

# 2020 Academic Advising In Service Training

September 17th & 18th

*Hosted by the Office of Campus  
Advising Coordination*



# Day #1 Agenda

- **Welcome! And Why We're Here**
- **Policies and procedures**
  - **Academic planning form**
  - **Request for medical information**
  - **Updates on the AAR**
  - **Review of recent policy/procedure changes**
- **Advising continuum**
- **Remote support programs and initiatives**

***THIS MEETING IS BEING RECORDED***

**Zoom poll: Do you work in college or major advising?**

**A. College Advising**

**B. Department/ Major Advising**

**C. Neither; I work in an office related to advising**

**D. Neither; I'm here because I LOVE Zoom meetings**

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**Why we're here**  
**New advising directions**



# Advising: a Teaching & Learning Activity

- NACADA's Concept of Advising
  - Advising as a Teaching and Learning Activity
  - Curriculum, Pedagogy, Learning Objectives (SLOs)
- UCSC's SLO's for advising

<http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Concept-of-Academic-Advising-a598.aspx>



# Academic Advising “Syllabus”

- **Syllabus is consistent with “Advising as Teaching”**
- **What students can expect from academic advising; what academic advisors expect from them**
- **Learning objectives for all four years**
  - **Developed as a folder with inserts last year**
  - **Being mailed to new frosh and transfer students**
- **Please reference in your Welcome Week presentations!**



# Academic Advising “Syllabus”

- **[See the folder here](#)**
- **[See the inserts here](#)**
- **[See the letter here](#)**
- **If you want us to mail you a copy, [submit your address here](#)**



# **Advising: New Directions for 2020-2021**

- **Advising Council**
  - **Intro to divisional leads**
- **Solidifying support for remote learning and advising**
  - **Improving processes/forms**
  - **Peer advising resources**
  - **Intentional remote engagement approach**
- **Consolidating Publications**
- **New approaches to supporting students in major exploration**



# Introductions- new staff!

*(if you are new to campus or your role since we started working remotely)*

# 2

## New Policy/ Procedure Overview

# Academic Planning Form: Veronica Lopez-Duran



# Academic Planning Form

- **Asking academic advisors to make the transition to electronic APF for new plans created in fall 2020**
  - Let us know if you need additional support to make this happen by emailing the [apfcommittee-group@ucsc.edu](mailto:apfcommittee-group@ucsc.edu)
  - We understand this will be a quicker transition for some than for others, looking forward to working with you to make this happen



# Academic Planning Form

- **“Undergraduate Academic Plans” Drive**
  - Shared with all individual college and department advisors that are part of CODA and Preceptors email groups
  - Shared with department advising emails listed in the College & Major/Minor Directory
  - Student Academic Planning Forms go into the “Plans” folder in this central drive.



# Academic Planning Form

- While students may develop a plan (with or without assistance from other campus staff, college advisors or peer advisors), only major/minor advisors will upload forms to the Plans folder after being reviewed/updated as necessary.
- Students can be referred to the planners in the [UCSC General Catalog](#) as one place to start developing their plan.
- Major/minor webpages often have sample plans for students.



# Academic Planning Form

- **Peer Advisors**
  - Insights from Linguistics
  - Meeting will be scheduled to receive additional input and suggestions and begin the development of guidelines for peer advisors
    - Verónica will reach out to advisors with established peer programs with an eye to ensuring representation from the various Divisions/BSOE for this meeting.



# Academic Planning Form

- Naming convention
- Slug success

Please review the full [Academic Planning Form Instructions document](#). Feedback/input can be provided via the google form link at the end of the instructions document.





# Academic Planning Form

**Join us for a “Template Development Session”**

Monday, September 21st 1:00-2:00pm

- Tips for creating a major/minor template with the APF
- Incorporating best practices
- Using additional tabs in the APF
  - Informational tabs
  - Creating Checklists
  - Using drop-downs

Request for Medical Info:  
Winnie Tang



# Request for Medical Information

- **DocuSign link**
- **Role of college/health center**
- **Business process**
- **Tracking form**
- **Working on Readiness to Return**



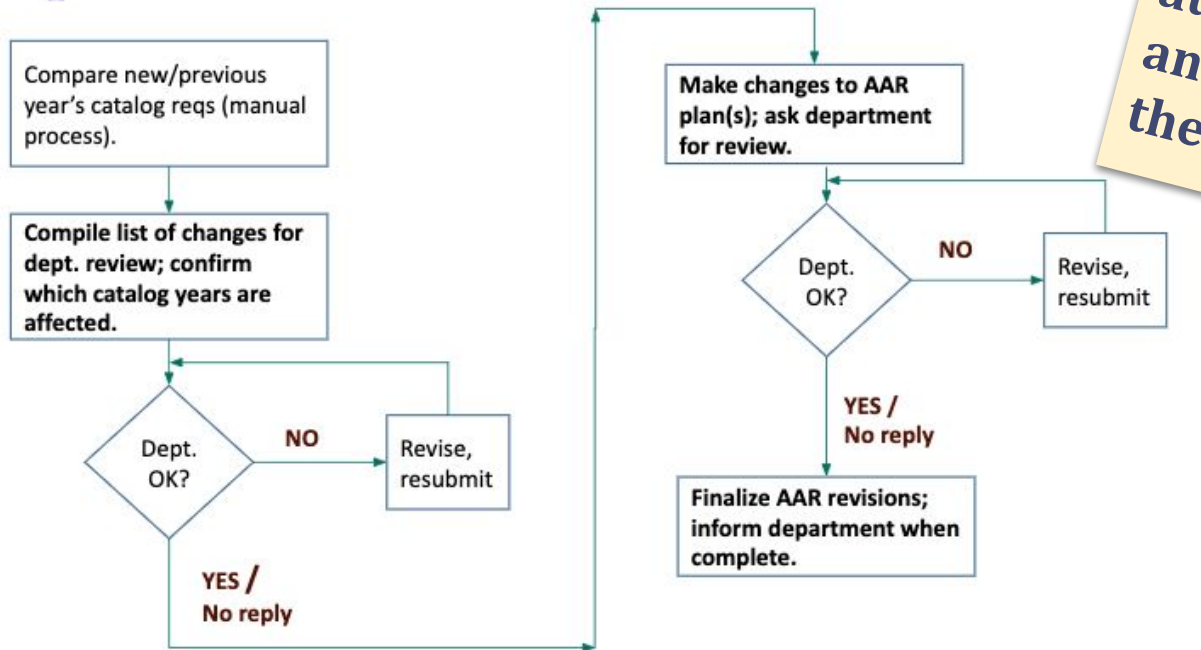
**TAKE A BREAK!**

*( back in 5 please )*

**AAR Updates:**  
**Kalin McGraw**

# AAR - Academic Advisement

## The Update Process



*Goal: degree audit matches and enforces the catalog*



# AAR - Academic Advisement

- **Working on updates to grading enforcement (Senate policy)**
  - Updating pass/no pass calculations to reflect exceptions
  - Developing documentation for student & advisor self-calculation
  - Removing grade requirement from DC courses
  - Supporting departments (by request) with allowing P grades, for degrees that normally require letter grades
- **Working on improvements to our process**
  - Collaborating with Divisional Advising Leads this year
  - Improving catalog and course review and documentation
  - **Adviser Survey!** Complete before Monday
  - Adding CRES this year, hope to add other new plans soon


# Reg Fall Opening: Weds 9/23

- **Change in format -**
  - Slides and information sent in advance - please review!
  - Town Hall format - questions submitted in advance, and answered in session.
- **Heads up:**  
Student Passcodes

Lesson 2 of 2

## UCSC Student Passphrase: Usage

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Adviser Homepage showing new Verify Student Passphrase tile

**Viewing a student's passphrase**

Everyone who has a staff role in AIS/MyUCSC will see a new tile on their homepage(s). The Verify Student Passphrase tile goes to a search page where you will enter the student's ID number to look up their passphrase.



# Recent Policy Changes: Stacey Sketo-Rosener



# Policy Updates

- **Some of the tools in your advising toolbox:**
  - **Advising.ucsc.edu - scroll down to “Adviser” section**
  - **Fall 2019 policy changes on advising.ucsc.edu**
  - **Grading policy matrix**
  - **Revised letter grade calculation for spring/summer 2020**
  - **General Catalog**
  - **Academic Senate Manual**
  - **CEP policies and guidelines**

True or False: students who are on probation can take classes P/NP in fall 2020

A. True

B. False

Hint: the answer is included on this matrix of grading policies

With the policy changes implemented fall 2019, how many credits do all students need to graduate?

- A. 150
- B. 178
- C. 180
- D. Credits don't matter as long as their GE and major are done

Hint: the answer is included on [this advising site page about fall 2019 policy changes](#)

True or False: The Student Advising Summary in MyUCSC includes the correct calculation for the P/NP graduation requirement

**A. True**

**B. False**

# Q&A

# 3

## Learning centered advising



# Advising Continuum

- **Blending methods in the same interaction**
- **Active and passive end points**
- **Passive forms of advising**
  - **Advisor pushes information in the form of service**
  - **Transactional, informational**
- **Active forms of advising**
  - **Advisor pulls information in the role as educator**
  - **Facilitator, coach**

Wilcox, E. (2016). *An End to Checklist Thinking: Learning-Centered Advising in Practice*. Retrieved from: <https://nacada.ksu.edu/Resources/Clearinghouse/View-Articles/An-End-to-Checklist-Thinking-Learning-Centered-Advising-in-Practice.aspx>



# 4

**Remote support programs and initiatives:  
Danielle Mello**



# Some “Central” Remote Resources

- **Keeping learning site:** [keeplearning.ucsc.edu](https://keeplearning.ucsc.edu)
  - ProctorU
  - Tips from UCSC students about remote learning
  - Time management during remote learning
  - Etc!
- **Resilience:** [healthycampus.ucsc.edu/wellness-initiatives/radical-resilience/](https://healthycampus.ucsc.edu/wellness-initiatives/radical-resilience/)
  - Fall resilience series
  - Community/ connection with other students
  - Keep overwhelm and anxiety to a minimum
  - Etc.!



## **And Resources Close to Home**

- **Share out: What are advising offices doing to support and engage students during remote instruction?**

**THANK YOU!**

*See you tomorrow!*

# 2020 Academic Advising In Service Training

Day 2: Friday August 18th

*Hosted by the Office of Campus  
Advising Coordination*



# Day #2 Agenda

- **Changes to our approach- Context**
- **Major preparation and selection**
  - Advising directions: first year etc.
  - Tracking and processing holds
- **Group discussion**
- **Upcoming Opportunities**

*As we go through our meeting items please think about how our communication with students can be framed with kindness in mind.*

# Introductions- new staff!

*(if you are new to campus or your role since we started working remotely)*

# 1

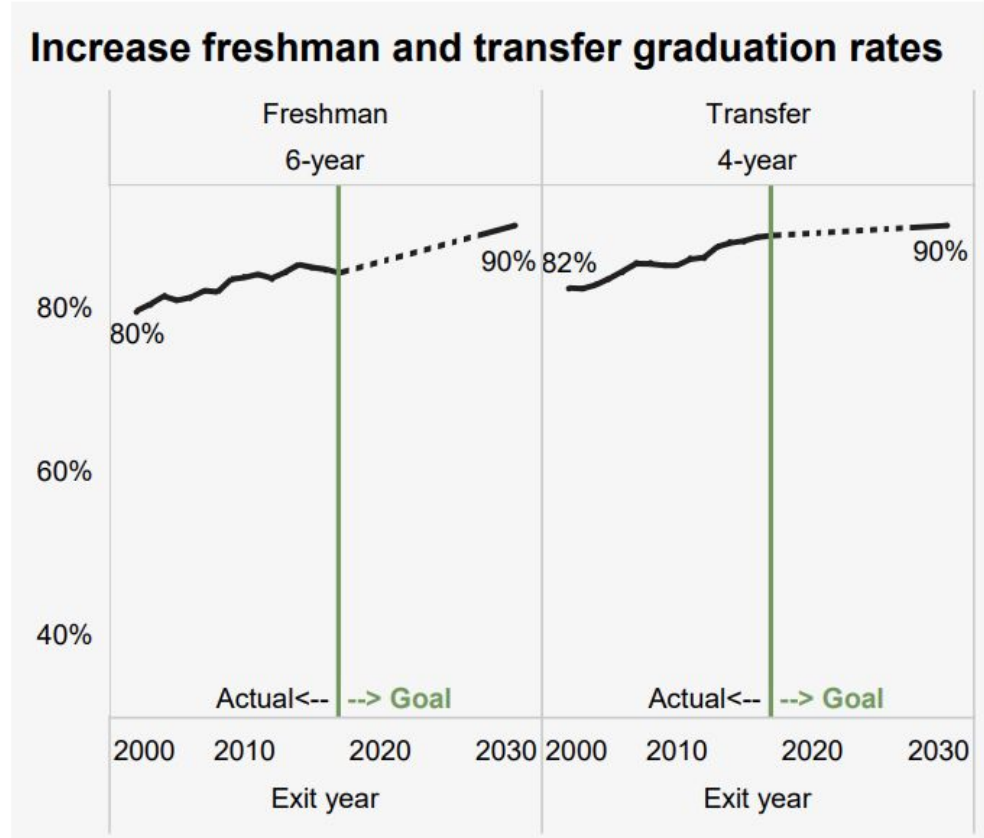
## Changes to our approach- The Context



# Changes to our Approach-

## The Context

- UC 2030 Goals



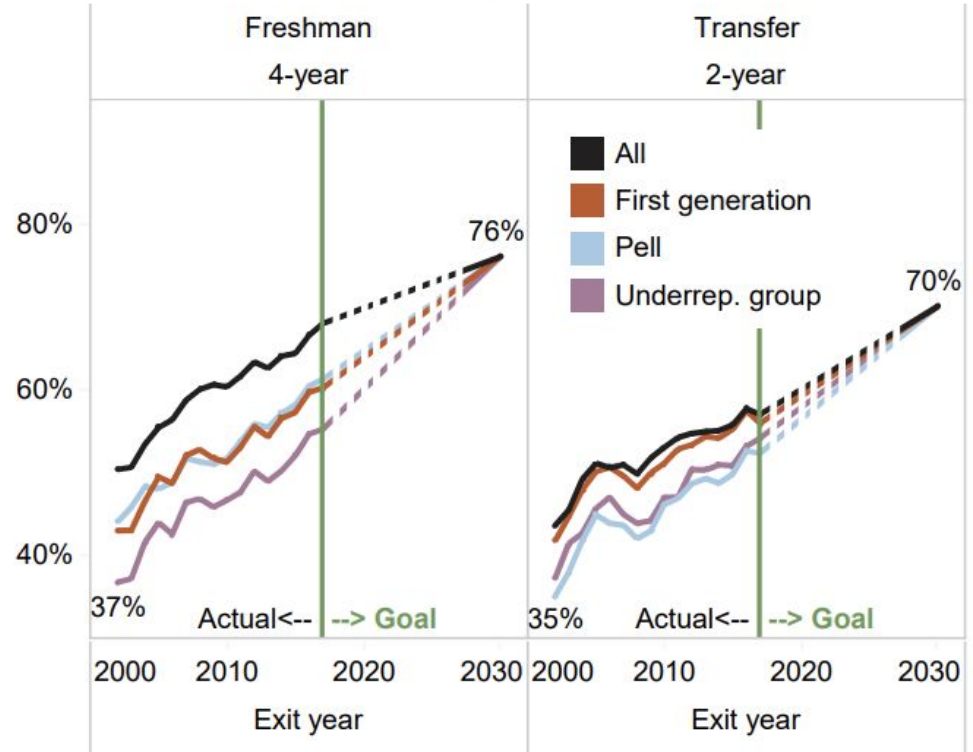
Data Source: [UC Accountability Report- 2019 Executive Summary](#)

# Changes to our Approach-

## The Context

Close graduation rate gaps by 2030

- UC 2030 Goals



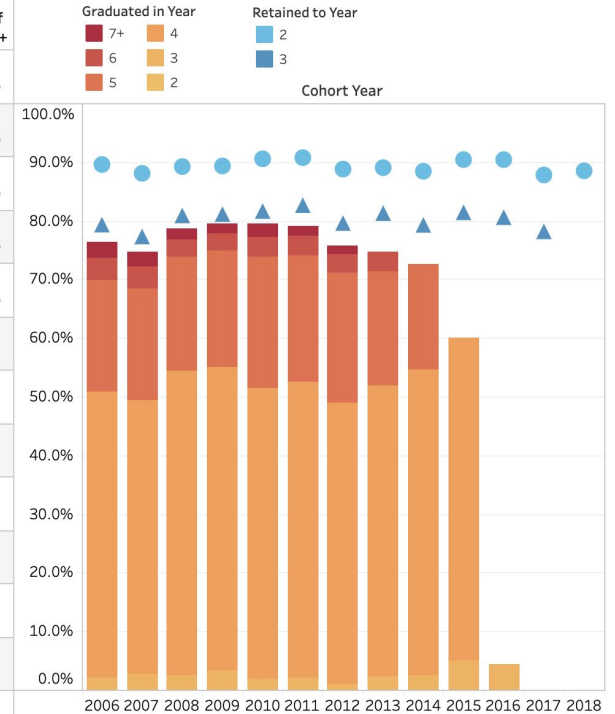
Data Source: [UC Accountability Report- 2019 Executive Summary](#)

# Changes to our Approach-

## The context

Retention and Graduation

Cohort Year	Cohort Count		Fall of Year 2	Fall of Year 3	Fall of Year 4	Fall of Year 5	Fall of Year 6	Fall of Year 7+
2006	3337	Retained to Graduated before	89.5% 0.0%	79.3% <10	75.4% 2.1%	20.3% 50.9%	2.4% 69.8%	<10 76.3%
2007	3704	Retained to Graduated before	88.0% 0.0%	77.3% <10	71.9% 2.7%	19.5% 49.5%	2.3% 68.5%	<10 74.3%
2008	3960	Retained to Graduated before	89.2% 0.0%	80.9% <10	75.7% 2.6%	19.6% 54.5%	1.7% 73.9%	<10 78.6%
2009	3214	Retained to Graduated before	89.3% 0.0%	81.1% <10	76.0% 3.5%	20.7% 55.2%	2.1% 75.1%	<10 79.6%
2010	3290	Retained to Graduated before	90.5% 0.0%	81.6% <10	78.5% 2.0%	23.3% 51.5%	2.2% 73.8%	<10 79.6%
2011	3606	Retained to Graduated before	90.7% 0.0%	82.6% <10	77.8% 2.2%	23.0% 52.7%	2.3% 74.2%	
2012	3826	Retained to Graduated before	88.8% 0.0%	79.6% <10	76.9% 1.1%	23.5% 49.0%	2.0% 71.1%	
2013	3302	Retained to Graduated before	89.0% 0.0%	81.3% <10	76.3% 2.4%	22.1% 51.9%	2.1% 71.5%	
2014	4033	Retained to Graduated before	88.4% 0.0%	79.3% <10	75.9% 2.5%	19.0% 54.7%	1.9% 72.6%	
2015	3616	Retained to Graduated before	90.4% 0.0%	81.4% <10	74.3% 5.3%	15.3% 60.3%		
2016	4218	Retained to Graduated before	90.4% 0.0%	80.6% <10	73.6% 4.6%			
2017	4045	Retained to Graduated before	87.8% 0.0%	78.1% <10				
2018	3701	Retained to Graduated before	88.5% 0.0%					



- UCSC Data: Retention, Graduation, and Time-to-Degree by Entering Cohorts (Native Freshman)

Data Source: [UCSC IRAPS](#)

# Changes to our Approach-

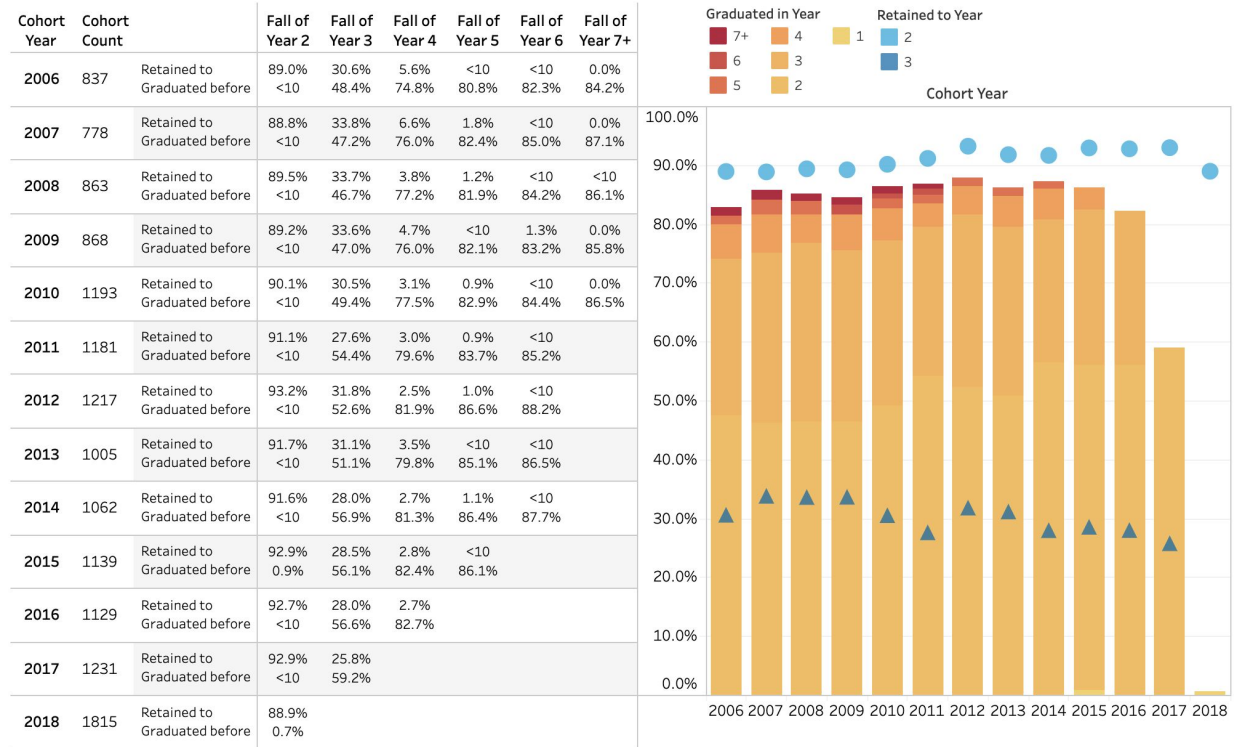
## The context

- UCSC Data: Retention, Graduation, and Time-to-Degree by Entering Cohorts (Transfer)

Admit Type: **Transfer**  
 Cohort Year: **2016**  
 Cohort Count: **1129**  
 Graduated in Year: **2**  
 Count of Students: **634**  
 % of Cohort: **56.2%**

Data Source: [UCSC IRAPS](#)

Retention and Graduation





# Changes to our Approach- The Context

- Research/literature supports connections between first year experience, sense of belonging and academic engagement as key components to timely graduation.



# Changes to our Approach- The Context

- **Policy on Major Declaration Process and Deadlines**  
Guidelines were approved in May 2019 and amended in October 2019.
- **Next Step: Policy Implementation Efforts for Fall 2020**

Students in their 6th quarter (2nd quarter for Jr Transfers) should petition to declare even if they have not completed major qualification courses or do not meet major qualification criteria.

**A. True**

**B. False**

Programs have to respond to 6th quarter (2nd Quarter for Jr Transfers) declaration petitions by:

- A. Allowing students into the major**
- B. Denying them admissions**
- C. Setting conditions that will be resolved within at most one more enrolled quarter**
- D. Any one of the above**



Students whose petitions to declare are denied, are not eligible to appeal.

**A. True**

**B. False**

All majors have an official appeals policy.

**A. True**

**B. False**

# 2

## Major preparation and selection

Advising Directions: First year etc.  
Sean Malone



# Supporting timely major qual & declaration

- **How can we better support our students in finding and qualifying for their major sooner?**
  - **Providing tools/opportunities for exploration**
  - **Outreach/support at time of not meeting qualification**
  - **Offering intentional support around transitions**



# How do we get there?

- **Colleges, Departments, Office of Campus Advising Coordination all contribute.**
- **Quarter-by-quarter**
  - **What are we already doing?**
  - **What else can we implement? (realistic, with existing resources)**
  - **What can we strive towards? (aspirational goals)**



## Summer (before a student's first quarter)

- Orientation module 2 includes video focusing on choosing majors and related support resources.
- Summer Edge- Stev 26 advising presentation focuses on overview of choosing a major/major qualification processes, Q&A.
- Address/coordinate “other credit” entry and math and writing pre-req issues to ensure students can access needed coursework in their first quarter.
- What else?! We’d love to hear from colleges/departments.



## Fall (1st year)

- Some colleges are piloting Canvas course with the aim of encouraging students to reflect on goals and interests and make connections with possible majors. (9&10)
- Colleges pursue goal of meeting with every frosh, either in groups or individually, with goal of discussion of interests/proposed major. Meetings guided by learning objectives. Slug Success Campaigns encouraged.
- Centrally coordinated Major Exploration Workshops offered during Welcome Week. Student panel focusing on major exploration and qualification.





## Winter (1st year)

- Departments encouraged to reach out to proposed majors and relevant advising clusters and hold info-session about major. (These sessions can include: how to schedule advising appts., developing academic plans, declaration and appeals process)
- Colleges continue with goal of meeting with as many frosh as possible, encouraged to use Slug Success campaign focusing on STEM students.
- All frosh receive central message re: planning for spring enrollment based on major classes; links to catalog for information about academic planning. Could include info re: declaration deadline, etc.



## Spring (1st year)

- All frosh receive central message asking them to confirm or change proposed major. Students in advising clusters should move to proposed major.
- Departments should run report to find students who are proposed in their majors and who have taken their major qualification courses but are not eligible to declare. If they do not appeal or if the appeal is rejected, their status may be changed to Undeclared. (as per CEP policy) Recommended that departments copy colleges on emails informing them of change to proposed UND.
- Cross College Advisers lead workshop for changing majors; this should include targeted outreach to students whose status was changed to UND.



# Aspirational

- Revamped Advising Clusters (likely with new name)
- Exploring collaborations with Career Center to enhance support
- There's room for departments to be strategic based on their curriculum-  
example of MCD Bio.

**Question-** how can we integrate conversations about interests, strengths, goals in our advising conversations (that may at times feel like transactions)?

**TAKE A BREAK!**

*( back in 5 please )*

Majors may place conditions that are based on courses that do not fulfill requirements for the major.

**A. True**

**B. False**

Conditions must present a \_\_\_\_\_ enrollment plan for the quarter.

- A. Unrealistic**
- B. Feasible**
- C. Challenging**

Programs may require that students complete the course requirements to declare the major by the campus declaration deadline. This means students must be in their final required course(s) no later than their:

**A. 5th quarter**

**B. 6th quarter**

# Students who have completed major qualification courses but are not eligible to declare the major...

- A. May be informed that they need to appeal to get into the major.**
- B. May be changed to undeclared if they don't appeal or if the appeal is denied**
- C. May go unnoticed if reports aren't developed to identify who they are**
- D. All of the above**



# Tracking and Processing Holds: Veronica Lopez-Duran



# Tracking and Processing Holds- Fall 2020 Policy Implementation

- 6th quarter letter is almost ready
- We will send it out once it is finalized
  - It tells students they must petition to declare and that departments will respond by either:
    - 1) Approving
    - 2) Denying (major appeal process and deadlines information to be provided by departments) **OR**
    - 3) Setting conditions that will be resolved within ***at most one more enrolled quarter*** (these conditions must present a feasible enrollment plan and be based on courses that fulfill requirements for the major)

# Fall 2019 Undeclared Students (term-2198)

(as reference/perspective)

- 3rd quarter: 29 students
- 4th quarter: 2,621 students
- 5th quarter: 887 students
- 6th quarter: 34 students
- 7th quarter: 392 students
- 8th quarter +: 73 students

In Spring 2020 there were 974 students with UND holds in their 6th quarter and 188 that were in 7th quarter +.

# Tracking and Processing Holds-

## General Timeline for UND Holds (Fall 2020)

<p><b>Prep work before Week 1</b> 3rd, 4th, 5th, 6th, 7th quarter + UND letters reviewed and updated by Office of Campus Advising. Timeline confirmed with Tchad re: UND messaging and holds for the quarter.</p>	<p><b>Week 2</b> UND letters/information sent to 3rd quarter + students by the Registrar's Office (Tchad). Preliminary database shared with CODA and Department Advisors (Reg office-Tchad).</p>	<p><b>Week 3</b></p>	<p><b>Week 4</b> Campus Declaration Deadline: October 30, 2020</p>	<p><b>Week 5</b> Major Dec. Working Group Bi-Quarterly Check-in Session with college and department advisors <b>(Friday, Nov. 6th 11:30-12:30pm)</b></p>
<p><b>Week 6</b> Final UND holds usually placed the day before advising week (approx. Thursday, November 12 for fall), final database shared with CODA and College Advisors (Reg Office-Tchad)</p>	<p><b>Week 7</b> Priority Enrollment begins November 19, 2020</p>	<p><b>Week 8</b> Enrollment continued- Thanksgiving =Thr. and Friday</p>	<p><b>Week 9</b> Major Dec. Working Group Bi-Quarterly Check-in Session with college and department advisors <b>(Friday, Dec. 4th 1:30-2:30pm)</b></p>	<p><b>Week 10 and Post Quarter efforts</b> Departments checking on students with conditions to be completed this quarter. College to follow-up with those who didn't meet conditions.</p>



# Tracking and Processing Holds- Fall 2020 Policy Implementation

- **What should our approach to 7th quarter + students be given the intent and purpose of the new policy?**
- **What would it look like to apply (or not) the policy to this group in the fall?**
  - For students, for departments, for colleges?
- **Implications for messaging (what modifications would need to be made to the 6th quarter letter to apply to 7th quarter + students)?**
  - Approvals?
  - Denials?
  - Conditions?



# Tracking and Processing Holds-

- **Past Practice: Reflections and Insights**
  - The purpose of this discussion is to learn about departments' and colleges' systems for keeping track of undeclared students who are at or near their declaration quarter, and consider how we can best coordinate our efforts moving forward.



# Tracking and Processing Holds-

- **Past Practice: Reflections and Insights**
  - **Departments:** If a college advisor was to ask you about a student (how close a student is to declaring, whether they will need an appeal, if their hold can be removed, etc.), what document, spreadsheet, or other resource are you using to find that information?
  - **Colleges:** If a department advisor was to ask you about your process related to students with undeclared holds, what document, spreadsheet, or other resource are you using to track that information?

*What is your current system for keeping track of your students' progress toward declaration and or your approach to undeclared holds?*



# Tracking and Processing Holds-

- **Past Practice: Reflections and Insights**
  - What challenges did your department/college face when using the spreadsheet that was used to keep track of all 6th quarter undeclared students in Spring 2020?

*If you could envision a system that would be similar across all departments/colleges, what would be your biggest “needs” or priorities in the creation of that streamlined approach?*

***WHAT IS POSSIBLE FOR FALL 2020?***





# Tracking and Processing Holds- Fall 2020 Policy Implementation

- **Items for ongoing consideration:**
  - Are there other stakeholders that need to be engaged at the department, college or campus level?
  - How to we begin to lay the groundwork for the 2020-2021 effort and prepare a strong foundation for Spring 2020 across departments and colleges?

***OUR CONVERSATION AND JOINT WORK WILL CONTINUE..  
JOIN US FOR CHECK-IN/INPUT SESSIONS DURING THE FALL!***



# Upcoming Opportunities!

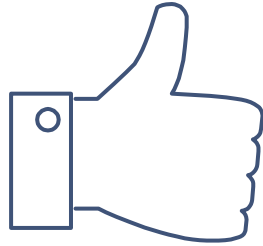
## Academic Impressions:

- [Adapt Your In-Person Peer Mentor Program for a Virtual Environment](#); Sept. 21, 8:00- 9:30 am
- [Fostering Student Belonging to Support Retention Despite the Global Pandemic](#); Oct. 19, 12:00-1:30 pm
- [Recognize Student Distress in a Virtual Environment](#); Sept. 28, 8:00 to 9:30 am

## Higher Ed: [Academic Advising Amid Social Distancing Article](#)

## NACADA:

- Academic Advising with Zoom - Best Practices
- [Virtual Advising example videos](#)
- [Advising in Times of Disruption document](#)
- Advising Continuity: Going Remote in Difficult Times
- Maintaining a Community of Care During the Coronavirus Crisis
- Appreciative Advising in a Virtual World
- Academic Advising Responses to COVID-19 in the U.S. Online Discussion



**THANKS FOR JOINING US!**