

Self-Study Report Executive Summary

CONFIDENTIAL

Student Support & Advising Enrolment Services



BACKGROUND

A memo sent to staff in September 2011 from the Registrar, ***Names Not Numbers (N3) Project***, set out the vision for a new service model in Enrolment Services. The original vision was of approximately 100 Enrolment Services Professionals (ESPs) who were assigned one-on-one to undergraduate students. ESPs were “trained and authorized to provide a comprehensive range of ES services” (300:1). Through the recognition that students were interacting with ESPs using a combination of in-person and self-service options, the number of ESPs was reduced to 42, and the caseload increased threefold (900:1).

Incorporated into the layer were Enrolment Services Coordinator (ESC) and Associate Director (AD) roles in addition to the Associate Registrar & Director. ESPs report to ADs, and are supported by the ESC team. The ESCs are integral to the effective and efficient work that happens behind the scenes in many facets of the Student Support & Advising unit.

The original vision was strongly driven to ensure students were not being bounced around between units in enrolment services and that they receive a high level of consistent service – this has been achieved. The revised approach reflects a new vision of service for Enrolment Services – one that can provide the desired one-on-one long term relationship connection, while meeting the immediate needs of our student population in a drop-in approach as well.

The Student Support & Advising (SSA) unit, within a span of three years (May 2012—May 2015), in Enrolment Services (ES) has provided system-wide support to UBC’s Vancouver campus current and prospective students. This is a time of opportunity for future potential in the work of the unit and in the role of ESPs at UBC. With the support of an advisory committee comprising staff, faculty and students from across campus, the SSA unit has taken this opportunity to reflect on the last three years by undertaking a self-study. Four intended outcomes were identified at the outset of the self-study:

1. Build a sustainable model that allows the service to maintain and improve service levels for a growing student population and the professional growth of people who work within the model;
2. Identify opportunities and the potential to utilize technology to enhance the service model;
3. Review advising practices within the unit to ensure alignment and shared leadership with colleagues campus-wide;
4. Identify next steps to continue strengthening relationships with students, academic faculties and campus colleagues for effective collaboration.

The advisory committee engaged in a four-month self-study process, reviewing everything from the basic operational structure of the SSA unit’s service points, to the complexity behind award adjudication processes. The committee identified a set of themes specific to the SSA unit, and further analysis of how the day-to-day operational elements, strategic direction and the overall vision impact each of the themes and their success our outlined within each of the following themes.

PEOPLE

With a staffing compliment of 50 people (42 ESPs, 3 ESCs, 3 ADs, 1 Manager (temporary 1-yr contract), 1 Associate Registrar & Director), the SSA unit provides support and services to prospective and current students regarding financial advising, admissions advising, tuition and registration issues, effective campus referrals and other advising matters.

Each of the layers of the organization has unique responsibilities that intersect with one another. The following goes over elements that relate specifically to people development and management. Providing oversight to the whole unit, and shaping the direction of SSA unit, the AR&D has strategic oversight to the processes and policies enacted by the unit; the unit's ADs and manager reports to the AR&D. The ADs provide oversight to hiring, and the ESPs and ESCs report directly to the ADs. ESPs manage training program, incorporating shadowing and mentorship into the program and guide the transition of new staff. ESCs provide primary administrative support to SSA through system access, project support for awards, sponsorship and other projects.

The work of the team (at all levels) is expansive by way of national and international loan systems, to processes at UBC – they also have 3-5 projects in their portfolio, inclusive of award program management and project management with an administrative unit. As a result, it tends to take more than one cycle to gain comfort in any one of the roles.

At the end of the day, finances are the unit's specialty. The SSA unit does a great deal of work in providing general campus advising as well as prospective student advising, but the core specialty is financial advising, and ensuring that the SSA team is kept up to date on this area of responsibility is paramount. Based on the current structure, the following recommendations were made:

- Develop competency profile for the SSA unit and the roles within it
- Review how opportunities for senior ESPs can be attained to create greater engagement in their work
- Review of organizational structure among the levels with a closer view to professional development opportunities, to ensure effective use of people resources to meet stakeholder needs, development and career growth for staff

CAMPUS STAKEHOLDERS

Our campus stakeholders fall into four broad categories: academic advising units, partners involved with prospective student recruitment and admissions, stakeholders with student life and development, and contacts working in student finance. ESPs act as the primary contacts for most campus partners – working in teams ranging from two to eight members. Stakeholder contact varies widely among teams – with some partners requiring daily contact and updates, and others requiring annual follow-up. ADs provide leadership to ESP teams when dealing with complicated issues with campus stakeholders. ESCs work primarily within the SSA Unit, but are responsible for providing external support in the processing of all third-party sponsorship agreements and are an important liaison between ESPs and Student Financial Services. Finally, the AR&D provides support to the ADs in their work with campus partners and works closely with the AMS, GSS and undergraduate society executives to find ways to engage more deeply with students in expanding the service delivery model.

Establishing strong working relationships with stakeholders was identified as an important function of the SSA Unit, and central to the SSA unit's primary mission of providing holistic, student-centred support. The following recommendations were made for strengthening our work with campus partners:

- Enhance the team lead role of faculty specific project teams to ensure better communication and relationships between the SSA unit, faculty members, departmental administrators and the individual faculty advising offices

- Build stronger and more comprehensive practices with OAMS and Early Alert to ensure effective note taking and sharing of information with other advising units across both campuses
- Establish coordinated communication parameters that allow for campus partners (central and departmental based advising offices, in particular) to ensure there is clarity on points of contact and how to best engage with the SSA unit. Consider establishing a way to share points of contact for everything from award program managers to faculty contacts
- Ensure ESPs are trained and equipped by campus partners to set students up for the best possible transition when referring to another external unit on campus

ADVISING CULTURE AND SYSTEMS

A core goal of the SSA Service Support Strategy is: Students – prospective, current and former, alike – receive a consistent and outstanding experience. This means providing service to students how and where they wish to be served.

Flexibility and responsiveness are two core tenets of the work of ESPs as they engage with prospective, current and former students, both domestic and international. The ideal structure of the ESP position sees ESPs spending approximately a third of their time at a service point (interacting with current, prospective and former students) with the remaining two-thirds focused on project work and one-on-one with their own assigned students.

Advising is a practice that occurs at all points of the ESP role – service points, one-on-one meetings and through active outreach. Prospective student advising, financial advising, and transitional advising happen across service points and within our cohorts and through our systems. Certain technology improvements have reduced some of the front-line interactions, such as direct deposit, and the SSA unit anticipates a drop in Advising Centre (AC), in-person use. Limitations in resources still remain, for example in technology, and provide challenges for ESPs to provide real time advising to students in innovative ways (e.g. live chat); the current SISC hinders maximizing the effectiveness of reporting for the SSA unit. The physical separation of the SSA unit between Brock Hall and Irving K. Barber presents some challenges in the duplication of efforts by having two spaces that provide similar services. Based on a review of our current advising systems and culture and the challenges faced within these areas, the following recommendations were put forward:

- Review ways to maximize knowledge base at service points
- Develop tracking method for inquiries at service points, document follow up
- Incorporate direct training from interested faculties in ESP onboarding
- Build practices that reinforce the use and advisement of the wiki
- Manage channels of communication between units to ensure consistency in practice and awareness of workflows
- Explore change organizational model that allows for creation of a role that can triage questions at service points and can maximize the expertise
- Review of continued use of Irving K Barber as an advising space
- Determine if weekly meeting is sufficient in ensuring staff are kept up-to date of changing policies / practices

STUDENT EXPERIENCE AND ENGAGEMENT

As the primary contact with students, the ESP vision to “collaborate with our community to contribute to the student experience, advise students throughout their development and connect them to campus

resources that support their learning, learn, grow, and commit to our personal and professional development, develop and refine our role by contributing to the direction of our new student service model, deliver for service excellence” (created August 2012) informs how the SSA unit engages with students.

Currently all domestic and international undergraduate students are assigned one ESP who will follow them through the course of their time as an undergraduate student at UBC, while Non-Degree and graduate level students are able to access direct support through a service point or, in some cases, through designated email inboxes based on program. All students, therefore, have different options available in how they engage with Enrolment Services. In recognition that some student populations do not have assigned, designated Enrolment Services Professionals, a recommendation was put forward to review the service point hours to ensure students are receiving an optimal experience.

Within the three types of advising that students engage with when they connect with Enrolment Services (prospective student advising, transition and campus advising and financial advising), the following recommendations were put forward as well with the hope that in reviewing the following recommendations the SSA unit could be at the forefront within higher education in North America of offering the best service possible to students.

- Determine if ESPs could be assigned to students when they accept their offer of admission.
- Should a student change faculties, evaluate if the ESP should stay with the student or remain associated with the faculty.
- Consider and plan for ways in which the model of the SSA unit can contribute to the literature base on ‘one-stop’ like units across North America in higher education.

CONCLUSION

The recommendations included in this document were drafted through critical reflection, by the advisory committee, on the work the SSA unit has done over the last few years. The year ahead will see further evaluation and testing of the recommendations with a view toward implementing those that are viable to enhance the experience for students, staff, faculty and the university community.

The SSA unit recognizes that in order to provide high quality services in a timely fashion and in a centralized way at an institution that has a number of highly decentralized qualities, it needs a great deal of patience, flexibility and collaboration to help foster it. The unit holds a great deal of responsibility – and pride – in managing the direct student support of all students on the Vancouver campus and a majority of the inquiries of prospective students between the Okanagan and Vancouver campuses, with a particular focus on supporting students through financial matters in their studies. Ensuring ongoing evaluation, reflection and analysis of work is crucial to retain a high level of consistency in practice and outcomes among students. The process of drafting this self-study has been iterative and has drawn on the continued input and constructive recommendations from key stakeholders on its advisory committee. Moving forward with any of the recommendations in this document will not only impact the work of the SSA unit and its partners, but Enrolment Services as a whole. The SSA unit’s work is very closely connected to other units in Enrolment Services, and therefore the success of the items that are actioned here will be deeply connected to the work of colleagues across Enrolment Services as well as the SSA unit. The preparation of the final document has allowed many of the unit’s strengths and areas of opportunity to emerge, and has helped to chart a course for

the work of the unit in the years ahead, and reinforce the mission of Enrolment Services, the vision of the university and an outstanding stakeholder experience for all.

APPENDIX: COMMITTEE MEMBERSHIP

An advisory committee comprising faculty, staff and students from across the Vancouver campus was established to guide the work of the SSA researchers and authors. The committee was composed of the following members, with members selected at the discretion of the Associate Registrar & Director, SSA and Registrar:

Dr. Tiffany Potter	Associate Head, First-Year English Coordinator, and Senior Instructor Department of English, Faculty of Arts
Patty Hambler	Associate Director Strategic Initiatives & Special Projects, Student Development & Services
Michelle Mallette	Director Student Academic Services, Faculty of Science
Karen Waugh-Clark	Senior International Student Recruiter/Advisor – Awards & On-Campus International Student Initiative
Andrew Arida	Associate Registrar Undergraduate Admissions & Student Recruitment
Jenna Omassi	VP Academic and University Affairs Alma Mater Society
Tobias Friedel	President Graduate Student Society

The advisory committee provided guidance and direction in determining what areas the members of the SSA researchers/authors should examine in preparing the self-study. The researchers/authors collected the data – both qualitative and quantitative – and composed the final document with the guidance of the advisory committee. The researchers/authors were composed of the following members, with members selected at the discretion of the Associate Registrar, SSA and Registrar:

Darran Fernandez	Associate Registrar & Director Student Support & Advising, Enrolment Services
Jennifer Chin	Associate Director Student Support & Advising, Enrolment Services
Julie Foran	Enrolment Services Professionals
Natalie Tole	Student Support & Advising, Enrolment Services
Adam Lukasiewicz	