



WILLIAM & MARY  
**OFFICE OF ACADEMIC ADVISING**

Office of Academic Advising Annual Report  
2017-18 Academic Year

Prepared by Shelly N. Laurenzo  
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## Office Overview

The Office of Academic Advising (OAA) is a six-person team under the leadership of the Dean of Undergraduate Studies. The office supports and supplements the faculty advisors to undergraduate students in Arts & Sciences. The staff consists of a faculty director, associate director, three academic advisors, and an administrative coordinator. The faculty director is the liaison for all faculty advisors and leads faculty training and development. The associate director manages the day-to-day operations of the office, supervises the advisors and administrative coordinator, and maintains respectful and mutually beneficial relationships with administrative units across campus. The associate director supports the faculty director to provide leadership for academic advising across campus.

## Mission

The Office of Academic Advising empowers William & Mary students and faculty by providing academic information, advice, and support.

## Team Members

Dean of Undergraduate Studies – Janice Zeman  
Faculty Director – Thomas Linneman  
Associate Director – Shelly N. Laurenzo  
Academic Advisor – Gail Williams  
Academic Advisor – Carmen Crosswell  
Academic Advisor – Dane Pascoe  
Administrative Coordinator – Beth Rothenberger

## Highlights of the 2017-18 Year

*Resolved space issues for staff* – all staff members are now in Swem Library

*Personnel changes* – Conducted two searches to fill vacancies, one to permanently hire the administrative coordinator and another to fill an advisor vacancy. The OAA hosted two interns during this time, Dane Pascoe in Fall 2017 and Danielle Stubbs in Spring 2018. The OAA also brought on a summer 2018 intern, Olivia D'aiutolo.

*First year of associate and faculty directors* In the summer of 2017 a new associate director and faculty director came on board.

*Strengthened and cemented collaborative relationships* – tightened the connections and information sharing among offices and pre-major faculty advisors. Enhanced and built new student services based on positive relationships, including weekly meetings with the associate directors of the Writing Resource Center (WRC) and the Center for the Liberal Arts (CLA) and monthly meetings of the Student Academic Success Initiatives group, comprised of leadership from the OAA, WRC, CLA and the deans of undergraduate studies and educational policy.

*Student Data* - Charged with shift to from re-active and remedial approach toward a strategic and coordinated delivery of services for the benefit of all undergraduate students. Through Shelly's selection to serve on the CRM committee and our office's collaboration with IT on Qlik, the OAA is utilizing student data to ensure all students are served swiftly and efficiently.

From the time an incoming freshman or transfer student is admitted to the undergraduate program through their graduation, the OAA supports students' academic success.

## Incoming Students

Before incoming students arrive on campus, the OAA works collaboratively with the Office of First Year Experience (FYE) to gather data about students. We use that information to:

- Match incoming freshman students to a pre-major faculty advisor (May and June)
- Provide supplementary information to faculty advisors about their assigned advisees (initial faculty advising meetings in August)

We provide similar services to incoming transfer students. Because the transfer experience follows slightly different paths, they are described separately below.

In 2017-18 we matched 1611 incoming freshman students and 181 incoming transfer students and facilitated their first meetings for the year with their faculty advisors.

## College Studies

By the end of June we have assigned incoming freshman students to small groups of Peer Advisors who will assist and advise them in complete Part 1 of College Studies, an online short course designed to introduce incoming students to academic life. Every incoming freshman student is required to complete Parts 1 and 2 of this course as a condition of registering for fall courses. In 2017-18, the majority of incoming freshman students completed the course successfully in the scheduled time frame (98 percent). Transfer students are advised to take the course, but completion is not required.

*About College Studies.* This collaborative effort is funded through the Center for the Liberal Arts, project managed by Lori Jacobson, associate director for the Writing Resource Center, supported by Paul Showalter in Swem Library, and delivered by the OAA, with assistance from the OAA's Peer Advisors.

Shelly and Lori met multiple times in the fall and spring semester to finalize the summer 2018 version of Part 1. This year consisted of mostly minor updates to the content. With the assistance of Dane, the quiz questions were updated and a new assessment was put in place.

In Spring 2018 the College Studies team implemented a usability study (reported separately) to ensure that the information presented is clear and useful. The OAA worked with FYE to input College Studies pretest questions in the New Student Inventory. Shelly and Lori also worked with University Web & Design to replace the previous liberal arts statement provided by President Reveley with a new video including representation from incoming President Rowe.

*About the Peer Advising Program.* Gail Williams serves as the peer advising program coordinator. This is a year-round role, which includes training and student development, working collaboratively with the executive board, and recruiting. In 2017-18, Gail recruited four new executive board members and 105 new student peer advisors (PAs). She provides both in-person trainings and virtual trainings through Blackboard. Janice, Lori, and Paul all took part in the spring training of the PAs to ensure

they understand the importance of College Studies and the PAs' vital role in implementation. Gail has also expanded the PA program to allow for student appointments during the academic year.

### Faculty Advisor Training

During the late summer, the faculty director and associate director plan and develop a training session hosted for the pre-major faculty advisors. In 2017-18 Tom Linneman led two training sessions: one for new advisors (45 attended) and one for returning advisors (140 attended). This year Carmen also hosted two short training sessions for transfer advisors.

Throughout the year, the OAA notifies pre-major faculty advisors of timely information related to their advising roles. Near the conclusion of the 2017-18 advising season, the OAA provided a free popsicle stand outside Ewell Hall as a thank-you event, attended by around 50 faculty advisors.

### Orientation Activities

During the fall (and spring) student orientation, the entire OAA team is spread around campus leading presentations, advising in small groups, and sharing information with families. The Peer Advisors assist students during their first registration period. Our academic advisors are on standby to serve students who may need additional support. We also help to smooth and adjust any difficulties that arise with the required initial meetings between students and their pre-major faculty advisor.

## Current Students

### Student Appointments

Throughout the year, OAA advisors are available assist new and continuing students in their academic planning.

The majority of students coming in for appointments are pre-major. Their concerns range from adjusting to new academic requirements, decision-making support, and advice on how to declare a major. OAA advisors play a vital role in serving as back up and additional support for our faculty advisors, especially in a student's sophomore year (23 percent of total student appointments). Typically students are between advisors during their sophomore years, as they are not required to meet with their pre-major advisor and have not declared their major yet. OAA advisors are available to serve that gap.

About 40 percent of student appointments are juniors and seniors consulting on a variety of issues, including graduation requirements.

Unfortunately, with the disruption of staff offices and registration processes, we do not have complete data on 2017-18 student appointments. The data cited above is from September 2017 to May 2018. The dataset is presented and summarized in Appendix A.

### Workshops and Presentations

Advisors presented to both the general student population and specific student groups throughout the year. The content and timing of presentations is coordinated with collaborating administrative offices across campus. In the coming year, the OAA will conduct a needs assessment to determine the programming needs of our students.

In 2017-18 we gave these presentations:

- New Student Athletes, Intro to Academic Advising at W&M presented by Gail Williams, July 2017.
- Transfer Students, Navigating W&M presented by Carmen Crosswell, September 2017.

- Transfer Students, Choosing a Major presented by Carmen Crosswell, September 2017.
- Freshmen and Sophomores, three guest presentations on Choosing a Major as a part of the Cohen Career Center's MACE program by Shelly Laurenzo, September 2017.
- Freshmen and Sophomores, Declaring a Major presented by Gail Williams, October 2017.
- Freshmen and Sophomores, Majors, Milk, and Cookies, co-presented with the Cohen Career Center by Shelly Laurenzo, October 2017.
- Undergraduate Studies, guest presentation on Understanding Midterm Grades as a part of a Writing Resource Center workshop by Shelly Laurenzo, November 2017.
- Freshmen and Sophomores, three guest presentations on Choosing a Major as a part of the Cohen Career Center's MACE program by Shelly Laurenzo, February 2018.
- WMSURE Students, Declaring a Major presented by Tom Linneman and Shelly Laurenzo, February 2018.
- Transfer Students, Choosing a Major presented by Carmen Crosswell, March 2018.
- Freshmen and Sophomores, What I Wish I Had Known panel on Majors vs Careers co-facilitated with the Cohen Career Center by Shelly Laurenzo, March 2018.

### Majors Fair

On February 7, the OAA hosted a Majors Fair as an opportunity for undeclared students to learn more about other departments and programs on campus. The timing of the event is coordinated before spring registration for the following fall semester's courses. This event replaced an experiment in 2016-17 (InfoMajors) that was scheduled in the fall to allow an additional semester's exploration of courses (spring semester) before declaring a major. At the 2018 Major Fair:

- 30 A&S departments and programs hosted information tables or provided information about their academic programs
- School of Business and Education sent representatives
- 99 students attended (50 of those were freshmen)

### Transfer Student Support

The OAA provides additional support to transfer students.

Shelly serves as the academic advising representative on Team Transfer, a university-wide committee focused on coordinating efforts for transfer student services. One of the projects coming out of this group is the creation of a comprehensive transfer website for prospective and current transfer students. During the summer of 2018, Shelly is working with Kathy Larrieu to finalize this site to launch in August.

For direct student services, Carmen serves as our main point person for transfer and co-enrolled students. From prospective to continuing students, Carmen collaborates with Admissions, the office of the University Registrar, and First Year Experience. In the fall we enrolled 170 transfer students and 50 in the spring. Carmen also coordinates the orientation for co-enrolled students in the fall and spring, working closely with First Year Experience. She presented three workshops specifically for transfer students and met with 226 transfers and 230 co-enrolled students during the year. She provided 21 consultations to the Richard Bland College and Thomas Nelson Community College co-enrollment program coordinators. She made four visits to local Virginia Community Colleges to train advising staff and advise students. She also led a new training for faculty advisors on working with transfer students.

## Other Projects

In addition to our student service and faculty service, the OAA is responsible for a variety of administrative projects.

### Data Analysis

Dane started in his role in January and was quickly able to assist with the OAA's data processes. This role is responsible for reviewing multiple aspects of student data, identifying pressure points, and designed interventions to best serve students. With Shelly and Janice, he was able to quickly produce data and reports on various aspects of students' academic information.

### QLIK

Shelly and Dane have been working closely with IT and the Office of the University Registrar on Qlik, a new data pulling and reporting tool. The hope is that this will allow people to have quick access to the data they need to best assist students as they are moving through their curriculum.

### Advisor Matching

Tom and Dane worked with students and faculty from the math department to revisit the algorithm used to make advisor matches. This new process will be piloted in the summer of 2018. Dane also worked with FYE to refine the OAA's questions in the New Student Inventory.

### Faculty Advisor of the Year

Janice and Tom oversaw the faculty advisor of the year survey. Dane provided the administrative support for this project. The award is presented in August at the faculty advisor training.

### Processing Petitions and Forms

The OAA serves the administrative function for processing Committee on Degree petitions as well as Dean of Undergraduate Studies forms. Beth leads this process of the OAA. On average, Beth processes 300 forms and 500 change of exam forms per academic year. She has also aided in refining the review process and adding a review checklist to forms to ensure proper review and an efficient processing timeline. Shelly worked with Steve Otto to revise and update the forms to be more clear and efficient to process. *(Please refer to Appendix B for the complete COD Report).*

## Professional Advisor Training and Development

In order to maintain current advising and academic information, the OAA regularly seeks training and development opportunities.

Starting in the summer of 2017, Janice invited academic departments to meet with OAA advisors to learn about any curricular or policy changes. The OAA also hosted other departments, including DOSO, ROTC, Financial Aid, and the Washington Program. The OAA meets once a month with members of the University Registrar's office to share information and troubleshoot. Starting in the late spring, the OAA hosts once-a-month advisor professional development meetings to allow advisors to pick different topics to explore.

All advisors and the associate director are members of NACADA. The OAA also started building an internal lending library.

- Gail Williams:
  - Presented at the Virginia Library Association Annual Conference on Librarians as Academic Advisors.
  - Completed the NACADA eTutorial on peer advising programs.
  - Attended VCU's 2<sup>nd</sup> and 3<sup>rd</sup> Annual Advising Conferences.
  - Attended W&M's Sparks Leadership Workshop.
  - Attended W&M's FERPA Overview Workshop.
  - Attended W&M's 2<sup>nd</sup> Annual Diversity & Inclusion Symposium.
- Carmen Crosswell:
  - Completed the NACADA eTutorial on advising undeclared students.
  - Completed the Lynda.com course on computer graphics for advisors.
  - Completed the Canva introductory training.
- Dane Pascoe:
  - Completed the NACADA eTutorial on academic advising theory.
  - Attended VCU's 3<sup>rd</sup> Annual Advising Conference.
  - Attended the Association for Institutional Research Forum.
- Shelly Laurenzo:
  - Completed W&M's Supervisor Institute.
  - Attended ACPA's (College Student Educators International) Annual Convention.

## Retreats

The OAA hosted two retreats this year:

1. Orientation Debrief: After fall orientation the OAA held a half-day retreat to focus on team-building as well as brainstorm ideas and strategies to improve our work in August around orientation and advising.
2. OAA Annual Retreat: After the end of the spring 2018 semester, the OAA held a full-day retreat, which consisted of two parts: team-building and goal-setting. Babs Bengston from Human Resources led a session on Strengths during the morning, and Shelly led an afternoon session to develop goals for 18-19 (listed in Appendix B).

## Looking Ahead

The OAA was focused on cooperation and sustainability during the 17-18 year. There were significant changes in personnel, so it was important to focus efforts on team building. In addition to team building, the office also needed to focus on sustainability, ensuring that processes, procedures, and other aspects of office knowledge were not lost during personnel changes.

Now that the office has completed its first year as a fully formed team, the OAA will be focusing on next steps for the 18-19 year. During the upcoming year the OAA will take the time careful craft next steps to ensure excellence in all areas of academic advising.

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*Appendices*

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APPENDIX A: BREAKDOWN OF STUDENT APPOINTMENTS

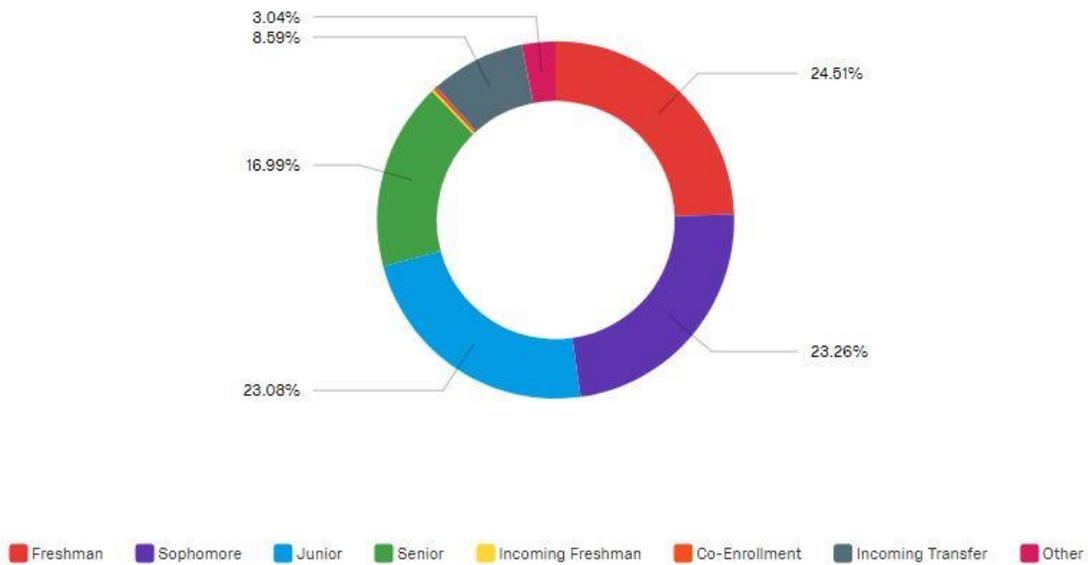
510 Appointments

41 walk-ins

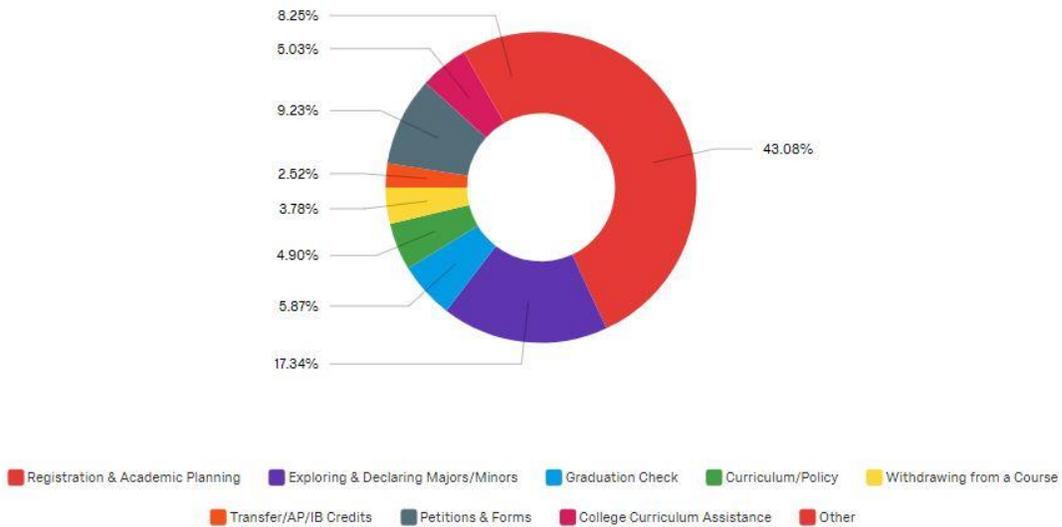
469 scheduled

23% Undeclared (the majority)

Breakdown by student type



Reason for visit





William & Mary  
Arts & Sciences

OFFICE OF ACADEMIC ADVISING

6/28/2018

400 Landrum Drive  
Williamsburg, VA 23185

Greetings,

For the academic year 2017-2018, the following faculty served on the Committee on Degrees: J. Zeman, (Chair) D. Dallaire, M. Harris, L. Losh, I. Novikova. Petitions fall into two categories: 1) course substitutions and 2) policy waivers.

For category 1, 180 course substitution petitions were considered and 173 were approved in AY 2017-2018. The most common requests were to:

- Count non-approved courses toward COLL requirements
- Allow transfer credit to satisfy major and minor requirements
- Allow overlapping courses for major and minor
- Allow courses taken abroad to fulfill degree requirements

For category 2, 56 policy waiver petitions were considered and 53 were approved in AY 2017-2018. The most frequent requests were to:

- Retroactively transfer credit from other universities
- Change/exception in major or minor requirements
- Change grading status-pass/fail and standard grade
- Allow final elective credits to be taken elsewhere

Best Regards,

Office of Academic Advising

## APPENDIX C: 18-19 GOALS

Below are the 18-19 goals, established at the OAA's retreat in May, 2018

**Goal One: Increase efficiency with petitions and forms.**

The OAA, as the administrative function for forms and petitions for the Committee on Degrees and the Dean of Undergraduate Studies, will review options for online processing. The hope is that this would increase efficiency, processing time, and sustainability. OAA will partner with IT, the Office of the University Registrar, and the Dean of Students Office to determine best practices. The goal is to complete a review of options and develop a plan for this year and implement in 19/20.

**Goal Two: Increase focus on specific student populations**

While taking advantage of the increase in data available, the OAA would like to identify students with low major GPAs and develop interventions to best serve those students. The OAA will pilot a strategy for the 18/19 year and review processes for effectiveness in May 2019. Dane will be the point person for this goal.

**Goal Three: Pilot different modes of serving students**

With a desire to serve all students who need support, the OAA will pilot different modes of advising. In particular, the office will investigate different technological options to work with students unable to come to the physical office location. The OAA will pilot these modes in 18/19 and review the effectiveness in May 2019.