Office of the Registrar

Strategic Plan
2003 – 2008

September 2003
(Envisioned in January, published in September, updated regularly)
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**Working Documents** - The Office of the Registrar has internal working documents such as an action items worksheet and a planning calendar to regularly monitor the progress of this plan. For more information, please contact Joanne Berg, Registrar, at (608)262-3964 or Joanne.berg@mail.rgstr.wisc.edu
Office of the Registrar
Strategic Plan

Introduction
The Office of the Registrar consults with and provides information and services to students, faculty members, academic departments, administrative units and dean’s offices. Over the past few years, the Office has felt enormous pressure to maintain a balance between providing traditional services while taking a proactive approach to technological advances and opportunities. This search for balance represents a huge cultural shift in defining how work gets done, who does the work, and how we communicate what it is we are doing. In many ways, the challenges presented by this cultural shift have forced the Office of the Registrar to take a new path. Along the way, we are learning to work with competing software vendors, external consultants, emerging campus organizational changes, internal staffing issues, campus political decisions and institution-wide financial constraints.

The strategic planning information that follows outlines our efforts to chart a new path in response to the future needs of the campus community.

The Office of the Registrar, located in the A.W. Peterson Building on the east end of campus, is a unit within the Division of Student Affairs.

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History

Life can only be understood backward, but it must be lived forward.
- Niels Bohr (1885-1962)

The year 1887 saw William Dixon Hiestand appointed to the position of Registrar at the University of Wisconsin. At the time of his appointment, Mr. Hiestand was President Thomas C. Chamberlain’s private secretary. He had a desk in the corner of the president’s office. For a time, Mr. Hiestand also doubled as the Secretary of the Faculty. These two offices represented the first purely administrative entities created to support what was becoming a university. Mr. Hiestand became a respected figure on campus and among his colleagues across the country. He was active in the American Association of Collegiate Registrars and served as first vice president of the Association in 1917-19. George C. Sellery, the long serving dean of the College of Letters and Science, listed Mr. Hiestand among nearly fifty outstanding faculty members who served the University during the administration of President Charles R. Van Hise (1903-1918). Mr. Hiestand died in office in 1925 after serving as registrar for 37 years.

The second registrar, Frank O. Holt, was appointed in 1927 by President Glenn Frank. Mr. Holt had been a school superintendent in Janesville and believed strongly that every academically qualified youth should have an opportunity to attend the state university. Under Mr. Holt’s leadership, the Office...
underwent a major reorganization. In conjunction with Professor V.A.C. Henmon, an educational psychologist, and in line with the vision of President Frank, the Bureau of Educational Records and Guidance was established as part of the Registrar’s Office. It was thought that direct access to student data would improve the quality of academic advising. For his part, Mr. Holt valued better articulation between the high schools in Wisconsin and the state university. He tirelessly traveled the state to promote the university and to encourage people to think of it as their own. To help new students adjust to university life, Mr. Holt designed Freshmen Days as an orientation program. When he left the registrar’s position in 1935 to become Dean of University Extension, the Office was on a firm footing.

A major challenge for the Office and indeed for the University occurred as World War II was winding down and ex-GIs were coming back into the classroom. In the fall of 1946, enrollment doubled to 18,598, putting a great strain on facilities and processes. In 1947 the Office of the Registrar moved from the first floor of Bascom Hall to a basement area known as B-3. Unit record equipment and the ubiquitous punch card were introduced in 1947 as well. When sorted, punch cards made dissemination of student data to offices much easier. By 1957 under the direction of Registrar Paul L. Trump, the first summer orientation program for new freshmen was established. This was the forerunner of SOAR. A year later, 1958, continuing students could register in advance for the fall semester for the first time. These developments were in line with Mr. Trump’s vision of providing better services to students and to the campus community. The year 1962 saw the arrival of the first computer for registrar use, an IBM 1401. Initially, this computer was shared with the School of Commerce.

In 1977 Registrar T.H. Hoover announced the development of a Terminal Oriented Student Academic Records System (TOSARS). This system allowed authorized personnel to view student records on-line and provided the Registrar’s Office with update capabilities by means of a series of specifically designed transactions. Under the leadership of Registrar Don Wermers, UW-Madison abandoned its quaint but effective in-person registration process in 1988 in favor of an interactive voice response system that soon became known as Touch Tone registration. It was immediately popular with students.

By 1996, the University had agreed to the purchase of vendor-designed software (PeopleSoft) for the resolution of the Y2K problem and to better manage student and curricular data. Years-old homegrown computer applications and transactions were replaced with an integrated database in a Windows environment. In September 2002 the Office eliminated Touch Tone registration and celebrated a successful move to 100% web enrollment via the My UW-Madison portal. The move was initiated by an unprecedented public relations campaign for students to “Get Your Ducks In A Row Online.” The campaign sponsored colorful posters, advertisements on the sides of city buses, building banners and the placement of thousands of little rubber ducks all over campus.

Our vision for how the future will unfold for the Office of the Registrar is outlined on the next few pages. We believe that our vision defines a new path of excellence in supporting the academic mission of the university.

Special thanks to Thomas L.W. Johnson for authoring this piece on the Office of the Registrar history.

See Appendix B for history of Registrar appointments.
**Our Mission is to ensure the integrity of curricular and student records.**

*We fulfill this mission by linking students, faculty and staff with information and services that support and enhance the educational experience.*

### Office of the Registrar

**The Administration** oversees all operations of the Office of the Registrar providing overall leadership and office policies; maintains central subject and personnel file; processes payrolls; provides employee benefit information; and manages office fiscal activities.

**Auxiliary Services** provides support services for office operations including campus and first class mail services; DoIT output distribution; package receipt and dispatch; document copy and preparation services; forms and materials inventory, retrieval and distribution; and sales credit billing.

**Customer Service** facilitates processing of official transcripts, enrollment and degree verification; serves as an information clearinghouse for students, the campus community and the general public; coordinates compliance with the Family Educational Rights and Privacy Act (FERPA); and provides veteran services.

**Enrollment Services** determines residency for tuition purposes; manages course enrollment; and assesses tuition and fees.

**Information Services** coordinates, modifies and enhances technological services for the Office of the Registrar to ensure efficient and effective service; serves as the primary liaison to DoIT; coordinates the production of student-related institutional statistics and reports; supports LAN functions and desktop support; maintains the Office website; manages ISIS security procedures; and coordinates the development and maintenance of ISIS functions.

**Student and Alumni Records** serves as the campus resource for student and alumni academic record information; coordinates degree audit and posting; issues diplomas; and ensures athletic eligibility.

**Timetable and Classroom Scheduling Services** maintains the curricular database; publishes class and exam schedules; manages course sections to facilitate enrollment; schedules campus classrooms for courses and special events; contributes to university course catalogs; and meets reporting requirements to campus and UW System.
Envisioning the Future (2003 - 2008)
Laying the groundwork for our path to the future involves working within a set of operating principles and values that support our seven Strategic Goals.

Operating Principles and Values

We are, first and foremost, a service organization

We uphold the integrity of the student record by ensuring campus compliance with the Family Education Rights and Privacy Act (FERPA)

We are innovative in how we use technology

We engage in creative thinking and risk taking

We measure what we do and we link it to our strategic goals

We strive to listen to - and meet - the needs of the campus community

We strive to communicate with each other and with the campus community in a timely, friendly, and effective manner

We foster an environment of fun, acceptance, energy and enthusiasm

We share responsibility for internal health and well-being

We trust each other to be honest and professional

We ask “what is the worst that can happen”

Strategic Goals

1. Automate processes to increase efficiency
2. Increase expert base
3. Define and promote our role on campus
4. Deliver “Wow” customer service
5. Develop fiscal plan to support our vision
6. Foster a positive work environment with shared vision
7. Create a well-planned physical environment
### Strategic Goals and Action Items

<table>
<thead>
<tr>
<th>Strategic Goals</th>
<th>Action Items</th>
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<tbody>
<tr>
<td>1. Automate processes to increase efficiency</td>
<td>Academic Load for Sevis and Clearinghouse Activities “transcript”</td>
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<td></td>
<td>Alumni records</td>
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<td>Authorization processes</td>
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<td>Back-dating</td>
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<td>Decommissioning of mainframe</td>
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<td>E-calendar use within Registrar’s Office</td>
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<td>E-class rosters</td>
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<td>E-forms</td>
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<td>E-grading</td>
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<td>E-mail policies and procedures</td>
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<td>E-storage of admission applications</td>
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<td>Imaging</td>
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<td>ISIS Self Service Applications</td>
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<td>My UW-Madison applications</td>
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<td>Service Indicators</td>
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<td>Study Abroad department</td>
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<td>Timetable process</td>
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<td></td>
<td>Transfer data to athletic database</td>
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<td></td>
<td>Workflow</td>
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<tr>
<td>2. Increase expert base</td>
<td>Cross-training</td>
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<td>Desk-top support</td>
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<td></td>
<td>Leadership/Management training</td>
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<td></td>
<td>Technical training</td>
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<tr>
<td>3. Define and promote our role on campus</td>
<td>Alumni Services redefined (see Alumni Records)</td>
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<td></td>
<td>FERPA training and promotion of privacy rights</td>
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<td>4. Deliver “Wow” customer service</td>
<td>Campus Copy “transcripts”</td>
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<td>Larger diplomas</td>
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<td>Official transcript requests</td>
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<td>Phone routing system</td>
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<td>Self-service booth</td>
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<td>Self-service applications</td>
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<td></td>
<td>Website</td>
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<tr>
<td>5. Develop fiscal plan to support our vision</td>
<td>Development timeline</td>
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<td>Measures (cost/benefit)</td>
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<td>Shadow budget</td>
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<td>6. Foster a positive work environment with shared vision</td>
<td>Communication plan</td>
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<td>Handbook/checklist for employees</td>
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<td>Lobby display - History of Registration</td>
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<td>Performance Reviews</td>
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<td>7. Create a well-planned physical environment</td>
<td>Redefined space needs</td>
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See Appendix F: Supporting the Campus Plan.
Making Connections
Structured collaboration with myriad constituencies is part of the new cultural landscape of the Office of the Registrar. We believe that by strategically collaborating with our constituencies on a number of issues and initiatives, we will be better able to achieve our vision for the future.

Connections

Customers
*UW-Madison Campus:* administrative staff (including deans and directors), advisors, Business Conference Services, Central Reservations, faculty, instructional staff, Physical Plant, students, fellow Registrar’s Office staff.

*Beyond the UW-Madison Campus:* Alumni, employers, financial institutions, legislators, Minnesota Higher Education Service Office, National Student Clearinghouse, parents, prospective students, colleagues at other institutions, scholarship agencies, UW-Foundation, UW-System Administration, Veteran Affairs, Wisconsin Alumni Association (WAA).

Partnerships
The Registrar’s Office has built strong business associations with a number of units across campus. In particular, strong ties exist with the following units (examples of our associations follow each listing):

- Academic Planning and Analysis (*academic planning, institutional reporting requirements*)
- Admissions Offices (*Connections Program, residency for tuition decisions, transfer students*)
- Building Managers
- Bursar’s Office (*tuition billing*)
- Division of Continuing Studies (*Evening and Distance Learning catalog, Summer Sessions Bulletin*)
- Division of Information Technology (DoIT) (*applications technology and middleware, architecture, LDAP, learning technology, My UW-Madison, production services, UDS*)
- Facilities, Planning and Management (*classroom management, maintenance, upgrade and accessibility*)
- Housing (*Learning Communities – reserved class sections*)
- Integrated Student Information Services (ISIS) Central (*ISIS maintenance, Campus Community, training*)
- International Student Services (*SEVIS reporting*)
- International Studies and Programs (*Study Abroad Programs*)
- Legal Services (*FERPA, HIPAA, Safeguarding Law compliance, subpoenas for student records*)
- School and College Deans’ Offices (*course catalog publications, DARS, FIGS, policy interpretation and enforcement*)
- Secretary of the Faculty (*commencement activities, Divisional Committee activity*)
- Student Financial Services (*expected graduation term, institutional collaborations, veterans benefits*)
- Student Orientation Office (*information to parents, SOAR*)
- University Communications (*Timetable, Graduate and Undergraduate Catalog publications*)
- UW Athletics (*NCAA and Big 10 Eligibility*)
- UW Foundation (*alumni records*)
- UW Police Department
- Wisconsin Alumni Association (WAA) (*alumni records*)
- Wisconsin Union (*Photo ID/service eligibility*)
Committee Involvement
Through committee participation and leadership, we build relationships with campus colleagues and contribute to building the future of the University. Committee roles include membership, non-voting consultants, and frequent guests/advisors.

Administrative Processes Group (Data Warehouse and Query Library subcommittee) | ISIS – Security
Adviser Data (AAC subcommittee) | ISIS – Self Service
Alumni Relations Council (ARC) | ISIS – Strategic Directions
Archives/Retention | ISIS – Tech Forums
Associate Administrative Council (AAC) | ISIS – Training
Athletic Department Advising Groups | Joint Admissions Group
Athletic Department Compliance | Letters and Science Advisers
Connecting for Academic Success (CAS) | My UW– Madison Tab Team Committee
Connections Program Committee | My UW– Madison Academic Tab Team
Council on Academic Advising (CAA) | My UW– Madison Student Record Tab
DARS Encoders | Team
Degree Revocations (ACC subcommittee) | Non-Resident Tuition Appeals Committee
Distance Education Committee | Photo ID Committee
Division of Student Affairs – Campus Life Team | Plan 2008
Division of Student Affairs – Diversity Team | Portal Requirements Team
Division of Student Affairs – Directors | Priority Enrollment Criteria (AAC Subcommittee)
Division of Student Affairs – Director’s Policy Group | Retention Data View Committee
Division of Student Affairs – Peer Recognition Awards Committee | SEVIS
Freshman Interest Groups (FIGS) | SOAR Leadership Team
General Education Technical Committee | Space and Remodeling Policies Committee (SRPC)
Graduate Coordinators | Summer Sessions Dean’s Council
International Entry Delay Task Force | Transfer Student Committee (AAC Subcommittee)
Integrated Campus Coordinating Committee (ICCC) (AAC Standing Subcommittee) | University Academic Planning Council (UAPC)
ISIS – Campus Community | University Directory System (UDS)
ISIS – Change Management | University Relations
ISIS – Coaches | UW-System – Collaterals
ISIS – Executive Committee | UW-System – Help Office
ISIS – MMT | UW-System – TIS
ISIS – NSYNC | Web CT/Desire 2 Learn (Learn @ UW)
ISIS – PMC

Professional Associations
• American Association of Collegiate Registrars and Admissions Officers (AACRAO)
• College and University Computer Users Association (CUMREC)
• Committee on Institutional Cooperation (CIC) Registrars
• Council on Law in Higher Education (CLHE)
• Higher Education Users Group (HEUG)
• University of Wisconsin System Registrars
• Wisconsin Association of Collegiate Registrars and Admissions Officers (WACRAO)
• Wisconsin Higher Education PeopleSoft Users Group (WHEPSUG)
**Vendors**
Several collaborations external to the University have been forged with software vendors and the like. These agencies are listed below. Relationships with other institutions using the same or similar services have also developed. We collaborate with these agencies and institutions to discuss implementation, maintenance, security and future upgrade possibilities. Our connections are facilitated through list-serves, annual conferences, phone consultations and negotiations.

- CollegeNet
- Degree Audit Reporting System (DARS)
- National Student Loan Clearinghouse (NSLC)
- PeopleSoft (ISIS)
- Perceptive Vision, Inc.

**Internal Work Groups**

**Imaging Team** coordinates the implementation of the new imaging system in the Registrar’s Office.

Marilyn McIntyre – Chair  Carol Brandl  Jenny Hefty  
Matt Yeakey (Technical Lead)  Donna Markgraf  Bill Sebert

Office of the **Registrar Self Service Team** reviews student records functionality in PeopleSoft Self-Service, customizing delivered functionality or creating new functionality as needed.

Marilyn McIntyre – Chair  Karen Hanson  Jim Steele  
Jene Atkinson (Technical Lead)  Aaron Reiff

**Professional Development Committee** develops, coordinates, facilitates and communicates professional development opportunities to the Registrar’s Office staff. The committee meets on a monthly basis to discuss professional development opportunities, prepare professional development communication materials, and to discuss and plan office-wide presentations.

Mary Narkis – Chair  Dave Abelman  Joanne Berg  
Mary Bingham  Carol Gosenheimer  Marilyn Strouse

**The FISH! Embassy** develops and coordinates activities to create an atmosphere of fun and congeniality, promote cohesion within our work groups and interaction among ourselves, while working toward establishing an environment conducive to “wow” customer service.

Joan Evans – Ambassador  Cari Anderson  Mary Bingham  
Kathleen Cummings  Sue Dolfin  Jenny Hefty  
Rosie Lovelace  Marilyn Strouse  Margie Whalen

**Web Team** coordinates web content management, develops and coordinates adherence to standards, initiates periodic reviews of the website and ensures that the content is user-friendly and accessible.

Aaron Reiff – Chair  Dave Abelman  Jene Atkinson  
Randy Black  Sue Dolfin  Phillip Hull  
Michelle Kelly  Kari Smith  Matt Yeakey
Strategic Planning – Roles and Responsibilities

Management Team
Responsibilities include ongoing assessment of the strategic goals and initiatives, and planning and participating in annual strategic planning retreat.

Joanne Berg, Karen Hanson, Marilyn McIntyre, Shari Pero, Catherine Sheskey, Jim Steele

Strategic Plan Administrative Team
Responsibilities include making arrangements for annual planning retreat, participating in discussion, and assisting with implementation of initiatives.

Mary Bingham, Kari Smith

Strategic Plan Coordinator
Responsibilities include drafting strategic planning documents and worksheets, working with the Office of Quality regarding the planning process, attending annual strategic planning retreat, and ensuring that the planning documents are kept current and accurate.

Carol Gosenheimer

Facilitator(s)
Individual(s) who facilitate annual retreats and/or other improvement projects or initiatives.

Staff appointment by the Office of Quality

Point People
Individuals that are responsible for ensuring the goal is progressing as planned. Point person has the view of the whole, connects people with each other when their efforts are related. The point person measures, summarizes and reports on progress and may or may not have authority over others involved.

Staff Members
Registrar staff can help the Office to achieve our strategic goals by taking responsibility for understanding and appreciating our operating principles and shared values.

See Appendix A: Organization Chart.
Implementation Strategy

Initial Rollout

Presenting Strategic Plan to Internal Staff – September 2003
- Announce Strategic Plan rollout at All-Staff Meeting.
- Provide copy of Strategic Plan to Office of the Registrar staff.
- Ensure access to Strategic Plan via Web; provide “check out” copies at the central office.
- Discuss the Strategic Plan and Action Items at unit staff meetings. Staff will be asked to consider where we are as an office, how we are doing, what’s missing from the picture, and to think about our accomplishments. In addition, staff will be asked to consider where they see themselves in the plan, and how they are contributing to the efforts.
- Include Strategic Plan information in new employee materials.
- When possible, display goals and visions around office.

Presenting Strategic Plan to Campus – Begins after September 2003
- Communicate information to the campus community via email. Include a link to our Strategic Plan on the web.
- Host campus-wide Forum (listening session) with PowerPoint presentation and summary handout on Strategic Plan.
- Share feedback with campus.
- Present Strategic Plan to Student Affairs directors, AAC and other campus groups, as appropriate.

Monitoring our Progress

In order to successfully implement our Strategic Plan, we have instituted several new checks for monitoring the progress towards reaching our goals.

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<th>Checks</th>
<th>Responsible Parties</th>
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<tr>
<td>Weekly Updates and Progress Checks</td>
<td>Management Team</td>
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<tr>
<td>Weekly Monday Strategy Sessions</td>
<td>Management Team</td>
</tr>
<tr>
<td>Weekly Unit Calendar Checks</td>
<td>Unit Managers, Staff</td>
</tr>
<tr>
<td>Monthly Updates</td>
<td>Management Team, Coordinator, Administrative Team</td>
</tr>
<tr>
<td>Quarterly Review of Progress</td>
<td>Management Team</td>
</tr>
<tr>
<td>Bi-Annual All-Staff Meetings</td>
<td>All Registrar’s Office Staff</td>
</tr>
<tr>
<td>Annual Review and Progress Checks</td>
<td>Management Team, Coordinator, Administrative Team</td>
</tr>
<tr>
<td>Annual Campus Listening Sessions/Forums</td>
<td>All, as appropriate</td>
</tr>
<tr>
<td>Annual Strategic Planning Retreats</td>
<td>Management Team, Coordinator, Administrative Team, other invitees as agenda dictates</td>
</tr>
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Appendix B
Registrar Appointments
1887 - 2002

William Dixon Hiestand 1887-1925
C.A. Smith 1925-1926\(^a\)
Frank O. Holt 1927-1935
Curtis Merriman 1936-1945
J. Kenneth Little 1945-1951
W.J. Harris 1951-1956\(^b\)
Paul L. Trump 1956-1962
L.J. Lins 1962\(^a\)
Wayne K. Kuckkahn 1962-1965
Kenneth G. Kalb 1965-1966
Thomas H. Hoover 1966-1985
Thomas L.W. Johnson 1985\(^a\)
Donald J. Wermers 1985-1998
Monty E. Nielsen 1998-2002
Joanne E. Berg 2002- Present

a) Smith, Lins, and Johnson served as Acting Registrars for the dates listed.
b) From the fall of 1951 to the Fall of 1956, the University did not have a Registrar by that title. W.J. Harris served as Director of Registration and Records under Registrar Little. When Mr. Little became Vice President of Student Affairs and relinquished the Registrar position, Mr. Harris became the functional head of the office and continued as Director of Registration and Records.
Appendix C
Registrar’s Office Listening Sessions Invitation
October, November 2002

The following communication was emailed to Advisor-Link, all ISIS users, Deans, Directors, School/College Administrators and Department Chairs. They were encouraged to share the invitation, as appropriate.

You're Invited...Registrar's Office Listening Sessions

What is a listening session? You tell us what you need, want and expect from the Registrar's Office. We listen.

Why are we hosting these sessions? Given the limitation of time and resources, we want to hear what you think is important for us to be working on so that we can begin to prioritize the activities and projects that should be initiated to meet your expectations. Whether you are faculty, dean, adviser, student service professional or administrative assistant, you play a key role in the student experience at UW-Madison. We believe that the Registrar's Office facilitates your role in student life by working to ensure data integrity and provide critical enrollment and academic record services.

The Office of the Registrar has felt enormous pressure to maintain balance between providing traditional (and critical) services while taking a proactive approach to technological advances and opportunities. This search for balance represents a huge cultural shift in defining how work gets done, who does the work and how we communicate what it is we are doing. Your participation in the listening session will help us to steer campus priorities for what happens next with, for example, ISIS, the My UW-Madison portal for students, faculty and staff, the data warehouse and the query library.

We are hosting four listening sessions. Two of the sessions will focus on the needs of advisers and instructors, and two of the sessions will focus on administrative and student services. We hope you'll find some time to join us. Register on line at: http://listen.registrar.wisc.edu.

Adviser and Instructor (teaching faculty) Services
Thursday, October 17 8:30 – 10:00 a.m.               Friday, November 15 2:00 – 3:30 p.m.

Who should attend?
Anyone interested in degree audit and academic progress services, grading practices and procedures (are we ready for e-grading campus-wide?), enrollment services, classroom assignments, academic planning, data analysis, course roster information and distribution. If there is something else you would like to add to the list of possible discussion topics, we ask that you please note it on the registration form.

Administrative and Student Services
Wednesday, October 23 10:30 – noon                   Thursday, November 14 2:00 – 3:00 p.m.

Who should attend?
Anyone interested in enrollment services, diploma services, tuition and fee assessment, timetable production, transcript services, student and alumni record production and maintenance, official information for the UW-Madison Catalogs, data services, and certification of academic progress among other things (please make a note on your registration form if you have additional areas of interest that you would like us to cover).

On behalf of the entire staff in the Office of the Registrar, I hope you will find some time to join us. However, if the time(s) noted here are not convenient and you would still like to share your thoughts with us, feel free to call or email me directly.

Thank you for your time,
Joanne E. Berg

Office of the Registrar, Strategic Plan 2003-2008
Division of Student Affairs, University of Wisconsin-Madison
Appendix D
Registrar’s Office Listening Sessions Summary
December 2002

Late this fall the Registrar’s Office hosted listening sessions to learn what campus expected of our office. We were very pleased with the level of campus participation and willingness to provide meaningful feedback. We started out the sessions by asking participants to give us adjectives describing an ideal Registrar’s Office. The adjectives described most frequently are listed here:

- Accessible
- Accurate
- Aware
- Efficient
- Friendly
- Helpful
- Informative
- Integrated
- Responsive
- Transparent
- Visionary

After this brief look at the ideal, we asked participants to discuss some issues in smaller groups. Here are the general categories of topics discussed in the groups:

Academic Planning
Collaborative programs

Accessibility Issues
Adviser "link" to student records
Access to records (security)
Authorization to ISIS

Customer Services
List of who does what in Registrar's Office
Phone routing system
Students can't differentiate among Peterson Offices
Help students understand how the institution works
Understanding student needs
Electronic forms
E-everything
The web page is hard to find through the UW-Madison home page
Finding forms on the web is difficult
Too much work going to department staff
One-stop shopping through MUM
More customer-oriented hours

Data
ISIS Data matching Warehouse Data
Query Library
Registrar’s Office Listening Sessions Summary (continued)

Enrollment Services
SWAP (short period of time)
How ISIS affects course enrollments (e.g., audits don’t show up in low enrollment classes)
Faculty notification of when students drop a course
Study Abroad
Transfer Students

Grades
Electronic grading
Six-Week Grades

Records
Transcripts
Campus-copy transcripts (student records)
Discreet transcript for different levels (e.g., grad & professional)
Degree audit/DARS
DARS format on-line
Student/Alumni records
Academic achievements in DARS
Major and degree codes
Timeline for when "major declaration" to appear in DARS
Academic Advisement module in PeopleSoft
Expected graduation term report

Timetable Production
More roll-over for cross-listed courses and all (honors and instructors (IND))
Need more support for TT reps
We should be able to submit forms online
Roll forward 990 - authorizations and permissions
Be able to do more ourselves - less forms

Training
Adviser training (overall) - want resource groups, advising coaches
Training for ISIS
Data Services (printer-friendly)

Thanks to all of you who participated in our listening sessions. The Registrar's Office management team has carefully evaluated what we heard at the listening sessions and has begun the strategic planning process. We very much look forward to sharing a draft of our plan with you and to engaging in continuing dialogue about how your needs and expectations are being addressed by our office. If you have questions or comments, please do not hesitate to contact me directly.

Joanne E. Berg, Registrar
Appendix E
Registrar’s Office Planning Retreat Agendas

Registrar’s Office Strategic Planning
January 22, 2003
Room 205, Pyle Center
7:45 a.m. - noon

7:45 a.m. Arrive
8:00 a.m. Welcome and Overview of Agenda
Re-examining our mission and vision
8:10 a.m. Warm-up
8:30 a.m. Revising the Registrar’s Office mission statement (our fundamental purpose, not what we do).
9:00 a.m. Creating a vision for the Registrar’s Office - what will we look like in 2008?
11:00 a.m. Defining measures of success for our vision - how will we know we’re achieving our goals, reaching our vision?
11:30 a.m. Does our mission statement work with our new vision?
11:45 a.m. Next steps
12:00 p.m. Adjourn

Handouts
2001-2002 Annual Report
Registrar’s Office Planning Retreat Agendas (continued)

Registrar’s Office Strategic Planning
January 30, 2003
Room 205, Pyle Center
1:00 – 4:30 p.m.

1:00 p.m. Review Mission and Vision
Please note how the mission and vision fit within the context of what was heard at the Listening Sessions

What are the goals we need to accomplish in the next calendar year?
 Prioritize
 Assign Point People
 Assign a “check-date”

3:00 p.m. Discussion: how to roll-out the plan
What are we doing now that works?
How can we build on these things to roll-out the strategic plan?
What are our values, operating principles?

4:00 p.m. Wrap-up
What are we going to do differently because of this exercise? How will we know?

4:15 p.m. Next steps
The Office of the Registrar provides infrastructure and guidelines for myriad student and faculty services that support and enhance the academic mission of the university.

The table below shows how the Office of the Registrar supports each of the Campus Priorities through our achievements, future plans and strategic goals.

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<td>Promote Research – Invigorate &amp; Expand Student Educational Opportunities</td>
<td>Collaborated with the Division of Continuing Studies and the Morgridge Center for Public Service to promote extended day/distance learning courses and Service-Learning courses, respectively, through better data collection, and more visible Timetable listings.</td>
<td>Roll out Mode of Instruction to allow students to more easily search for distance education courses  Support Capstone and certificate programs</td>
<td>Automate processes to increase efficiency  Deliver “Wow” customer service</td>
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<td>Advance Learning</td>
<td>Enhanced SOAR presentations to parents and students  Allowed access to student records through My UW-Madison for individual students and advisers  Improved Customer Service area – easier access for all students  Athletic Eligibility position filled to ensure compliance with NCAA and Big 10 eligibility rules  Hosted Listening Sessions</td>
<td>Build an early-alert system for faculty to allow electronic notification to notify students about their academic progress  Develop Activity Report (extra curricular activities)  Expand pilot of e-grading (including interface with D2L)  Launch E-class roster in Fall 2003; eliminate paper rosters  Timetable Improvement Project  • Develop and roll out Timetable Planning Toolkit</td>
<td>Automate processes to make them more efficient  Define and promote our role on campus  Deliver “Wow” customer service  Develop fiscal plan to support our vision</td>
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|                | 100% web enrollment (eliminated touchtone enrollment)  
Enabled enrollment and degree verification through the National Direct Loan Student Clearinghouse  
Provided students with ability to select out of receiving 3rd party email  
Collaborated with L&S to set up FIG offerings, thereby facilitating enrollment during SOAR  
Diversity Efforts (see also separate section on diversity efforts) include hosting an Accented Student Workshop and a workshop about serving disabled students  
Rolled out Self Service Schedule of Classes, including “point-and-click” enrollment  
Trained four staff in PeopleSoft Workflow  
Purchased imaging system in cooperation with the Office of Student Financial Services  
Supported the PEOPLE Program by providing space assignments for pre-college youth programs  
Decommissioned Mainframe applications | • Redefine the timetable process  
• Transition to a paperless Timetable. Resource savings (monetary and environmental) through reduction of printed Timetables  
Customization of our alumni records and eliminating redundant work efforts between the Wisconsin Alumni Association and the UW Foundation.  
Promote awareness of student privacy rights (FERPA)  
Study Abroad “department”  
Implement “Workflow” functionality  
• Final Exam Scheduling  
• Academic Action Processing  
• Withdrawal Forms  
Initiate process to image official records | Accelerate Internationalization  
Collaborated with ISS and admissions offices to implement SEVIS  
Establish Study Abroad “department” to facilitate posting Madison credits for year  
Automate processes to make them more efficient |
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<td>Amplify the Wisconsin Idea</td>
<td>Speaking with Accented Students workshop attended by many RO staff</td>
<td>abroad study and to provide students with a meaningful transcript</td>
<td>Deliver “Wow” customer service</td>
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<td>Awarded a Brittingham grant to do a project on the history of registration. Worked with graphic art students to establish and display project in lobby of A.W. Peterson building</td>
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<td>Define and promote our role on campus</td>
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<td>Changed diploma size from 8 x 6 to 10 x 8 for the May 2003 Commencement</td>
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<td>Develop fiscal plan to support our vision</td>
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<td>Nurture Human Resources – Students</td>
<td>RO staff participated in Sexual Harassment Informational Sessions</td>
<td>Provide more self-service opportunities to students (see section on Advance Learning)</td>
<td>Deliver “Wow” customer service</td>
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<td>Focus on staff development for customer service</td>
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| Nurture Human Resources – Faculty and Staff | Successful implementation of Peoplesoft V8 and Resource 25 Version 3.0  
Established Professional Development Team  
Promoted professional development for all RO staff by hosting several workshops and by providing monthly listings of available opportunities  
Showcase 2002 Poster Session on Professional Development – voted one of top five posters  
Instituted an electronic calendar in Registrar’s Office (use WiscCal). | Provide more self-service opportunities to staff and faculty (see section on Advance Learning)  
Provide professional development workshops and training  
- FISH! Philosophy Workshop  
- Leadership training  
- Technical training (i.e., Workflow)  
Enhance desktop support for Registrar’s Office staff  
Implement performance reviews for all RO staff  
Redefine space needs  
Develop and charge new web management team | Automate processes to make them more efficient  
Create a well-planned physical environment  
Develop fiscal plan to support our vision  
Foster a positive work environment with shared vision  
Increase expert base |