Open Forum Attendees:

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<th>Name</th>
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<tr>
<td>Jason Kantrowitz</td>
<td>Demetria Anderson</td>
<td>Clare Faurote</td>
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<td>Lexy Payne</td>
<td>Jessica Ward</td>
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<td>Brennan O’ Lena</td>
<td>Charisse Sekyi</td>
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<td>Sarah Terry</td>
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<td>Andrea Azarian</td>
<td>Triena Bodart</td>
<td>Tobias Deutsch</td>
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<td>Kristin Roosevelt</td>
<td>Jim Schmidt</td>
<td>Susan Caskin</td>
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<td>Linda Huang</td>
<td>Jen Hayes</td>
<td>Tammy Badura</td>
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<td>Katherine Finegan</td>
<td>Olivia Navarro</td>
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<td>Matt Crouse</td>
<td>Jean Salzer</td>
<td>Jeremy Page</td>
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<td>Rachel Amick</td>
<td>Mary Moore- Geissler</td>
<td>Ashlie Schaffner</td>
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<td>Lori Sieckert</td>
<td>Staci Bley</td>
<td>Tina Current</td>
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<td>Jennifer Hack</td>
<td>Colin Daly</td>
<td>Jennie Klumpp</td>
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<td>Gwyn Wallander</td>
<td>Aggie Northrup</td>
<td>Lindsay McHenry</td>
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<td>Michele Fero</td>
<td>Sharon Kaempfer</td>
<td>Shannon M. Byrne Irwin</td>
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<td>Julia E Bonner</td>
<td>Kate Masshardt</td>
<td>Cary Miller</td>
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<td>Ian Mclaughlin</td>
<td>Pam Schoessling</td>
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<td>Nicole Heinen</td>
<td>James Hardy</td>
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<td>Meghan White</td>
<td>Alejandra Lopez</td>
<td>Ruth Russell</td>
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<td>Tiffany Martin</td>
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Theme: Communication Facilitator: Rodney Swain

Discussion Summary:

- “Best thing that ever happened was creation of ASALC.”
- Advisors can make referrals to other academic advisors, PASS, Career Development Center, Financial Aid, Library, etc.
- No way for advisors to adequately communicate with faculty except through email.
- Advisors can make referrals through MapWorks or the Student Success Collaborative.
- “AAPC has become too large and as a consequence engages in less discussion.”
- Same is true for Student Recruitment Advisory Committee.
- Programs that advisors use are not being used by faculty.
- MapWorks is more for first year and transfer students.
- Student Success Collaborative won’t accept data until student enrolls.
- Is there a way to routinely generate and update lists of intended majors (including email reflectors)?
- Availability of academic advisors during peak times is a challenge for students. Solutions: walk-ins, text messages, APP?
- Get schedule of classes to advisors sooner. Share information about sabbaticals, professor changes, changes to program focus, etc.
- How can faculty contact professional advisors?
- The best communication between individuals occurs when relationships are formed.
- Mentor program for advisors (of all types) would be good.
• No shared note system between schools and colleges.
• Schools not using all of the same tools. Tools generally don’t cover all students.
• Faculty should be given access to the Student Success Collaborative.
• We must all be respectful of each other.
• Create culture of exchange between faculty and advisors.
• We react. We need to be proactive.
• 22. How do we provide “need to know” information (e.g., program changes)? Website?

Theme: Consistency of student experience
Facilitator: Angie Sadowsky

Discussion Summary:
Ongoing: Enhancing Advising & ASLAC working together on consistent document for appeal form (similar form, understanding that each S/C will need individual flexibility)

Training – from S/C to other offices and back
• From other offices such as Financial Aid (fees/adds/drops, appeals, other forms) so these messages are consistent to us which will trickle down to students
• Students going to other resources on campus for guidance too – “I’ve been sent to different people every semester” – how can we help other units (Housing, FA, PASS, etc.) understand what each S/C does – who do I go to, communication, bounce around, dissatisfaction

Advising Syllabus/Expectations/Learning Outcomes
• Making the “what to ask” or prep for your meeting documents more available to students, they don’t know what they don’t know, keeps some students in the dark for too many semesters, too little too late

Mandate advising for all first year students
• Set expectations and recommendation standards across campus – milestones
• *What does that look like for some S/C with major case load issues? Group advising sessions? Push for all new students to get in during October – Advising Month?

Case load
• So drastically different, turnover, coming from top-down (shouldn’t be dumped on someone else)
• Sometimes roles are seen as more administrative/secretary, don’t have time to address other issues, constant triage – don’t have the luxury to get into relationship building, coaching, goal planning, etc.

PAWS usage & access, office procedures, tools used, message heard when they walk in, know what they’re going to get and know how to read it

Accountability (once you get TRAINING, ACN handbook, pro dev, etc.) mentoring program? How do different S/C see advising – titles/roles – faculty and professional, recognition, expectations, who does what across campus

Feedback from students – ask, report back, measurements, assessments – need information for our job (do better work day by day) but also for Deans/Admin to make decisions/allocate resources

Walk-ins, repeat policy, declaring a major... in some regards, these things have gotten better, but S/C need to have feet held to the fire – why are we doing what we’re doing, is it for our ease or for student services

Relationship from orientation to graduation – satisfaction, retention, persistence = student success, same people working with same people – do we know numbers/data behind this or is this just the way it’s been done

Faculty advising
- Make connections vs assigning majors (L&S style) – is this a best practice or are we doing this because that’s the way it’s always been done? What does the data show?
- All get sent to the “good ones” who will meet with students, engage them, then those people are overloaded but student has good experience

**Email advising** – what should we share? FERPA – UWM email? Policy across the board? Online classes vs. convenience; why aren’t all offices on board with this?

**From Student Affairs** - no different housing contract – no matter where you live, there are all under the same rules... can some of this be applied to academic affairs in policy and procedure?

- **MC centers/identity based advising**
  Seems it’s really only part of L&S student experience, let’s looks at the numbers... does it pay to keep these offices and assign advisors this way?
- Couldn’t these lines/advisors be mixed in with other L&S advisors to bring everyone’s case load closer to ideal? Not so much run around, easier student transitions & procedures, training/communication issues
- We’re trying to be so inclusive in other terms but not here, why is this still the practice?
- Don’t we want students getting the benefit of “working with people who don’t look, sound like me” – more diverse offices across campus, not specifically calling out these populations (again, look at the numbers/data, are we doing this as a best practice/in students’ best interests or just because that’s how it’s always been done?)

**Electronic vs paper!**
- Tools – shouldn’t have paper scorecards/progress reports
- use PAWS, SSC, ways we can all work smarter

**Theme:** **Defining the role(s) of advisors**

**Facilitator:** Louis Molina & Rob Smith

**Discussion Summary:**
- **Jacks/Janes of All Trades**
- Roles vary across Schools, Colleges, departments, units...etc.
- Academic Advice is but one part of the roles/tasks advisers play
- Professional Academic Advisers serve as:
  - mentors
  - referral source
  - navigator through collegiate experience
  - programmer/event coordinator
  - administrators - very wide range of duties
  - community outreach - particularly with diverse constituencies
  - personal support mechanism/mediator - when addressing students' personal needs, these often immediately trump academic needs, and seemed to weigh heavily on all of the advisers who discussed this
- **Faculty Advisers**
  - provide advice on courses in major
  - provide professional development, particularly with graduate students
  - prefer to have contact with students earlier in their collegiate career, even before declaring majors
  - should not replace professional advisers, but want more communication with them

**Consistent Themes regarding roles**
Work Group for Undergraduate Advising (WGUA)
Open Forum Summary

- Academic Advisors role is dynamic from school to school, from office to office and position to position. While there are many things all advisors might be responsible for, there are many other roles/duties that advisors across campus perform (recruit, scholarship coordinator, Hyperion Report Runner, Event Planner etc.). “Advisors wear many hats”.
- The title advisor is widely used on campus.
- Academic Advisors are advocates for students.
- Advisors are the first point of contact for most continuing students (and many prospective students).
- Academic advisors help students define and develop realistic educational plans related to abilities and interests
- Academic Advisors help students plan for the coming semester and to review/revise long range academic plans and goals. Academic advisors assist in this process by helping to identify and access alternatives and the potential consequences of decisions
- Monitor progress toward educational/career goals.
- Interpret institutional policies, procedures, and requirements.
- Inform and refer students to other institutional resources when academic or other personal problems require intervention by other professionals. (ARC, Career Dev, Norris, Pass etc.).

Other Topics/Conversations
- Disconnect between Campus Administrators and Advising on campus. Administrators looking at “numbers” and “rates” for bottom line. Alternatively, advisors might suggest a student stop out of school or even transfer... based on the details of the student scenario and in the best interest of the student. (graduation rates vs nontraditional students and retention rates vs access institution, budget model)
- “What are advisors not?” Discussion was about situations academic advisors find themselves in when meeting with students. Some examples are mental health professionals and social workers. So it is important to have appropriate training on handling situations that arise.

Theme: Advising tools and training
Facilitator: Brian Hinshaw

Discussion Summary:

Advising Tools:
- Enhancing Advising is planning survey on technology for advisors over the summer. Would it make sense to review (as in an RFP process) different vendors (those currently available, or other vendors) for notes functions?
- Desire to have a comprehensive system for electronic notes. Some issues: Collaborative notes may not include postbacc or 1st semester freshmen. PAWS has more comprehensive reach, but how to store notes on prospective students? Hobson’s for pre-enrollment notes – can these systems talk?
- Are “PAWS Notes” available? Yes, but requires set-up, testing, and documentation – Registrar’s waiting on campus decision/direction for notes before implementing.
- Would PAWS or Collaborative notes allow uploads?
- Some advisors felt Mapworks too cumbersome – essentially leaving it to Housing and mentors. Student Success Center sends out early alert notices, so advisors use those rather than logging into Mapworks. In re: notes, Mapworks is not always available – only useable during fall spring terms and loading times are slow, regular purges of past data. Do Mapworks notes disappear?
Work Group for Undergraduate Advising (WGUA)
Open Forum Summary

- Collaborative seen as very useful with certain students, particularly major matcher functions, but these don’t seem reliable yet as some majors/areas haven’t been fully coded/reviewed. Hope that it will be more useful as more utilize the system.
- A note system that could utilize referrals would be helpful, so that students don’t have to “retell their story” at multiple offices.
- Univ of Minn built their own home-grown notes/calendaring/referral system that interfaces with their SIS. Could UWM take that route?
- Should we have a standardized “intake” form for meeting with students, so that referrals can be clearer to both student and advisor? Rather than relying on student-as-messenger or emails across campus, the intake form could have a routing process

Advisor Training:
- Advisors need more training relative to systems and focused on UWM practices, i.e. training customized to address UWM issues/challenges.
- UWM has no campus-wide system of on-boarding new advisors. May be worthwhile to have a formalized (or semi-formalized) advisor orientation that would introduce campus partners and provide cross-campus information. Perhaps a list of a staff member in each area that might be staff willing to be a point of contact to new advisors. Using ACN's online resources as a start, could the ACN website provide this campus overview? Or a shared manual via One-Drive, editable by campus departments? Interest in a “best practices” document which might help streamline inconsistent application of policies. A “new advisor” course on D2L – but who oversees, organizes?
- SUNY has a semester-long hour-per-week course for new advisors, taught collectively by several offices across campus (Norris Health one week, Registrars Office next week, etc.) New advisors were expected to make this part of their workweek.
- Financial Aid felt that it would be useful to do group trainings with advisors, particularly since information changes so often that the training need is broader than a one-time “orientation.” Maybe a yearly workshop for advisors on new/revised initiatives from Fin Aid, Registrar, professional development. Is it possible to have access to a “demo” or “dummy” student in live PAWS for training purposes?
- Should advisors be cross-trained to be able to provide more campus services to students? No, FERPA and ever-changing rules (e.g., Fin Aid) really require passing students along to other offices, even if students don’t like it. Students benefit from learning how to self-advocate, meet their needs across a dispersed campus.
- Housing gets a fair amount of “advising” questions, particularly when students don’t feel they connect with their assigned advisor. Is there a process of changing advisors in those instances?

Theme: What is a success coach? Facilitator: Robin Jens
Discussion Summary:

Question 1—Advisors commented on uniting responsibilities of SC in AA sessions. Given the description on the handout—do you see similarities in our AA on campus?
Lubar—first year seminar course, academic program and unite Mapworks information
AOC—combine content and skills development, see student monthly, one-on-one counseling, identifying concerns and uniting students with resources
Multicultural offices—combine in both SC/AA, if students on probation—meet monthly, otherwise see each semester
L&S—all discussed in advising sessions, “tracking class materials and keep track of students materials”
Housing—success coaching using Mapworks, refer to academic advisors—academic issues, but address skills and match to resources, professional staff meets with red, redX2, other staff (student) talk about yellow/green areas, students do not expect to ask—so it can be more effective since it unites where they live with why they are here

Yes...some, but don’t have the time to incorporate all areas of SC, time limits much of SC to take place
Education—have with students, but time limit, students need to follow-up but not many do
Student Success Coaching happening in SSCenter, but do not touch academic advising
PASS—academic coaching—grad students from higher education on time, skill, test-taking, note-taking, skills necessary for attending course
Norris—overlap—students find this confusing—counselors routine, problem solving, test anxiety, with limited resources—how do we determine effectiveness—need to continue those things that work and not continue those things that aren’t proven effective.
Not enough funding or resources—small pockets of things happening on campus—good thing or not so good thing
Education—advising as teaching, would need no more than 100 students with less responsibilities, admin work, time intensive
L&S—Not every student needs this—coordinate resources to allow students to have access to these type of resources, Not every student comfortable seeking out these resources.
Flow chart of resources—point of contact. Allow student to know where to start. MapWorks identifies this for students.

Education—do this with students in AA, should be happening in multiple places, if we only did AA only listed on handout—then missing coaching role—not done in one shot—but may happen over the course of a students timeline, most professionals have training in success coach skill building
Counseling Center—positive daily routines, don’t understand how AA can do all of this, nor are they qualified to do all of this—

Question 2—Is there value in having SC for UWM students?
Yes...housing unique experience in talking with students where they live
Yes, but very time consuming when done well. Try to do both. Limits on what SC broach. Need to be certified counselor.
Athletics—mentors that work with student athletes, Grad Assistants that work with SC areas—peer, part of the group—very successful. Relationship very important.
Yes.

Question 3—Should this role be separate from AA?
Housing—dependent on particular person, all academic advisors may not have that same skill set, good for student experience—give them as much support as they need to succeed
OR—add more advisors so they have time do work with students in the fullest
Library—students don’t see advisors—don’t add SC, one more person they will not see
Perhaps more targeted
Layers of communication between SC/AA—confusing for students
If not combined—then much less blurred between two roles—better definition
Don’t think parcel out 100%, but value in having another person working through skill building issues with students. Give to people who specialize in this area.

Question 5—How could we establish a SC without replicating responsibilities AA? Could this be confusing for students?
Yes, confusing. Imbedded into other services. There are a number of resources available. Perhaps identifying current services.
CIE—specialize form of advising—immigration advising.

How much time spent building skills for students?
Varies depending on student. Schedule additional time with students in need or identify lack of success skills.
Students can’t focus on being successful academically—if other issues impede their success.

Question 6—what other areas should the work group explore as it pertains to Success Coaching?
Advising student in other areas where/when they may not get into their desired major/school/college

Theme: Undecided student experience Facilitator: Jennifer DeRoche

Discussion Summary:

• Extensive discussion regarding the variety of undecided students. Identified groups included:
  Students with no plan or direction for education and/or career.
  Students admitted to a professional school/college who are uncertain of major track (i.e. admitted to Engineering and know they want to be engineers, but not sure if they want Mechanical, Civil, etc.).
  Students NOT admitted to professional school and instead admitted to L&S, but who know what they want their major to be (i.e. in L&S but want Nursing).
  Students who have a planned major but don’t know what they want to do for a career.
  Students who have a specific career goal but are not sure which academic path will best prepare them for their desired career.
  Students who entered UWM with a planned major/career path but have either changed their minds and are now undecided, or could not be admitted to desired program.

• A common point made in this conversation is that when we focus on undecided students, we should not limit the focus to first year students as there are undecided students across all areas of UWM and all of them require services (freshmen, transfer, continuing students, Honors students, developmental students, etc.).

• Advisors in professional schools/colleges (i.e. Engineering, Health Science) felt strongly that undecided students in professional programs should stay in those programs. For example, if a student knows she wants to be an engineer but isn’t sure which kind of an engineer, she is best served by CEAS advisors, not general advisors for a variety of undecided students.

• Advisors shared experiences at previous institutions where a “University College” took in ALL first year students or undecided first year students. Advantages and disadvantages were discussed. Advantages included the kind of programming University College could coordinate
There was discussion of **curricular components** that can support undecided students. Current Educational Psychology offerings at UWM were discussed. Some advisors felt that making these courses three-credit GER courses would make them more attractive to students. Other advisors pointed out that in high credit majors with very few GERs (i.e. Engineering) there isn’t much room for these courses one way or the other. There was some discussion regarding whether or not these courses should be mandatory. Additional discussion revolved around University 101/First Year Seminar style courses that could provide supports bridging academic success skills and choosing a major/career.

- A suggestion was made that we should look at options expanding the discussion beyond major/career planning to a broader **“Life Design” concept**. Courses for credit and/or non-credit workshops could engage students in planning what they want their life to look like and how their education and career choices shape their lives.

- There was discussion about establishing **university-wide thresholds for declaring a major** and specific advising interventions for students who remain undecided. Different credit levels discussed included 30, 45, and 60; currently the College of Health Sciences places a hold on undecided students once they reach 30 credits. At the mandatory advising meeting, students are either moved into their major of choice if they have decided (making it “official” on PAWS), or they are educated about the importance of completing their decision-making process in terms of degree progress and they are referred to counselors in the Career Planning and Resource Center.

- As we discussed referrals to the Career Planning and Resource Center as well as other areas on campus, it was noted that **referrals to offices are not as effective as referrals to specific individuals**. Students are less likely to follow through when an advisor says, “Make an appointment at the CPRC” instead of “Contact Lauren Lessac at the CPRC to schedule a meeting. Here is her email address and direct phone number.” In an ideal work, advisors would be able to set up referral appointments for a student and then be able to track whether or not students showed up for these meetings. The discussion about referrals also highlighted that advisors cannot possibly know everything and do not always have time to cover all areas of concern, so to truly help undecided students resources and referrals need to be better coordinated.
Work Group for Undergraduate Advising (WGUA)
Open Forum Summary

- There is overlap between academic advising and career advising, there is a need for them to overlap
  - There is shared / diffused responsibility
- Not all academic advisors have the training, resources, capacity and/or time with students to do career advising due to demands on their time e.g. caseloads (no one standard will for all advisors)
- Reciprocal communication is necessary between career and academic advising; strategic referrals are a must
  - What if there were technologies which would allow advisors to schedule an appointment for students with the Career Planning & Resource Center (CPRC)?
  - Could there be liaisons between these respective units as well as liaisons with and for faculty?
- Advisors would meet at least annually with faculty to learn of trends and options in the discipline / industry
- When do we assist the student in identifying next steps for the transition in thinking between choosing a major and choosing a career / industry?
  - When to ask what’s of interest and what the student is good at?
- Is there an exploratory tool (physical/online) which sets out milestones/expectations for students? Ex:
  - Declare major during the Sophomore year
  - If you want to graduate in 4 years, shout out to Lubar’s Edge as a promising practice
  - Construct tool(s) thematically for students in STEM fields and so on
  - Outline expectations early and reinforce them through students’ time at UWM
  - When to consider internships