AARB at WACRAO

From Ad hocery to Organized Chaos: Advisors, Enterprise Architects, Registrars and Technologists working together to improve undergraduate advising

Thursday, November 8, 2012
10:45am – 11:45am
Introductions

Scott Owczarek
University Registrar, Division of Enrollment Management

Jim Phelps*
Enterprise Architect, Division of Information Technology

Jeffrey Shokler*
Assistant Director for Advising Technology and Assessment,
Office of the Director for Undergraduate Advising
About UW-Madison

• Founded in 1848
• Total Research Expenditures: #3
• Total Students: 42,441
  • Undergraduate (28,737)
  • Graduate (9,251)
  • Professional (2,823)
  • Specials (1,630)
• Total Schools and Colleges: 13
• Number of Degrees Awarded Annually: 10,099
Five Years at Madison
Angst

"Go and plant trees, or do something worthwhile!"
Madison Initiative for Undergraduates (MIU)
Advisor Notes System and MIU Task Force
Advising Architecture Review Board (AARB)
Advisor Core Diagram

Advisor Experience
- Get Training
- Discover Pool
- Arrange Contact
- Gather Data Past
- Present
- Future
- Build Relationships
- Provide Advice
- Record Contact
- Follow-Up

Core Services
- Degree Audit Service
  - Current Report
  - What If
  - Batch DARS
- Reporting Services
  - CALS/Eng Query System
  - Query Library
  - Ad hoc queries
- eMail Service
  - Advisor List
  - Advisee List
  - Email
  - Custom email lists
- Imaging Service
  - Admission Application
  - Transfer Application
- Calendar Service
  - Scheduling Assistant Calendar
- Advisor Notes Service
  - Advising Notes
- Communication Services
  - Websites
  - Printing
  - WiscChat, Chat email

Student Information Service
- Class Search
- Enrollment
- Transcript
- Holds
- Advisor Center
- Prospect Table

Administrative Pipeline
- HR
- Assign Advisors
- Manage Advisees
- Scheduling
- Analytics
- Evaluation
- Curriculum Development
- Professional Development

Jim Phelps, July 27 2011, Version 1.2 Final
Director of Undergraduate Advising
Critical Success Factors

• The right people at the table
• Key retirements
• Maturity of the moment
• Buy-in and support from leadership
• Building on a win
AARB - Members

- Catherine Farry - L&S
- Scott Fullerton – DoIT
- Karen Hanson – RO
- James Helwig - DoIT – AT
- Linda Jorn – DoIT - AT
- Kathryn Lindemann – SOHE
- Annette McDaniel – CFYE
- Scott Owczarek (Co-Chair) – RO
- James Phelps – DoIT
- Sarah Pfatteicher – CALS
- Jeffrey Shokler (Co-Chair) - L&S Honors
- Kendra Abel L&S
- Timothy Walsh – CCAS
- Michelle Young - RO
Building the AARB

• Community buy-in and shopping the idea
• Build on existing governance
• Role of the Enterprise Architect
How we use the AARB
How we now guide technical decisions
### ARB Initiative Review Matrix v1.1

<table>
<thead>
<tr>
<th>Impact</th>
<th>Question 1</th>
<th>Question 2</th>
<th>Question 3</th>
<th>Question 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who does this impact? How?</td>
<td>Could we get more value?</td>
<td>Could we get the same impact from an existing service?</td>
<td>What metrics would measure its value?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organization</th>
<th>Question 1</th>
<th>Question 2</th>
<th>Question 3</th>
<th>Question 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is the current owner? Is that correct?</td>
<td>Who are the current customers?</td>
<td>Who should be included?</td>
<td>Who owns the communications plan?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sustainability</th>
<th>Question 1</th>
<th>Question 2</th>
<th>Question 3</th>
<th>Question 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>What does this cost to implement &amp; sustain?</td>
<td>Who will support this? What is the burden on staff?</td>
<td>Will is scale? Does it need to scale?</td>
<td>Does this make things more or less complex?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Efficiency</th>
<th>Question 1</th>
<th>Question 2</th>
<th>Question 3</th>
<th>Question 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>What processes does this impact?</td>
<td>Does it simplify them or make them more complex?</td>
<td>Does it meld well with the overall processes?</td>
<td>What metrics would measure the efficiency gains or impact?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Integration</th>
<th>Question 1</th>
<th>Question 2</th>
<th>Question 3</th>
<th>Question 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>What data does this consume and/or produce?</td>
<td>Is this the correct source? The correct use?</td>
<td>Is the data available for others as needed?</td>
<td>What metrics would measure its integration impact?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dependencies</th>
<th>Question 1</th>
<th>Question 2</th>
<th>Question 3</th>
<th>Question 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the dependencies for this effort?</td>
<td>Does this rely on other technology? If so, is it good?</td>
<td>Does this require funding? If so, from whom?</td>
<td>Does this rely on other groups or efforts?</td>
<td></td>
</tr>
</tbody>
</table>
How we use the core diagram
Moving to the CoRA Model
Outreach to projects and scalability
Scenario:
SAM
(SOAR Advising Module)
Scenario: Future Planning
Scenario: Impact(s) of Decisions
Scenario: Training Analysis
Summary

• From weeds to a garden

• From tactical to strategic

• From filling holes to knitting an experience
Questions?

Thank You!

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For more information:

https://wiki.doit.wisc.edu/confluence/display/AARB/Home