

Academic Advising:

Cross-school collaboration to enhance the undergraduate student experience

July 20, 2018

Northwestern

Today's Presenters

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Session Overview

- Northwestern Overview
- Strategic Context
- Northwestern's Journey
- Participant Poll and Discussion
- Critical Factors for Success
- Wrap Up/Lessons Learned
- Discussion

Northwestern Overview



3 campuses located in Evanston and Chicago IL, and Doha Qatar
50+ university research centers and institutes
\$676.5 million annual research funding

Colleges and Schools



Weinberg College of Arts
and Sciences



School of
Communication




School of Education and
Social Policy




McCormick School of
Engineering and Applied
Science



Medill School of
Journalism, Media,
Integrated Marketing
Communications



The Graduate School



Pritzker School of Law



Kellogg School of
Management



Feinberg School of
Medicine



Bienen School of Music



School of Professional
Studies



Northwestern in Qatar

Strategic Context



Student Body

- Increasingly diverse undergraduate population
- Students pursuing multiple areas of study, double and even triple majors



University Priority

- Stated goal for 20% of entering class student body to be eligible to receive Pell Grants by 2020
- Poised to achieve early



Faculty Task Force

- Proposals regarding academic experience and advising resources
- Issues navigating multitude of advisers

Coordinate interactions among advisers, possibly through a personalized advising site for each student and facilitating, coordinating, and managing complications or ambiguities that arise from advising across academic structures.

Discussion question:

- How does this context compare to your institution?
- Are there academic priorities that might be enabled through the implementation of an advising system or another tool for supporting student success?

Northwestern's Journey

Journey Overview





From

- Six undergraduate schools
- Three with no advising system, three with a system
 - One homegrown system
 - Two used same system but...separate instances
- Asymmetrical data availability
- Distinct processes
- Universal scheduling challenges

To

- Six schools on a single system
- Additional academic support units also using the system
- Consistent data available to users
- Evolving processes and mechanisms for coordination

The Tool: AdviseStream

-  Access a common set of **student information** as a starting point for advising interactions
-  Communicate through a **messaging** function
-  View adviser availability in real time and **schedule** appointments
-  Document and **share information** on advising interactions through the notetaking function



search advisees by first/last name or student ID or preferred



Advisee Management

Office Of Fellowships



Actions ▾

Profile

Advising Notes

Advisors

Messages

Events

Aspirations Planner

Academics & Engagements

Library

Portfolio and Resumes

Apply Planners

Summary

Office of Fellowships

Timeframe
UNDERGRADUATE

Admit Term
FALL 2015

Admit Type
--

Expected Grad Term
2019 Spring

Completion Term
--

Preferred Phone

Northwestern NetID

Student Status
Active in Program

School(s)
School of Engineering

Academic Level
Senior

* No longer in Program/ School

Cumulative GPA
3.76 cumulative
3.62 math/science
3.79 other

Transfer Student
No

Dual Degree Student
Yes

Inter School Transfer
No

Major(s)
Mechanical Engineering
(BSME)
Materials Science and Eng:
MS

Minor(s)/Other
--

Varsity Sports
Wrestling

Special Program(s)
Student Athlete

Cohort
2015 Freshmen

Application Summary

Health Profession Aspirations
1 --
2 --

Planned Matriculation Year
--

Intent to Apply
1 --
2 --

of Application Schools
--

Accepted Count
--

Rejected Count
--

Matriculation School
--

Advising

MESSAGE ALL

Primary Advisor(s)
Oluwaseyi Balogun

Athletics Advisor(s)
Candynce Boney

Program Chair(s)
Manohar Kulkarni

HIDE

Messages

Events

Aspirations Planner

Academics & Engagements

A & E Planner

Course List View

Library

Portfolio and Resumes



Apply Planners

 Browse Research and Engagements

Key

TERM GPAS

- ☒ Overall GPA
- ☐ Math/Science GPA
- ☐ Other GPA

-  Current Term
-  Dean's List

filters

☒ all filters

► Timeframes

► Course Type

► Engagements

► Status

► Importance

Northwestern University

3.76 Cumulative Overall GPA

2015/16

1st year

2016/17

2nd year

2017/18

3rd year

2018/19

4th year

FALL

WINTER

SPRING

SUMMER

FALL

WINTER

SPRING

SUMMER

FALL

WINTER

SPRING

SUMMER

FALL

WINTER

SPRING

GPA and Courses (54.2 completed credits)

3.85 3.5 3.4 3.83 3.93 3.87 3.68 3.9 3.86



BIOL_SCI 1XX T	DSGN 106-1	CRDV 301-0 S
CHEM 101-0 T	DSGN 106-1 A	DSGN 106-2
CHEM 102-0 T	EECS 211-0	DSGN 106-2 A
CHEM 103-0 T	EECS 211-0 B+	EECS 202-0 B+
CHEM 121-0 T	ENGLISH 106-1 A	EECS 202-0
CHEM 122-0 T	GEN_ENG 206-2 A-	ENGLISH 106-2 A
CHEM 123-0 T	MATH 234-0 B	GEN_ENG 206-3 B
ECON 201-0 T	MATH 234-0	IEMS 326-0 B+
EECS 110-0 T	PRDV 396-0 S	
EECS 111-0 A-		
ENGLISH 11T T		
GEN_CMN 102-0 A-		
GEN_ENG 206-1 A		
HISTORY 2US T		
MATH 220-0 T		
MATH 224-0 T		
MATH 230-0		
MATH 230-0 A		

GEN_ENG 205-4 B+	CIV_ENV 216-0 A-	DSGN 246-0 A
MAT_SCI 201-0 A	CIV_ENV 216-0	MECH_EN 240-0
MAT_SCI 201-0	MECH_EN 202-0 A	MECH_EN 240-0 A-
PHYSICS 135-2	MECH_EN 222-0 A	MECH_EN 362-0 A
PHYSICS 135-2 A	PHYSICS 135-3	MECH_EN 363-0 A-
PSYCH 110-0 A	PHYSICS 135-3 A	MECH_EN 382-0 A
	PHYSICS 136-3 A	MECH_EN 382-0

MECH_EN 233-0 A-	MAT_SCI 351-1 A	MATH 300-0 B+
MECH_EN 241-0	MAT_SCI 381-0 A-	MATH 300-0 B+
MECH_EN 241-0 B+	MECH_EN 377-0 A	MECH_EN 224-0
MECH_EN 340-1		MECH_EN 224-0 A
MECH_EN 340-1 A-		MECH_EN 224-0
MECH_EN 390-0 A		MECH_EN 224-0 A
		MECH_EN 315-0 A
		MECH_EN 315-0
		MECH_EN 315-0 A
		MECH_EN 315-0
		MECH_EN 322-0 A
		MECH_EN 395-0 A
		MECH_EN 395-0 A

ES_APPM 311-1
ISEN 410-0
MAT_SCI 402-0
MAT_SCI 402-0
MAT_SCI 451-0
MAT_SCI 451-0



Advisee Management

Prehealth



Actions

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Academic Standing

Good Standing

☐ My Advising Notes

☒ All Advising Notes

Advanced Search

All Advising Notes (11)

+ NEW NOTE

DELETE

EXCEL

1

Notice: Students have the right under FERPA to inspect and review all records including private notes. FERPA information can be found [here](#).

<input type="checkbox"/>	DESCRIPTION/TOPIC	AUTHOR	APPT. DATE	DATE CREATED	DATE UPDATED
<input type="checkbox"/>	Reference for YMCA summer volunteer	Maltenfort, Mich...	--	May 29, 2018 11:32 AM	May 31, 2018 01:35 PM
<input type="checkbox"/>	Double counting distro/minor question	Maltenfort, Mich...	--	May 16, 2018 01:39 PM	May 31, 2018 01:25 PM
<input type="checkbox"/>	Study abroad---distro question	Maltenfort, Mich...	--	May 15, 2018 04:16 PM	May 16, 2018 12:03 PM
<input type="checkbox"/>	Passed Bio 217: study abroad approval	Maltenfort, Mich...	--	Dec 18, 2017 05:46 PM	Dec 18, 2017 05:46 PM
<input type="checkbox"/>	Preparing to study abroad in Morocco	Maltenfort, Mich...	Nov 15, 2017 04:00 PM - 04:30 P...	Nov 07, 2017 10:01 PM	Nov 15, 2017 04:59 PM
<input type="checkbox"/>	Canceled : Advising Appointment	Maltenfort, Mich...	--	Nov 06, 2017 12:39 PM	Nov 06, 2017 01:18 PM
<input type="checkbox"/>	From Archived Note	Maltenfort, Mich...	--	May 08, 2017 11:00 PM	May 08, 2017 11:00 PM
<input type="checkbox"/>	Current or future courses	Maltenfort, Mich...	Feb 17, 2017 03:30 PM - 04:00 PM	Feb 16, 2017 11:00 PM	Feb 16, 2017 11:00 PM
<input type="checkbox"/>	Email/Research	Maltenfort, Mich...	--	Feb 02, 2017 11:00 PM	Feb 02, 2017 11:00 PM
<input type="checkbox"/>	From Archived Note	Maltenfort, Mich...	--	Jan 16, 2017 11:00 PM	Jan 16, 2017 11:00 PM
<input type="checkbox"/>	First meeting with adviser	Maltenfort, Mich...	Jan 06, 2017 02:30 PM - 03:00 PM	Jan 05, 2017 11:00 PM	Jan 05, 2017 11:00 PM

298

advisers

3

phases

16,641

appointments

754

student emails

6

schools

11,350

during business hours

115

requests for support

5

student support offices

5,291

outside business
hours

Poll: Where are your institutions
today?



To show this poll

1

Install the app from
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2

Start the presentation

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To show this poll

1

Install the app from
pollev.com/app

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Start the presentation

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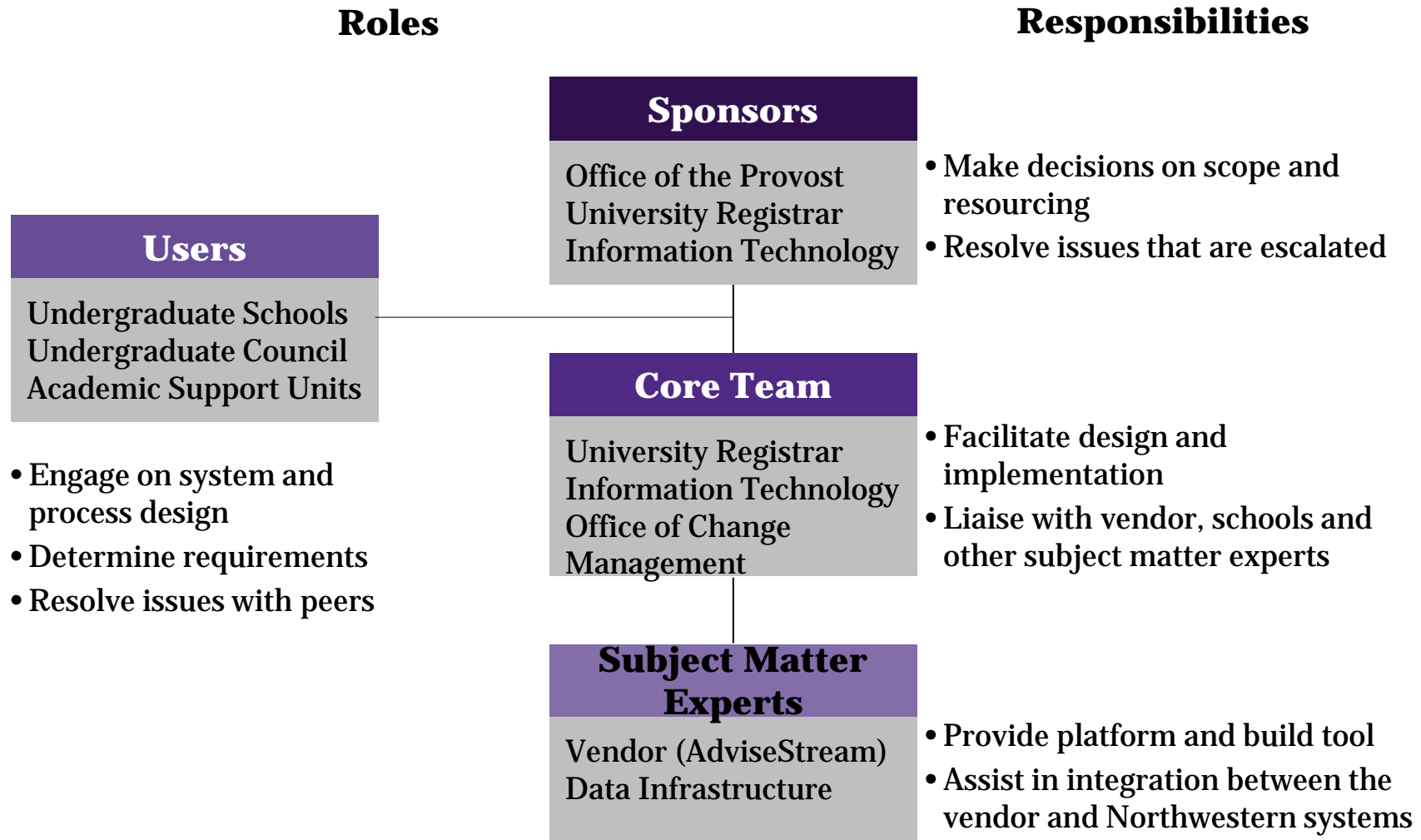


Critical Factors for Success

Critical Success Factors

- 1 Assembling the right team
- 2 Developing guiding principles
- 3 Taking a phased approach to implementation
- 4 Establishing clear governance
- 5 Managing change with intention

1 Assembling the Right Team: Cross-Functional Perspectives



2 Developing Guiding Principles

Scalability

Design of the advising platform and related processes should be scalable to accommodate future expansion usage to additional student and adviser populations across the University.

Design and Process Choices

Standardize design and process choices that impact students, when possible, in support of a seamless student experience.

Seamless Student Experience

Optimize student experience where possible, and accept more variability on elements and processes that are not student facing.

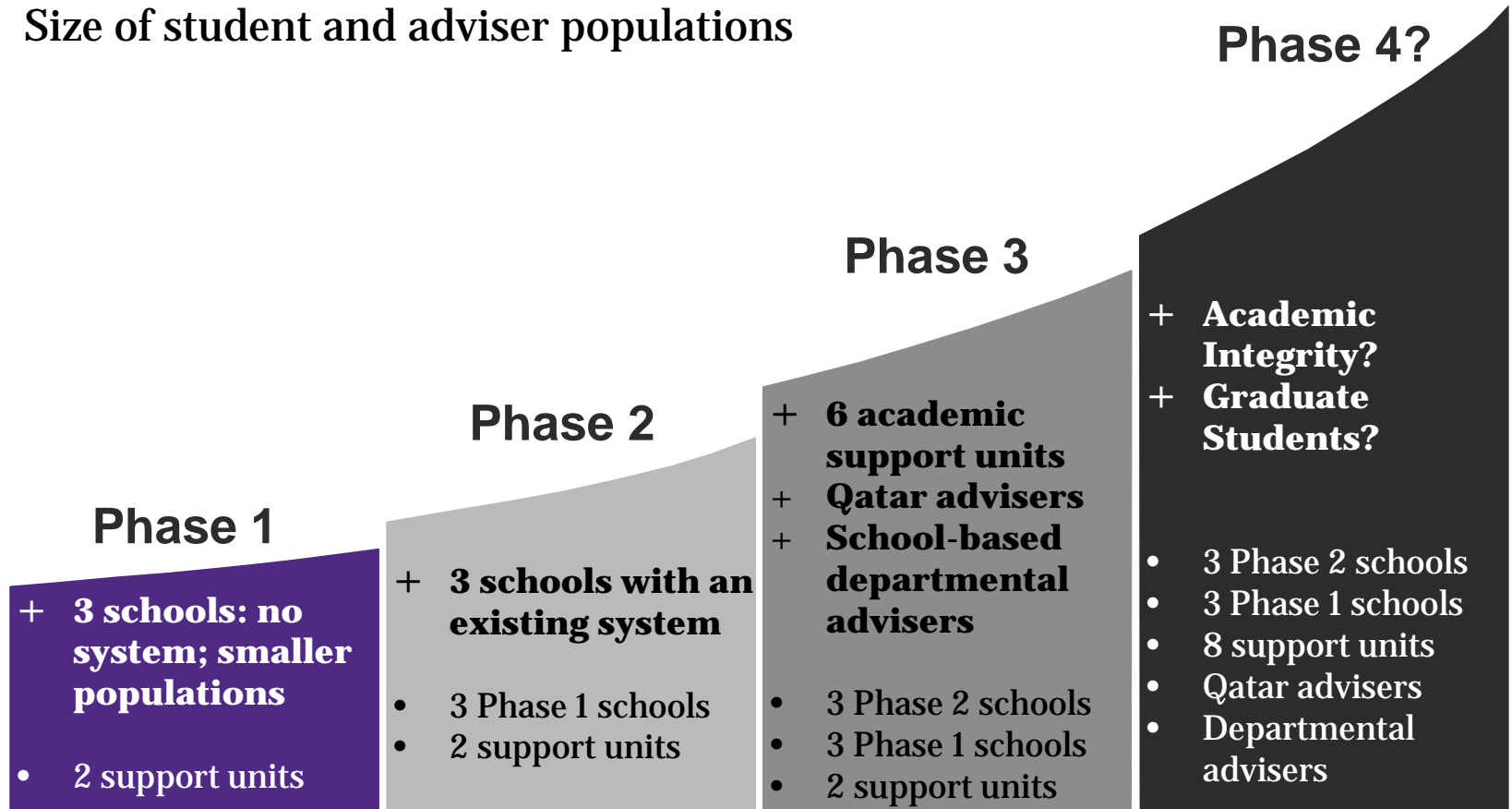
Cross-School Coordination

Emphasize use cases that require coordination across schools or units as opportunities for alignment

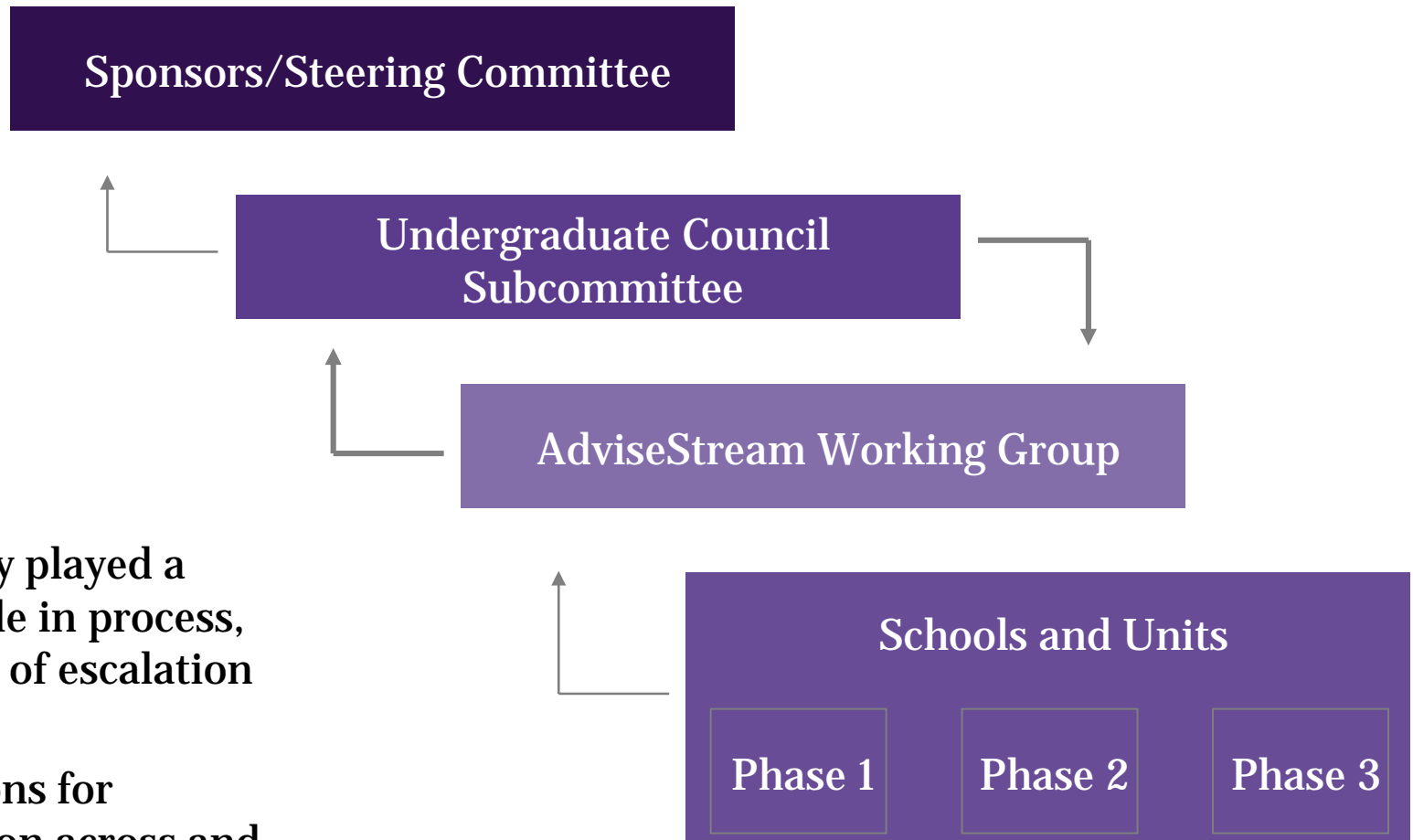
3 Taking a Phased-Approach

Criteria for Phasing

- Current system usage
- Complexity of advising structures and processes
- Size of student and adviser populations



4 Establishing Clear Governance



- Each entity played a defined role in process, with paths of escalation
- Expectations for coordination across and “change control” were outlined and adhered to

4 Establishing Clear Governance: Issue Resolution

- *Who can see my students?*
- *What data can they see about these students?*
- *Who can see my notes on my students?*

Student Visibility	Student Demographics	Note-Sharing
<ul style="list-style-type: none">• Processes inter-school transfers	<ul style="list-style-type: none">• Pell Grant Eligibility• Citizenship	<ul style="list-style-type: none">• Visibility across schools• Visibility across adviser types

5 **Managing Change With Intention**

- Sponsor support
- Participant input
- Vendor management
- Managing users' expectations

Discussion question:

- Of the critical factors for success discussed here, are there any that stand out as particularly relevant?
- Are there any you would add?

Critical Success Factors

- 1 Assembling the right team
- 2 Developing guiding principles
- 3 Taking a phased approach to implementation
- 4 Establishing clear governance
- 5 Managing change with intention

Wrap Up/Lessons Learned

- The technology is an enabler not a solution, but it can surface critical considerations
- Sponsorship and clear decision authority was key
- Clarity on our guiding principles and objectives has proven useful overtime—both for issue resolution and setting priorities for the future

Questions?