.
- The bigger issue is that there are exceptions that rely on one person or a manual process that needs to be automated.
- Some students have housing holds and with a phone call, can get a 12 hour reprieve. If all they have to do is call to get it lifted, why is the hold there in the first place? Display a message the student must read and click that they have read it and understand their responsibility. Once the student has read, clicked, and submitted the hold should lift automatically. Housing views this as no big deal, just call the department to get the hold lifted. It is a big deal to the student during a very stressful time.

E-CHUG Holds

- Every semester there is a problem with students who watch the video, answer questions, and submit their work only to continue to see the hold in MyWSU preventing them from registering. Students commonly report this to their advisor. Some students complete the task more than once to no avail; the hold is still on preventing timely registration.

Student Accounts & Housing Account

- The student/parent views financial accounts as one account, not two separate financial accounts, one for housing & dining and one for tuition and fees.
- There is a need to re-examine the time frame of holds – how long has it been on? Does the hold have to kick in when a small amount (less than \$250) has been due for 30+ days. Example: The Sports Pass is \$239, but if it's 30 or more days overdue, then there is a hold placed preventing registration.
- Students who can't enroll because they have a past due balance should be provided an opportunity to set up a payment plan.

Writing Portfolio Hold

- Transfer students have a hard time with the Writing Portfolio (WP) hold because based on the number of credits they transfer in with, they are expected to complete the Jr. Writing Portfolio in their first semester. Students are informed about the WP during their Alive! session, but they are taking in so much information throughout the 2 day program, it's hard to retain everything.
 - Can we wait until the second term before a WP holds goes on for transfer students? If a student enrolls for Fall (August start), give them until April to get the Jr. Writing Portfolio done.
 - Freshmen who have enough running start credits get surprised by this too. They come in with 60 credits and have to do the portfolio without any work/papers created at WSU.
- Can WP holds be put on earlier in the semester? They currently come on two weeks before advising holds. This would allow more time for students to plan by knowing it is coming.

- Is it possible to get a notice that there is a WP requirement coming up? We don't want to stop students from enrolling, just inform them that the requirement exists so they have some lead time.

Writing Programs/Portfolio practices are a huge barrier for students.

- Writing Programs needs to have a way for students to upload their documents electronically. This is 2019 and students should be able to complete the WP on-line. Most courses ask students to turn their work/papers in electronically yet the Writing Programs office will not. The process needs to be paperless as for many students, submitting an original document is an issue – especially for global campus students.
 - Global campus advisors have had several conversations with Writing Programs who require global students to submit their writing samples in a specific sized envelope which has to be mailed to the Pullman campus. No progress has been made to change this practice.
 - Times are changing and WP needs to change with it.
 - All WSU campuses are frustrated with the unwillingness to move to an electronic submission process.
- WP Review Process. The student doesn't get any feedback unless both parts of the WP process have been completed. If a student submits their 3 papers, they won't hear anything on the papers until after they have completed the timed writing and vice versa. Students want feedback on both parts submitted, not having to wait for part II.
- The Writing Programs office is frequently closed early before break periods (e.g. Thanksgiving break, Winter break, Spring break). There are times in the summer when the office is closed during lunch time too. This is a barrier for students who drive into Pullman/campus to turn in their papers/packet.
 - Advisors gave more than one example of students being unable to submit their WP packet of papers in December before the University closes for winter break causing students to have to wait until January to get the hold removed; this delays students course registration for Spring Semester and students could be closed out of a course because seats filled before they could enroll.
- Get faculty and instructors in the practice of handing back papers with a recommendation to the student that they submit the paper for the writing portfolio.

Course Repeats

- Only allowing one repeat can sometimes be a barrier. Some departments won't allow a student to take a course for a third time; this causes students to leave WSU and go to other schools
- Summer only repeat policy for third repeat is a huge barrier. Not all students can stay in Pullman to repeat a course in the summer. They have jobs or other commitments at home.
- Some departments only allow repeats in the summer and then don't offer the course in the summer.
- Advisors report that students in STEM can't repeat Chem 105 or calculus courses. This isn't widely known; raise awareness.
- All departments and units need to be on the same page with repeat policies.

FAFSA Verification

- Verification is intimidating, students see it as a soft denial – especially non-traditional students/global students.

Paying for Summer Session out-of-pocket

- Some students can't afford to pay for summer school out-of-pocket because financial aid is part of their past year's award. Is there any way around this being applied to the prior year versus the Fall Semester?

External scholarship loading

- University Receivables has hard time keeping up with scholarship checks that come in for students. The number of external scholarships has grown substantially and students want access to the funds immediately. If a student walks up to the counter to pay cash or write a check for tuition, it is processed while they wait and posted to their student account the same day. If the student walks up to the counter to turn in a scholarship check they were given, it isn't processed the same day and can take 2 weeks or more to be processed and/or posted to the student's account. Students are contacting the outside agency about the funds only to be told they mailed it to the University already.
- University Receivables needs more staff assistance to process checks and/or they need more than an access database to track scholarship checks. Automate this process so funds can reach the student in a timely manner.

Reapplication Fee for Global Students

- Global campus students have issues when they lose admission eligibility and have to pay \$25 to reapply for Admission to WSU. Global students are often adult-students working full time or have other obligations (e.g., family). It is hard to maintain consecutive enrollment and having to reapply for admission, paying \$25 each time, is a frustration for many.

WSU Scholarships/Awards

- Students rely on knowing their financial aid package in June or July to determine if they can afford to attend the upcoming semester in August. Students aren't notified until September (this year Sept. 5) that they were given another scholarship which is too late if they have already decided not to return for the semester.
 - Could there be notification to the student in late July that says, all of the University's scholarship monies have been awarded and there will be no scholarships applied to a student's aid package late?

Study Abroad classes

- Within schedule of classes, Pullman based study abroad courses show up to all Pullman students who think they can enroll in it (e.g. Marketing 360). They have to dig through multiple screens to find out that the course is not physically in Pullman. We need to find a way for these study abroad classes not to show up under the Pullman course list.

2. Early Academic Referrals System (See Attached)

- Email going out to faculty and instructors about new system that is academically based. Right now they have aware system for students concerned with health.
- EARS-part of Navigate online platform. Faculty will be able to go on Navigate and do this. Case manager Todd Mordhorst makes sure referral goes through to tutoring or advising.
- Do whatever we can to spread the word to advisors following the provost's announcement. Something should be sent out on the listserv to avoid any discontent that people weren't notified.
- It is expectation that if referral comes, that advisors takes action to follow up. This might surprise some advisors as an additional duty.
- Added to ACG Meetings Agenda.

- Vancouver started the referral system in May and fully launched it in the fall. It goes to their student resource center for triage and they see a lot of financial aid issues or reports of students who stop going to class and won't respond to the instructor by phone or email.

3. UAAEC Working Groups-

-We need to develop work groups made up of UAAEC members and other interested stakeholders. A member of UAAEC will be the designated lead of each group.

- MyWSU Academic Planner (aka – 4 year plan) Pilot-interactive with student and advisor so student knows what tools they need to use and can see four-year plan laid out.
- Training Program for Students to teach the academic tools they should use. Must have students in on this process to know what they need instruction on such as transfer credit reports, What-If reports, Academic Requirements, etc
 - Students are conditioned to use Blackboard for class, so they do not turn to myWSU to check their final grades and are missing out on their deficiency status. Is it possible to include a notification in blackboard to turn to myWSU for final grades?
 - Had a script created for training videos, but ASWSU lost their funding. Looking to create videos using Zoom and old scripts.
- University wide adoption of MyWSU Advising Notes
 - Helps when transferring students from department to department. Identify someone in UAAEC and branch out to see who else should be involved in conversations.
 - Make sure all of these are campus wide, system wide all branch campuses

Next Meeting: February 15, 2019; 12:30 – 2:00 p.m.

Future Spring Meetings:

- March 22, 2019; 12:30 – 2:00 p.m.
- April 19, 2019; 12:30 – 2:00 p.m.
- May 17, 2019; 12:30 – 2:00 p.m.

Meeting Date: 1/18/2019

ATTENDANCE

NAME	TITLE	ORGANIZATION	PRESENT
<u>Committee Members</u>			
Ackerson, Sara	ACADA President	ASCC	Yes
Bond, Robin	Clinical Associate Professor	Honors	No
Canty, June	Associate Vice Chancellor	Academic Affairs WSU Vancouver	Yes
Dixon, Brian	Assistant Vice President	Student Financial Services	Yes
Fillinger, Bailey	Staff Assistant	ASWSU	Yes
Gizerian, Samantha	Clinical Assistant Professor	Integrative Physiology & Neuro	Yes
King, Terese	Director	ASCC	Yes
Lessmann, Jeremy	Clinical Assistant Professor	Chemistry	Yes

McAteer, Kathleen	Assistant Vice Chancellor	WSU Tri-cities	No
Morgan, Amanda	Associate Director	New Student Programs	No
O'Donnell, Debbie	Director	Global Campus	Yes
Pressley, Shelley	Associate Dean,	Voiland	Yes
Ryan, Ruth	Associate Director	ASCC	Yes
Safranski, Waylon	Assistant Director	Transfer Resource Center	Yes
Scourey, Joy	Senior Associate Director	Student Financial Services	Yes
Stout, Sara	Director of Student Services	Program in Communication	Yes
Wack, Mary	Vice Provost for Undergrad Education	Office Undergraduate Education	No
Walter, Jon	Admin Planning Specialist	Institutional Research	Yes
Wehrung, Nancy	Senior Associate Director	Admissions	no
Yocum, Darren M	Executive Director	Enterprise Systems	Yes
Zimmerman, Matt	Registrar	Registrar's Office	Yes

Attachments

Washington State University Academic Advisor Career Ladder

The University Academic Advising Executive Council (UAAEC) and Advising Consultant Group (ACG), in conjunction with the advising community at Washington State University, seek to develop and sustain a high quality-advising program that supports student success and achievement and aligns with the University goal of a Transformative Student Experience. To that end, a path to promote and retain our best and most experienced academic advisors is critical. By developing rigorous standards, expectations, and using an appropriate annual evaluation process, we will emphasize and expand the quality advising practice, behaviors, and values that we desire all advisors to demonstrate.

In establishing a promotion structure for academic advisors, the goals are to:

- Retain a core group of the most qualified advisors to sustain and advance quality advising in each college and advising unit across WSU
- Reward those advisors who contribute to the professionalism, development, and implementation of effective advising practices
- Develop a cadre of advisors who will provide leadership for new initiatives
- Recognize and promote professional advising practices that improve the quality of the undergraduate educational experience
- Develop a cadre of experienced advisors to serve as resources and mentors for newer advisors
- Advance practices that support WSU Core Advising Responsibilities

New Hires

New academic advisors (Academic Coordinator/Advisor or Student Services Coordinator/Advisor) are hired at the level and salary range determined by the department/college and within HRS recommended guidelines based on:

- Qualifications
- Prior undergraduate advising experience
- WSU experience
- College/department need

New academic advisors will have extensive University and departmental training opportunities and assume a student caseload appropriate to the advisor's skill level.

NOTE: Specific duties of academic advisor are based on university advisor position description, University Core Advising Responsibilities, and the needs of the department.

Career Ladder Guidelines

1. While all academic advisors are expected to meet or exceed advising standards set forth in the evaluation process, the choice to seek promotion is best when based on mutual agreement between the supervisor and employee.
2. Supervisors/Managers will work with their appointing authority to develop unit-specific criteria that meets the needs of the department/college, closely follows the criteria set forth in this document and the *WSU Core Advisor Responsibilities*, and enables advisor promotion within the advising classifications below. Additional guidance for advising standards can be found in the *Advisor Evaluation for Chairs/Directors*.
 - a. Each department or college will establish and publish a process for review of promotion materials that closely follows the criteria and timelines set forth in this document.
3. Within each title code there are opportunities to grow and advance in responsibilities within that university classification; if applicable and funding is available, there may be opportunities for salary increases within that classification.
4. Determination of eligibility for promotion and development of the promotion materials is the responsibility of the employee in collaboration with the supervisor/manager. See page 2 for requirements.
5. Submission and review of promotion materials are to be received by the appointing authority by January 31st or June 30th, depending on college-determined timing of the promotion process.

Promotion Levels (Academic Coordinator/Advisor 1, 2, 3; Student Services Coordinator/Advisor 1, 2, 3)*:

- *Academic Advisor 1*: Entry level positions with designated areas of responsibility and job knowledge
 - One promotion level within the Advisor 1 classification
- *Academic Advisor 2*: Increased levels of advising responsibility and job knowledge or newly designated responsibility in advising
 - One promotion level to Academic Advisor Senior (this is a working title change within the classification)
- *Academic Advisor 3*: Increased areas of advising responsibility and leadership within college or unit, leadership in university academic advising initiatives, may include supervision.

*In accordance with BPPM 60.12 [and within the following reasons: significant changes in duties; retention (difficulty retaining, etc;) extraordinary merit; and internal or external equity and/or market conditions], contingent on satisfactory performance and available funding, the advisor's department may increase the salary to the mid-range of the HRS recommended salary range or by a reasonable percentage depending on the initial salary at time of hire (typically not to exceed 10%). This recognizes the advisor's performance with advising practice, advising knowledge, and professional engagement within the advising unit and the University advising community.

[New Hires] Promotion Option: After second year and/or no later than start of third year

At the advisor's **second full-year annual review**, supervisors/managers will evaluate the performance of the advisor and the needs of the unit/college, to determine if a promotion within the current title/level or if a title/level change is applicable. Promotion will be based on performance criteria, advisor self-evaluation, and preparedness to accept higher-level additional responsibilities. If the promotion is approved, it may be accompanied by:

- An increase in pay depending on available funding, funded travel to a conference, or other professional development opportunities
- Assignment of additional projects/responsibilities requiring higher-level knowledge
- A change in working title, reflective of new responsibilities

[Current Advisors] Promotion Option: After fourth year

At the **fourth full-year annual review**, supervisors/managers will evaluate the performance of the advisor and the needs of the unit/college to determine if a promotion within the current title or a title change is applicable. Promotion will be based on performance criteria, advisor self-evaluation and, preparedness to accept higher-level additional responsibilities. If the request is approved, promotion may be accompanied by:

- An increase in pay depending on available funding, or financial support for travel to a conference, or other professional development opportunities
- Assignment of additional projects/responsibilities requiring higher-level knowledge, on-going coordination of academic success programs, and/or supervision of student staff
- A change in working title, reflective of new responsibilities

Request for Promotion required materials (see BPPM 60.12):

1. Current resume or curriculum vitae
2. Statement from advisor of why promotion is sought, how they meet the standards and responsibilities of an advanced advisor position, a completed self-evaluation rubric, and confirmed eligibility by supervisor.
 - a. Supporting documentation may be included (i.e., letters of support from students; results from most recent student satisfaction survey; feedback from student exit surveys; departmental advising assessments; awards received)
 - b. Examples of additional criteria may include innovation in advising practice, research in academic advising, completion of an advanced degree, participation in regional/national advising association
 - c. If salary increase is requested – supervisor must include a summary of salary increase amount (see HRS guidelines above for salary increase) and justification
3. Copy of updated position description
4. Organizational chart supplied by supervisor/manager showing the advisor's position's relationship to other positions within the unit