



THE UNIVERSITY  
of  
**WISCONSIN**  
MADISON

October 1, 2009

Provost Paul DeLuca  
150 Bascom Hall  
Campus

Dear Provost DeLuca,

On behalf of the university, and as the dean of the College of Agricultural and Life Sciences, I am pleased to submit the attached proposal authored by the university's Council on Academic Advising, entitled **Campus-Wide Shared Advisor Notes System** for Phase 1 funding via the Madison Initiative for Undergraduates. This campus-wide proposal meets the request for ideas that "generate faculty and instructional support ... to offer the courses, majors, and experiences students need" and those that "expand best practices and innovation in teaching and learning, curricular design, and student services in order to enhance student outcomes."

This proposal aims to develop an electronic system for maintaining and sharing advisor notes across units on campus, thereby improving the advising provided to students by ensuring that advisors have accurate and more complete information on their advisees, even when those students move between departments or schools and colleges (or other units, such as an honors or academic support program). This project is well-formulated, builds on the experiences and input of advising units across campus, has the potential to touch every undergraduate on campus, and is relatively low-cost (particularly compared to breadth of its impact).

The College of Agricultural and Life Sciences has been piloting an advising notes system that forms the foundation for this proposal and based on our experiences during this pilot phase, we fully support funding this project for the benefit of students in all the schools and colleges.

Sincerely,

Molly Jahn  
Dean and Director

## MIU Proposal for Campus-wide Shared Advisor Notes System

Submitted by:

Timothy Walsh, Assistant Dean and Director, Cross-College Advising Service,  
Co-chair, Council on Academic Advising

Jeff Hamm, Associate Dean, School of Education,  
Co-chair, Council on Academic Advising

Date: September 25, 2009

### Summary:

Last year, the Council on Academic Advising identified the lack of an electronic, campus-wide shared advisor notes system as one of the biggest impediments to improving advising services on campus. This proposal requests funding to begin a phase-one implementation of such a system.

Currently, as students progress on campus, usually seeing multiple advisors in a variety of school, college, and departmental advising offices, there is no shared advising notes system that would allow advisors to have some sense of the advising history of the students they see. Consequently, each new advisor a student approaches has no idea of the student's previous advising contacts or the nature of previous advising recommendations. This is very inefficient for advisors and for students, since advising appointments must often begin with the student and advisor piecing together their previous pertinent advising history (all of which could be readily available if we had a campus-wide shared notes system).

There are also many other particular situations—from arranged substitutions in the major for students about to study abroad to requests for special exceptions to college policies—where the lack of a shared advising note can cause a good deal of confusion and possibly lead to inadvertent misadvising.

The proposed campus-wide shared advising notes system will also include a student contact management system. A quick survey last year revealed that many departments and advising units do not keep even locally accessible advising notes, and many do not keep track of basic advising contact data, making campus-wide assessment difficult. Even for units that do keep extensive student advising contact data, the data collected and coding varies from unit to unit so that direct comparisons are difficult and aggregating data and statistics is complicated. The proposed new system should rectify this situation.

### Background:

For over 15 years UW-Madison student services staff members have discussed the advantages and possibilities of creating a shared, campus-wide anecdotal notes system. Historically, notes by advising staff and academic deans have been handled uniquely by each student services and student academic affairs unit. Systems have ranged from sophisticated internal databases to hand-written notes that go into each student's

file. Some individual advisors keep notes in personal files in their office. Some advisors keep no notes at all. There has never been any capacity for sharing advisor notes beyond the unit level on our campus.

Last spring the Council on Academic Advising (CAA) focused sustained attention on the issue. In April of 2009, the CAA voted unanimously to explore the development of an electronic shared advisor notes and student contact management system, specifically modeling the system on one currently being used by the L&S Honors program.

In May of 2009, Vice-Provost for Teaching and Learning Aaron Brower responded to this recommendation by formally charging the CAA with appointing a special Advisor Notes Taskforce to explore, develop, and implement the newly proposed system. The Advisor Notes Taskforce began meeting last summer, along with two subcommittees, a Technical Subcommittee and a Protocols Subcommittee. The taskforce and both subcommittees reported back to the CAA in September, and we are ready to take the next steps. The CAA has made the campus-wide advisor notes initiative its top priority for the current academic year, and, though it is still early in the process, we are planning to roll out a first phase implementation of the system by May 2010, pending funding.

#### Benefits of a Shared, Campus-Wide Advising Notes System:

The new shared advisor notes system will enhance service to students, improve advisor effectiveness and institutional integrity, and provide needed data for advising assessment, both at the local unit and campus-wide level. Particular benefits include:

*Sharing information among staff about student experiences, plans, and goals.* “Don’t you people ever talk to each other?” Like the student who made this complaint, many of our students believe that, despite our large and decentralized campus, staff who work with individual students should have shared information about a student’s background, experiences, and goals. Clearly there is a limit to what can be known and shared about a student. But it seems reasonable for staff to know with whom students have conferred, what directions students have pursued academically, and where the student is within their academic career. This can be especially important for staff in campus-wide services like Cross-College Advising Service and the L&S Honors Program, who see students with varied experiences and at very different times in their academic trajectory. In fact, when students complain about advising on campus, some administrators wonder whether the lack of shared information about students actually may be at the root of much dissatisfaction. Through a shared notes system, advisors, deans, and other staff can “talk” to one another and, in turn, better “hear” students.

*Recording promises or assurances.* Students often come to advisors and deans for decisions and reassurance. Students want to know if one course can substitute for another, if a requirement is actually met, or how far along they are toward completion of admission or graduation requirements. These and related “promises and assurances” are high-stakes concerns for our students. Students trust that they have received accurate information, that determinations are officially documented, and that there will be follow

through. For these reasons it is critical that a notes system indicate what promises or assurances have been made by whom. At the least, this allows an advisor or dean to leave her/his position and have a successor take a promised action without disadvantaging the student. In those rare occasions when information is incorrect or when assurances are given by someone unqualified to do so, shared notes allow colleagues to confirm this, take the appropriate action on behalf of a student, and make changes that ensure such errors do not occur again.

*Verifying previous decisions.* Occasionally students will “shop” among deans and advising staff for a particular answer to a question or solution to a problem. A campus-wide notes system can verify who a student has seen and what decision has been rendered on a case or situation. While this may not reduce student “shopping,” it does protect staff from reopening closed cases or contradicting previous determinations.

*Student Contact Management and Assessment.* The student contact management component of the shared-notes system will provide important campus-wide data regarding the nature and outcome of advising contacts that is currently not obtainable. Units and departments that currently do not have any student contact management system in place will have an easily accessible system available through the MyUW-Madison portal.

#### Costs and System Requirements (Summary from the Advising Notes Technology Subcommittee):

##### *System Requirements:*

The “Advisor Notes” system will document and make accessible advising notes regarding UW-Madison undergraduate students to be shared, as needed, among campus advisors. This will be achieved through advisor entry of anecdotal advising memoranda that document the topics/items, plans and goals, issues and challenges, and decisions or advisor-student agreements made during an advising contact. The system will also allow for the documentation of the primary reason(s) for each advising contact as determined by the advisor and as provided by the student.

The “Advisor Notes” system will provide advisors and advising administrators with the ability to obtain advising assessment data relating to advising unit load, types of advising used or accessed by students, and advisor load/contacts. This functionality will be achieved by obtaining data for each advising contact and providing that data to the advising unit for analysis.

The system will be integrated into existing advisor functionality and with other campus-wide applications, e.g., ISIS, My UW-Madison and security. In the initial phase, data integration will be limited to data currently available in campus-wide systems.

The system will be designed to allow for local control through distributed administration of user roles and data values, such as reason codes at the unit level. In the initial phase of the system, local control will be limited by access to data currently available.

*Costs:*

Preliminary assessment of this technology path indicates a need for **\$150,000** for the initial phase through May 2010. At \$90-\$100/hour, this includes:

- 320 hours design and project management
- 960 hours development and testing
- 160 hours training and support documentation development
- 80 hours training delivery

The system will be piloted with three advising units in spring 2010.

**Important note:** The current request for \$150,000 is for start-up and development funding, not a request for a permanent yearly transfer. The CAA will be submitting a subsequent MIU proposal in September of 2010 which will include yearly maintenance and upkeep.

Though \$150,000 represents a significant initial investment, the CAA would like to emphasize that this new system will benefit *all* undergraduates on campus and will improve advising services in all schools, colleges, advising units, and departments. From this perspective, it is a very cost-effective and wise investment.

Assessment:

Assessment of the efficacy and impact of the campus-wide shared advisor notes system will be ongoing by the CAA once we begin implementation and will include surveys and focus groups of advisors using the new shared notes system. More importantly, the Student Contact Management Module of the shared notes system will also make possible, for the first time, in-depth assessment of the nature, purpose, and outcomes of advising appointments across campus.

Concluding Remarks:

The Council on Academic Advising includes representatives from all undergraduate schools and colleges as well as related student services units. This proposed initiative has therefore already had wide campus discussion and has broad support across the advising community. The CAA is appointed by the Provost and is specifically charged to:

—Play a leadership role in University efforts to provide the best possible academic advising to UW-Madison students.

—Serve as an information-gathering communications and coordination center for advising efforts and issues across the university to help foster cooperation and coherence, including sharing best practices.

—Assess the academic advising needs of the diverse population of UW-Madison students and the success of our advising system in satisfying those needs.

—Assess and make recommendations regarding support and resources that would enhance the ability of academic staff and faculty involved in academic advising to be effective; examples include technology systems and professional development and recognition.

—Regularly advise the Provost on matters regarding academic advising.

This MIU proposal is being submitted by the co-chairs of the CAA (Jeff Hamm and Timothy Walsh) on behalf of the Council on Academic Advising and the individual advising units represented on the Council.