

**Advising Leadership Team**  
Monday, February 14, 2022

**Goals for AY 2021-22**

- Adopt Advising Process, Procedures, and Policies to Post-COVID-19 Needs & Practices

**Agenda [target action]**

- Advising – Update from Statewide Meeting: Student Conduct & Term Withdrawals– L. Vega [informational]
- Digital Advising Solutions per GI 2025 initiative – Ongoing Updates [informational]
  - GI2025 <https://www.calstate.edu/csu-system/why-the-csu-matters/graduation-initiative-2025/Documents/gi-2025-equity-goals-and-priorities-2021-22.pdf>
  - CSUB Smartplanner (High Point) support to end June 30<sup>th</sup>. CSU owns in perpetuity [informational]
- Academic Holds for Fall 2022 decision—to be placed after Census (2/18/2022), Appendix A – L.V. [actionable]
- Advising Task Force (ATF) – Nomination/Vote of 1 ALT Representative – Appendix B. L. Vega [actionable]
  - *Schools will hold own nominations/elections for a staff advisor representative to ATF*
- Professional Development Fund-Usage – Budget Proposal – Appendix C [actionable]
- Administrative Unit Assessment for ALT – Mission, Goals, & Measurable Objectives [WSCUC requirement]
  - Draft for instrument (2/14/2022) Revisions/ Suggestions needed [actionable]
- Restructuring advising models, EAB (RunnerConnect) workshop Jan. 13, 2022 [Task Force Relevant] carried over from last meeting <https://drive.google.com/file/d/1dH1P-h178SVCrxhNjWL7W8Zu8n2B6SBE/view>

**Parking Lot**

- Meta Majors discussion [IRPA data]
- Double major data presentation—When is 2<sup>nd</sup> major declared?
- Mental Health Training Collaborative – M. Medina Cruz/I. Pesco
- Governing Document – L. Vega
- School-Based Faculty-Professional Advisor Balance
- Elect 1000 problem: (Evaluators; Degree Audit; Advisors; Grad Check)
- GEAR Exam Times and Computer lab
- Change of Major/Minor
- WSCUC Recommendation and Special Visit Preparation – B. Street
  - a. Recommendation 3: *Ensure consistency, effectiveness, and quality of academic support services, including advising, tutoring, supplemental instruction, and course scheduling, to enhance student success for all students. (CFRs 2.12, 2.13) The Commission appreciated learning about the launch of the Council for Faculty Advising, additional staff for tutoring and supplemental instruction, and other changes in this area.*
  - b. Spring 2023 Special Visit: *Academic support services: Data on students served, disaggregated by demographic variables; organizational charts, staffing ratios, and resource allocations to service units; evidence of effectiveness of academic support services*
- WSCUC Special Visit Preparation –
  - a. ↘Advising data collection strategy
  - b. ↘Advising organizational chart
  - c. ↘Document advising ratios
  - d. ↘Document resource allocations for advising
  - e. ↘???? Collect evidence of advising effectiveness

### Logged Record

Date	Issue/ Stakeholder	Resolution	Item Status		
			Pending	Open	Closed
2022.01.31	Virtual Professional Development Plan for Advisors	Student Success Network Webinars During COVID-19			X
2022.01.31	Digital mapper options	Contract with EAB system	X		
2021.10.25	Academic Petitions Processes and Advisors' Roles	Forms are being edited.	X		
2021.10.11	Stretch Program Changes	Stretch students will be enrolled as a block schedule.			X
2021.09.27	Academic Support Services	Ongoing WSCCU implementations of consistency, effectiveness & quality of advising and tutoring services.		X	
2021.09.27	Program Plan Mapper.	Academic operations has a synchronization strategic plan in place.			x
2021.09.13	Notes in RunnerConnect Policy Referral	Sent to Provost (9/22/21) see p. 5)		X	
2021.08.30	Duan Jackson's, CO, Advising Visits	Cancelled due to GI2025			X
2021.08.30	Guided Registration: English Place.	Wrong English Placements Corrected Manually			X
2021.06.21	Freshmen Housing Requirement for Fall 2021	Website has information and a place to ask questions. There is an online form.			X
2021.06.21	GE Area F in the Academic Requirements page	It is now in the academic requirements page.			X
2021.08.16	Implications of the 2021-2022 catalog release date	Anticipating future catalogs delivered on time	X		
2021.08.16	Enrollment, Cancellations, Holds	Information on holds can be requested from Dr. Cantrell	X		
2021.08.16	Fall Sports – Enrollment – M. Medina Cruz	Placeholder courses and Runner Connect notes communication			X
2020.05.17	Catalog time gaps; policy recommendations to the Provost; Institutional priorities; collaboration with Faculty Advisors		X		
2020.12.14	Transfer Students (no concentrations)- Barriers		X		

2020.11.30	Catalog Rights Guide		X		
2020.11.02	Adding 2 <sup>nd</sup> /3 <sup>rd</sup> Major/Minor	Collecting data	X		
2020.10.19	Advising Calendar	On the table	X		
2020.10.19	Advising Holds' Releases T. Boone	Fall 2020; plans for future	X		
2020.10.05	Special population early enroll.	By law / GI25/ Lrn. Comm	X		
2021.02.08	Inside Track visit	Done / Follow up		X	
2020.11.16	Admission, Registration, Advising			X	
2020.11.16	Final Transcript Evaluations			X	
2021.06.21	2 <sup>nd</sup> Degree Students Enroll/advice	B. Perlado, enroll. Realigned			X
2021.06.21	CSUB 1029 - clarifications	GE re-alignment/ done			X
2021.06.21	Department Chair Signature on Add/Drop Form	AdobeSign routes to chair			X
2021.04.12	GI 2025 Professional Staff advisor	It was agreed 1 person would be elected			X
2021.04.12	Instructional modalities	Annotation in PeopleSoft			X
2021.03.22	Disqualified Students admitted after last day to add [Appeal of disqualification]/ Petition for re-admission]	Appeals must be submitted 2 weeks prior to classes beginning.			X
2021.03.08	Admissions, Registration, Advising flow	Workflows have been shared.			X
2021.03.08	Students and Faculty relying on Degree Progress Report (DPR) to calculate units	Issue fixed in degree audit.			X
2021.03.08	Grad Check 90-unit eligibility	Keep it at 84 units.			X
2021.02.22	Junior/Senior Graduation checks				
2021.01.27	Degree Audit Q2S Change	List of students sent.			X
2020.12.08/9	Inside Track Mental Health	emotional support, tactical empathy, Suicidology / self-care			X
2020.11.02	Reserved Courses (Block Scheduling/ Honors)	Developed process and communication flow			X
2020.10.05	Immunization Holds J. Allred	Instructions provided			X
2020.10.05	B1/B2/B3, L. Gubkin/L. Zuzarte	Fixed in Peoplesoft			X
2020.10.05	Advising listserv/SSN – K. Z-L	1-way messages only			X
2020.09.21	Athletic units & ADT – B. Mendiola	Title IX req's/existing rules			X
2020.09.21	Time Conflict Issue- L. Zuzarte	Conflict overrides			X

## Appendix A

- Academic Holds for Fall 2022 decision—to be placed after Census (2/18/2022), Appendix A – L.V. [actionable]

### **Holds for Spring 2022 Registration --- Should we use same plan for Fall 2022? Changes?**

Advising holds to be placed on new- and transfer-students, graduation holds on juniors, and graduation notifications on seniors. To be placed after census day, September 20<sup>th</sup> [February 19] by the Registrar’s Office.

#### **Academic Holds Placement Schedules**

	<b>Fall term Registration</b>	<b>Spring Term Registration</b>	<b>Hold Placed</b>
<b>Freshman</b>	Advising hold	Advising hold	Hold placed in late spring before freshman enter the University for fall classes on October of their first semester for spring classes. Students would meet with an advisor during the spring/summer before their freshman year and during the fall term (October) during advising.
<b>Sophomore</b>	Advising hold		Hold placed during late spring of students student’s freshman year for sophomore fall classes. Students would meet with an advisor during the spring term (April/May) during advising.
<b>Junior</b>		Graduation hold	Hold placed during fall term (October) of student’s junior year for spring classes. Students would meet with their advisor during the term (October) during advising.
<b>Senior</b>	Graduation notification	Graduation notification	<i>Notification</i> placed to do a graduation check during fall term (October) of student’s senior year for spring classes. Students can meet with their advisor during advising (October). <i>Notification</i> will remain in place for spring registration as well.

A note on graduation *Notifications*: Students who keep to the advising calendar will know requirements for graduation. Notifications during senior year will serve as reminders for them to book a graduation check with an academic advisor. Chairs wishing to institute an advising hold instead are asked to contact their school advising team liaison and our Registrar ([jmccune@csub.edu](mailto:jmccune@csub.edu)). Also, RunnerConnect allows us to run graduation campaigns and chairs are encouraged to use those functions to contact students nearing graduation.

## Appendix B

- Advising Task Force (ATF) – Nomination/Vote of 1 ALT Representative – Appendix B. L. Vega [actionable]

### Senate Charge to Subcommittees Giving Rise to **Advising Task Force**

- What circumstances prompt advising from Staff Advisors
- What circumstances prompt advising from Faculty Advisors
- Whether the shared databases (Peoplesoft and/or RunnerConnect) are serving students optimally
- Whether changes are needed in the shared databases
- The rationale behind advising holds
- When to apply advising holds
- Who applies advising holds
- Whether there is a need for a change to the advising structure

*GS&SS Will Present Fact Findings from multiple stakeholders and Recommendations*

Senate has established a **Campus-wide Student Advising Task Force**. This ad hoc committee will review the current structure of student advising to determine how to improve collaboration between faculty advising and staff advising to provide a seamless and consistent service to our students.

### **Charge of Task Force**

- Establish principles to guide deliberations
- Select a Chair
- Consult the report, *Academic Support Services at CSUB: Student Success through Advising, Tutoring, Supplemental Instruction, and Course Scheduling* for recommendations
- Consult *Referral #10 Faculty Advising and Staff Advising Structure* for guidance
- Consult the *University Handbook* to ensure compliance with the existing policy
- Consider potential benefits and challenges of the changes, if recommended
- Consider potential financial impact of changes, if recommended
- Consult with campus leaders and gather necessary information
- Deliver their recommendation to the Senate Executive Committee by April 5, 2022

The committee consists of one faculty advisor from each school, one staff advisor from each school, a representative from Senate AS&SS, **and a representative from the Advising Leadership Team**. Dr. Brian Street, author of the *Academic Support Services at CSUB: Student Success through Advising, Tutoring, Supplemental Instruction, and Course Scheduling*, shall serve as non-voting member.

Call for: **(1) Advising Leadership Team member**

Appendix C

- Professional Development Fund-Usage – Budget Proposal – Appendix C [actionable]

Dr. Harper has approved the allocation of \$60,000 to support the professional development of CSUB’s academic advisors. Suggestions?

PLAN A



Welcome Back:  
Stronger, Better & More Resilient  
March 16-18, 2022  
Orange, CA

<https://nacada.ksu.edu/Community/Regions/Region-9/Registration-Information.aspx>

REGISTRATION INFORMATION

Conference Registration Fees	On or before February 16	On or after February 17
<b>Current NACADA Member</b> (does not include membership fee)	\$155 USD	\$205 USD
<b>Student/Retiree</b> (not full-time employee and does not include membership fee)	\$100 USD	\$100 USD
<b>Non-Member</b>	\$255 USD	\$305 USD

PLAN B --- 42 Ipads = \$41,085.57

CSUCCESS offers a new iPad Air, Apple Pencil and Apple Smart Keyboard Folio to every Spring 2022 incoming first-year and transfer student at 14 participating CSU campuses during Phase Two. Students at CSUN share their thoughts about Phase One of the program as they pick up their CSUCCESS technology bundles at the start of the fall 2021 term.

Request for estimate February 10, 2022

Hi Kyle,

I saw (<https://www.calstate.edu/impact-of-the-csu/student-success/CSUCCESS>) how the system is providing an Ipad for new students. I chair the Advising Leadership Team. There are about 42 staff advisors. I thought I could use some of the funds the Provost has for us to buy one for each advisor. How much will I be looking at?

It is for professional development, and because the advisors see students, it will be good for them to see how students access their courses, and services. I know some faculty have bought iPads out of their pocket. It may not be good idea if it's too expensive though. Thanks for your insights. I'm always grateful for your help. Luis

PLAN C

Another Option --- Organized a Retreat for morale booster and professional development

Cost – depends. Mental Health Care Kit? Webinar? Other Skill Development?

## Appendix C

- Administrative Unit Assessment for ALT – Mission, Goals, & Measurable Objectives [*WSCUC requirement*]
  - Draft for instrument (2/14/2022) Revisions/ Suggestions needed [*actionable*]

Strategy 3 – Develop and Enhance Advising 1.3.1 through 1.3.5 <[Link](#)>

### Advising Leadership Team

The Advising Leadership Team is a coordinating body that makes referrals to the Provost Council to improve advising at the university. It coordinates implementation for effective and consistent advising by professional staff in alignment with department and school needs; oversees student advising activities that, “Strengthen and Inspire Student Success and Lifelong Learning,” [University Strategic Plan Goal 1]; provides academic and support services in the advising process that will lead to degree completion and student success, through academic integration of GE, major requirements, and removal of barriers when possible; coordinates and initiates referrals to liaison services such as disabilities, financial aid, counseling, and other services as needed; and serves as first-responders to emergent issues like the pandemic, academic holds, academic calendar discrepancies, and ongoing technology issues that impact degree audits and time to degree. [<https://www.csu.edu/academicprograms/advising-leadership-team>]

### Assessment

*Composition:* The Advising Leadership Team (ALT) is composed of the Schools’ associate deans, professional advisor-lead representatives for each school that rotate yearly, and student services and athletic-advising representatives.

*Mission statement* (see above) included *purpose, beneficiaries, functions, alignment, and distinctiveness*.

**Outcome 1** Advising touchpoints counts will be documented by type (academic hold, class level, percent of students in group served) [consistency across schools]

**Outcome 2** Advising sessions will be rated by students to produce indexes of satisfaction, advising effectiveness, and recommendations [quality measures]

**Outcome 3** Advising tracking for feedback of GE completion, liaison referrals, and chokepoints

To be put in Qualtrics

**O1:** Major? \_\_\_\_\_

**O1:** Class level? Are you?  New student,  Freshman,  Sophomore,  Junior,  Senior

**O1:** Advising session topic (check all that apply)  academic hold,  General education,  major requirements,  Career,  Probation,  Other (specify? \_\_\_\_\_)

**O2:** Advising session met your expectations (check one)  well,  somewhat well,  not well

**O2:** Advising session has increased my confidence in knowing course work requirements?  Yes,  No

**O3:** Advising issues you wished you had received more information. \_\_\_\_\_ .

**California State University, Bakersfield**  
**Administrative Unit Assessment and Review**

### Overview

At its February 14, 2020 meeting, the WASC Senior College and University Commission (WSCUC) reaffirmed the accreditation of CSU Bakersfield. As part of this action, WSCUC instructed CSU Bakersfield to “establish the process of regular assessment of administrative units, including external reviews where appropriate, to engage in continuous improvement and ensure effectiveness (CFR 4.1).”

### Vision

By Fall 2022, CSUB will employ a deliberate set of quality-assurance processes in administrative (non-academic) areas. These processes include collecting, analyzing, and interpreting data; tracking results over time; using comparative data from external sources; and improving structures, services, and processes.

### Values

- Excellence: Assessment is used to achieve the mission of the university, namely advancing the intellectual and personal development of its students.
- Meaningful: Assessment measures what matters to our institution and our stakeholders.
- Continuous: Assessment is on-going and iterative, not episodic.
- Self-Reflective: Assessment entails honest self-reflection on the achievement of one’s goals.
- Multi-modal: Assessment utilizes multiple measures and multiple sources of information.
- Actionable: Assessment results are utilized to improve structures, services, and processes.
- Participatory: Assessment involves widespread participation of faculty, staff, and students.

### Objectives

By the end of Fall 2021, CSU Bakersfield will develop a plan for the regular assessment of administrative units and document this plan in Taskstream, the campus Assessment Management System (AMS).

1. All units will develop mission statements and align their missions to the university vision, mission, and values.
2. All units will identify goals and outcomes for their units and align those goals and outcomes to the university strategic plan.

By the end of Spring 2022, CSU Bakersfield will implement its plans for the regular assessment of administrative units.

1. All units will identify two measures per outcome.
2. All units will develop a schedule for assessing all outcomes within a five-year period.
3. All units will identify a process for “closing the loop” on their assessment findings, which should be documented yearly.
4. All units will develop an external review process.