



Advising Center for the College of Arts, Languages & Letters
Strategic Technology Plan for 2023-2026

Adopted: December 14, 2022

Advising Center for CALL Technology Plan

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I. Overview of Strategic Technology Plan

This Strategic Technology Plan is designed as a guide for the Advising Center for the College of Arts, Languages & Letters (CALL) to provide a framework for planning and implementing changes to the unit's processes and technologies for 2023-2026. A Strategic Technology Plan draft for the unit was completed in 2019 prior to the college's reorganization, but it was never officially adopted. Building on the foundations of that draft, this is the first Strategic Technology Plan for the Advising Center for CALL and will require continuous review and input by all members of the Advising Center. The strategic goals of this plan are designed to align with the unit's mission and represent contributions by all members of the unit.

The Advising Center is the college advising unit for the College of Arts, Languages & Letters at the University of Hawai'i at Mānoa. The unit was renamed in 2020 as part of a college reorganization, and currently has five full-time positions. The unit's budget differs annually, with a limited budget set aside for Information Technology (IT) and a reliance on the college's computer replacement program for individual advisors. Overall and generally, at the end of the fiscal year all of the remaining budget is prioritized for IT; beside employee cost, IT is the second highest cost priority.

The Advising Center is currently moving toward more sustainable and efficient practices that will streamline processes and enhance the student experience. Changes and outcomes outlined in this plan include:

- Ongoing improvement of website navigation and user experience
- Adoption and onboarding of technologies including full integration with relevant features of STAR programs (e.g., Balance, Academic Logic) and OnBase. This will allow further sustainability and reduce the number of places information is stored, leading to better organization and management of data.
- Becoming paperless and reducing use of online forms

II. Introduction

Advising Center Mission:

The Advising Center helps College of Arts, Languages & Letters (CALL) students clarify their life and career goals, develop meaningful educational plans, navigate challenges, and attain a liberal arts baccalaureate degree, thereby preparing for productive lives, enlightened citizenship, and life-long learning.

Advising Center Description:

In May 2019, the unit, formerly known as the Advising Center for the Colleges of Arts & Humanities (AH) and Languages, Linguistics & Literature (LLL), moved into Sinclair Building 301, which is a space that is shared with the College of Natural Sciences Student Academic Success Center. Starting July 1, 2020, a reorganization occurred that combined the School for Pacific and Asian Studies with the colleges of AH and LLL, to form a new single college called the College of Arts, Languages & Letters. As a result, the Advising Center's name was changed to the Advising Center for CALL.

The Advising Center is the college advising unit for all declared undergraduate CALL majors at UH Mānoa (approximately 1400 undergraduate students); the unit also serves prospective CALL majors. The Advising Center for CALL assists students who are at various developmental stages, including prospective and returning students, graduating seniors, academically at-risk students, and transfer and second-degree students.

From 2020 until 2022, there were staffing changes in the Advising Center, including limited to no restoration of the following full-time positions due to fiscal restrictions of the university:

- Elimination of the IT Specialist (reassigned to serve the entire college)
 - IT Specialist Seth Yoshioka-Maxwell was a plan coordinator and part of the initial team that contributed to this technology plan in 2019.

Retirement (and loss of position) of a full-time faculty specialist advisor at the end of 2020

Currently the full-time employee positions for the Advising Center are as follows:

- 1 director/chair
- 2 full-time advisors
- 1 operations manager
- 1 secretary

The Advising Center also employs student staff including Mānoa Peer advisors (funded by the Office of Student Academic Services), and fiscal and welcome desk student assistants.

Additionally, there is one advisor in residence from the Study Abroad Center.

Starting at the beginning of 2023, Sinclair Building will be renovated; as a result, the Advising Center will temporarily move to Sakamaki D202 until the renovation is completed. The space will concurrently house the CALL IT Department. Upon completion, the Advising Center will move back into Sinclair Building and share the space with the College of Natural Sciences Academic Success Center, Interdisciplinary Studies unit, and the Honors program. The reopening is scheduled to occur by the start of the Fall 2024 semester.

Technology Planning Team:

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III. Organization Analysis

Current Processes:

The following are the current processes of the Advising Center:

- 1) Interacting synchronously and asynchronously with students, including inquiries at the Welcome Desk, correspondence to the unit's general email addresses, advising appointments, and follow up contact via phone and email
 - a) Making student appointments using STAR Balance and via a Google form
- 2) Disseminating general information to students including office information, forms, procedures, and announcements using a bulk email calendar, and through the Advising Center's website and Instagram account.
- 3) Storing and organizing student information including forms, advisor notes, and actions taken on the record
 - a) Recording/documenting student interactions (i.e., advisor notes)
 - b) Inputting information from physical or PDF forms into Access Database (i.e., GradAC Database)
 - c) Creating and maintaining e-files for current and prospective CALL majors
- 4) Sharing and exchanging information with other units and departments at UH Mānoa including the Office of Admissions, Office of the Registrar, major departments, and outside colleges
- 5) Collecting evaluations of advisor appointments
 - a) Tracking Advisor appointment data (i.e., Stats and Tallies Database)
- 6) Accessing university-wide student data (i.e., STAR Academic Logic DB)

Process Improvements:

Upon review of the Advising Center's current processes, there are opportunities for improvement in several areas. Improving these processes can result in the following outcomes:

- Making information more easily accessible to students and advisors
- Increasing consistency in formatting and management of information
- Increasing buy-in and shared responsibility of processes (rather than having to rely on one or two people)
- Increasing efficiency by cutting or eliminating time to find/access information

The following improvements can be made to the respective processes:

- 1) Continuing improvement of website design, paying attention to clarifying audience; reducing text and reorganizing information in a way that best serves audience interaction
- 2) Fully using STAR Balance features, which include tracking of all appointments
 - a) Building appointment evaluation modules in Balance
 - b) Fully utilizing targeted email campaign functions
 - c) Exploring the use of early alert functions in STAR Balance
- 3) Using OnBase to create and manage student information
 - a) Eliminating the need to record interactions in multiple places/platforms
 - b) Eliminating the need for using a separate database(s)
 - c) Allowing sharing of information across campus with offices that also use OnBase
- 4) Become 100% paperless, and continue to reduce forms, which will further increase efficiency in data entry processes.

- 5) Ensuring familiarity of STAR Academic Logic DB by all faculty/staff involved with Advising Center programs, to acquire student information for programs including graduation, academic actions and academic warning that are essential for the Advising Center

In addition to supporting the Advising Center's mission, process improvements would align with concepts found in the University of Hawaii Strategic Plan for Information Technology (University of Hawai'i System, 2018, pp. 8-9), Strategic Planning Framework section:

- Customer needs
- Results-driven
- High-value benefits
- Research, outreach, innovation
- Leadership position in the understanding, adoption and implementation of new technologies
- Potential to yield long-term value
- Quality and consistency of our customer-facing products and services
- Working to control long-term operational expenses, and ensure that our efforts are sustainable

Current State of Technology:

The Advising Center has strived to improve processes toward more efficient, supportive, and sustainable practices. In 2020 the unit fully adopted the use of Zoom for video appointments, which was easily integrated into the STAR Balance system. In Summer 2019, the Advising Center also started transitioning from using Google Calendar to using STAR Balance to schedule student appointments. During that time, the Advising Center IT Specialist and Operations Manager worked closely with the STAR Balance technical team to continuously improve the system. The Advising Center fully adopted the STAR Balance system for scheduling student appointments in early 2020 and also opened the option for students to schedule their own appointments that year. The impact of the COVID-19 pandemic accelerated the adoption of several technology-driven functions and the 2019 draft of this technology plan helped ease that transition. However, the unit needs to fully integrate with the STAR Balance system including features beyond scheduling appointments.

Moving toward paperless practices has been one of the unit's top priorities; one such result was a transition to e-files from paper files and reducing printed forms. The Advising Center currently has student electronic files (e-files) that are stored on the department's server. These e-files contain a mix of different types of files including Excel, MS Word, and PDF. All forms that are used by faculty/staff and required to be filled out by students have been converted from physical paper form to forms that can be submitted electronically (i.e., PDF, Quali Build, OnBase), which has reduced the budget spent on printing, copying, and scanning paper forms. A decrease in use of forms, overall, further resulted from projects spearheaded by the Office of the Registrar; examples include the VA Request for Enrollment Certification and Application for Degree forms. Although PDF versions of these forms are occasionally required, the number of these forms processed by the Advising Center has been reduced significantly. However, the unit is not yet 100% paperless.

The Advising Center works together with major advisors in the college's departments as part of a dual advising system. Within this system, major advisors confirm a student's major requirements using a "Goldenrod" form, in order for the Advising Center to certify that degree requirements have been met for graduation. Currently, major advisors must complete a PDF version of a Goldenrod form to verify major requirements for all graduating students in CALL. This requires the major advisors to manually type in information about courses the student has taken and plans to take in their final semesters onto the form. Starting Fall 2022, the Advising Center piloted a STAR Advisor Note template of the Goldenrod, which would minimize information needing to be manually entered by referring to information already displayed in the STAR system, thus allowing advisors to save time without having to duplicate information onto the PDF. The Advising Center seeks to further reduce the use of forms.

Data is also stored in multiple places/platforms, including data that is manually input from hand-written forms to databases and spreadsheets; this results in time spent not only on the labor but also the process of "interpreting" handwriting. In preparation to use OnBase, the unit purchased desktop scanners that are compatible with the system/software for all faculty and staff. The Director has consulted the OnBase team and the University Registrar regarding the transition to using the OnBase system. However, while efficiency in these redundant systems is being explored, the unit must examine further solutions for streamlining.

Advisor computer hardware (PCs/laptops) are replaced every four to five years on a maintained schedule by the college. The cost of peripherals such as webcams and headsets for all advisors to have the ability to use video conferencing for their individual appointments remains with the unit.

The Advising Center's website was previously edited by the IT Specialist, with requests and input from the faculty/staff. After a technical glitch in the web design software, the website underwent a significant update to redesign the look and increase ease of navigation, to align with the college's website. The website is updated when deemed necessary (e.g., changes in policies/procedures, or "crisis" situations); major changes are primarily prescribed by the Director.

Technology Improvements and Acquisitions:

Advising Center Website/Instagram

Website interaction has not been user tested outside the unit to inform design. Usability testing is a way to see how users interact with the website and informs needed changes. Usability testing is imperative; "Doing usability testing the right way, at the right time with the right set of people reduces the risk of building the wrong product; thereby saving time, money, and other precious resources" (Quovantis, 2017). Although usability testing can have associated costs such as staff and time (someone needing to research, design, and carry out the testing), and recruitment of users, the result would be a product that is most helpful and useful to students. Finally, for the website to be most effective, constant design and content updates are required.

The Advising Center currently has its own Instagram account, which is separate from the college's Instagram account and maintained by the Advising Center's Welcome Desk student

assistants (under supervision of the Director/staff). However, the Advising Center's Instagram account will be dissolved and the Advising Center will instead create content for the college's Instagram account. This will result in the Advising Center's ability to reach a wider audience and benefit the college with increased production of content.

STAR Balance

Full integration with relevant features of the STAR Balance system, such as email campaigns, appointment evaluations and early alert functions, is another goal for the Advising Center. While there is no monetary cost involved, there are costs of time and management. Because the system is not designed/programmed within the Advising Center but requires work with an outside office (STAR), improvements must be vetted and approved before going into effect. While the Advising Center is willing to integrate with Balance, it must wait until all necessary changes are made by the STAR office before making the system available to students; changes are not guaranteed to be approved (i.e., there are currently several requests that are in the queue, with some requests having been denied). The Advising Center will need to continue to liaison with the STAR office to work on continuously improving the system.

OnBase

Transitioning from the Advising Center's current e-file system to using OnBase as a primary information system will require significant changes in processes for formatting and labeling files. The OnBase system has already been built out by ACCESS, the advising unit in the College of Social Sciences, and their system "blueprint" for OnBase can be used as a framework for transitioning the Advising Center to OnBase. The Advising Center should also work collaboratively with the ECM (Enterprise Content Management) team in UH ITS. However, aside from processing and storing of files, the process of form intake will also need to be reconfigured. Because the OnBase system is regularly maintained to follow data governance standards, information will be discarded securely on a regular schedule, which also improves security and efficiency for the Advising Center (currently, staff periodically check files, but this process lacks consistency). The OnBase system is also maintained by a third party, which provides regular support and does not require reliance on any one individual in the Advising Center. While there may be a learning curve at the beginning, the result will be time and manpower saved with increased efficiency, increased storage and security standards, and increased sustainable practices. While there is currently no monetary cost to the unit, as with all new technologies, a major barrier may be the social "cost" to adopt the technology. This will require training and buy-in from faculty/staff, with the willingness to change or discard current procedures to adapt new ones — rather than thinking about how it will "fit" into current processes, considering processes "outside the box" may be required.

While OnBase can aid the Advising Center with moving closer toward becoming completely paperless, the transition will not occur overnight and will require collaboration and process changes from partner offices. For example, in order for the Advising Center to send forms electronically to another unit, the unit must be able and willing to accept the forms through OnBase. The process of converting forms from one format to another will also require time. All of the changes will further require consistent attention to the management and workflow of the system by individuals in the unit.

Forms/Paper reduction

The Advising Center will continue to the next phase of piloting the Goldenrod in STAR. Two major departments have participated in the Goldenrod pilot so far, and the Advising Center plans to continue adding departments in the next phases of the pilot, with the goal of eventually eliminating the PDF form. One challenge will be to receive buy-in from all departments.

The Advising Center currently certifies that degree requirements have been met as part of a Graduation Actions process. The Advising Center—chiefly, the Director of the unit—will be working with the University Registrar toward having the Graduation Actions process transitioned to the Office of the Registrar, with an approximately effective date of Fall 2023. This may further reduce the information processed by the Advising center and, as a result, further reduce forms. However, the Advising Center acknowledges that departmental certification in some form (e.g., “Graduation checks”) will need to continue as issues may arise during the transitional period and information will need to continuously be reviewed, revised and corrected.

In appointments with students who are new to the college, the Advising Center currently uses an *Initial Advising Packet*, which is a print booklet that is reviewed together with the student during their appointment. In order to address limited advising staff, repetition of information, and seeking to make the information more widely available while remaining engaging, the Advising Center decided to transition from an all-text format to a series of videos that students can review online, prior to their appointment with an advisor. With input from all advisors, the Director of the Advising Center is working with the unit’s MPAs to create content for these videos, which are currently in production. While the packet is currently primarily used as a PDF, a number of physical packets is also printed; eliminating the print version would also eliminate the need to print physical packets.

In all areas outlined above, there is no monetary cost, but a significant cost in time with changes in processes and training.

IV. Technology Budget

The overall annual budget amount that should be dedicated to technology differs by the needs of the department. In years that require a lot of replacements of computers and other technology, the amount will need to be higher than other years. One area that is being addressed is the cost of server space for a shared drive. For several years, the cost of the server space only increased as more data was added to the server. In 2021, the contents of the server began going through periodic review to purge unnecessary files or archive them on an external server.

The College has implemented a technology replacement program that replaces individual computers for full-time employees. This program takes the cost of updating for five (5) of the computers in the office. It does not, however, include the cost of other technology, which currently includes:

PCs (student assistants, peer advisors, student use)

Monitors

All in one PCs

Scanner

iPads/tablets

Conference Camera

Projector

Webcams

Headsets

Although OnBase (and similarly STAR systems) may support several of the features the Advising Center is seeking to improve its information management and sharing of documents within the unit and campus-wide, it may not support all features and needs.

Currently, there are no known additional costs to the Advising Center associated with the use of OnBase.

V. Measures of Technology Plan Success

The following describes the measures of success of the Advising Center's technology-supported process improvements.

- 1) Focus on students as the main audience for the website; further reorganize content, reduce text overall, and reduce steps required to find information. Usability tests will be conducted with subjects from this audience. Pre- and post- tests will be used: at least one test prior to re-design of the website (to inform design), and one test after re-design (to test design and inform any other changes). Issues that arise from usability tests will be addressed.
- 2) Use all STAR Balance features that are relevant to the Advising Center
- 3) Have 100% of processes done in OnBase and STAR Balance, to eliminate the need for storing data in ACCESS databases, Google forms, spreadsheets, etc.
- 4) Become 100% paperless. Eliminate PDF goldenrod and replace the Initial Advising Packet (print version) with videos.
- 5) Have 100% of advisors and staff trained in relevant tools inSTAR Academic Logic and obtain the respective security permissions.ct.

The Advising Center will utilize this plan in moving forward with technology projects. This plan will be continuously reviewed and updated to ensure alignment with the goals of the unit.

VII. References

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