



**WILLIAM & MARY**  
**OFFICE OF ACADEMIC ADVISING**

Annual Report  
2019-20 Academic Year

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Associate Director, Office of Academic Advising  
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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.

## Inclusion

The Office of Academic Advising upholds the principle of equal opportunity for all through intentionally considering, in advising and programming, how students' identities intersect with their educational experiences.

## Team Members

Dean of Undergraduate Studies – Janice Zeman  
Faculty Director – Thomas Linneman (Fall 2019)  
Interim Faculty Director – Elizabeth Harbron (Spring 2020)  
Associate Director – Shelly N. Laurenzo  
Academic Advisor – Gail Williams  
Academic Advisor – Carmen Crowell  
Academic Advisor – Dane Pascoe  
Administrative Coordinator – Beth Rothenberger

## Highlights of the 2019-20 Year

**Diversity and Inclusion Plan** – The first OAA Goal from 2019-20 was to identify and create opportunities to deepen team members' understanding of diversity in our office and in the larger campus community. To that end, the OAA developed a Diversity and Inclusion Plan (appendix A).

**Increase campus community engagement** – The second OAA Goal from 2019-20 was to identify and create opportunities for team members to be engaged on campus. In particular, each team member reported back two campus opportunities they engaged in per semester (appendix B).

**Revise petition process** – The third OAA Goal from 2019-20 was to review and revise the petition process to ensure that the OAA is supporting students effectively. Both Janice and Shelly led trainings for advisors on the petition process, and Shelly continued to work with IT on taking forms online.

**COVID-19** – During the spring of 2020, William & Mary adjusted to remote learning and remote working models in response to COVID-19. Fortunately, advisors were able to continue to support students through Zoom, phone, and email.

**Personnel changes** – The OAA was able to have a graduate student intern, Annabelle Bass, for summer 2020.

## Incoming Students

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

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 students to a pre-major advisor (pre-major advisors are instructional faculty).
- Provide supplementary information to pre-major advisors about their assigned advisees (initial faculty advising meetings are scheduled in August and January)

In 2019-20 we matched approximately 1,550 incoming first year students and 221 incoming transfer students and facilitated their first meetings with their pre-major advisors.

## College Studies

By the end of June we have assigned incoming students to small groups of Peer Advisors, who assist and advise them in completing Part 1 of College Studies, an online short course designed to introduce incoming students to academic life. Every incoming student is required to complete Parts 1 and 2 of this course as a condition of registering for fall courses. In 2019-20, the majority of incoming students (98%) completed the course successfully in the scheduled time frame.

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

For the summer 2020 version of the course, many edits and changes were made to update the material and include specific information about the new summer registration process. Lori and Shelly created another version of the course specific to the needs of incoming transfer students, in addition to the Joint Degree Programme version instituted in the summer of 2019.

*About the Peer Advising Program.* Student volunteers in this group serve as instructors for College Studies for incoming students and academic advising mentors for all undergraduate students. Gail serves as the program's coordinator. This is a year-round role, which includes training and student development, working collaboratively with the executive board, and recruiting. In 2019-20, Gail recruited five executive board members and 55 student Peer Advisors (PAs). The Peer Advising Program went through multiple shifts as the focus transitioned away from in-person support during Orientation, to increased online support during College Studies. Gail provides both in-person trainings and virtual trainings through Blackboard. She 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 planned and developed a training session hosted for the pre-major advisors. In 2019-20 Tom led two training sessions, with

approximately 275 advisors and advising colleagues in attendance. Janice also hosted two short training sessions for transfer advisors. In addition to the training right before the start of the fall semester, Elizabeth led a training in January before the start of the spring semester for approximately 10 of our incoming transfer pre-major advisors. In March, Elizabeth hosted a webinar to support faculty advisors as they transitioned to online advising.

Throughout the year, the OAA notifies pre-major faculty advisors of timely information related to their advising roles.

### 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. Our 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 to assist new and continuing students in their academic planning.

During this past academic year, the office had a slight shift from majority freshmen/sophomore student appointments to junior/senior student appointments, with seniors comprising 25% of appointments. After spring break, the office met with students virtually, via phone or Zoom, comprising 17% of our student appointments for the year.

The data cited above are from July 2019 to June 2020. The dataset is presented and summarized in Appendix C.

#### Workshops and Presentations

Our professional 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.

Unfortunately, the bulk of the spring semester programming was cancelled as the institution transitioned to pandemic operations.

In 2019-20 we gave the following presentations:

- PLUS Students, “Academic Strategies” presented by Gail Williams, July 2019.
- Student-Athletes, “Academic Strategies” presented by Dane Pascoe and Gail Williams, July 2019.
- Families, “Academic Advising at William & Mary” presented by Shelly Laurenzo and Tom Linneman for Parent & Family Programs Webinar Series, October 2019.
- Transfer Students, “Choosing a Major” presented by Carmen Crosswell, October 2019.

- Freshmen and Sophomores, “Declaring a Major” presented by Dane Pascoe and Gail Williams, October 2019.
- Freshmen and Sophomores, “Majors, Milk, and Cookies” co-presented with the Cohen Career Center by Dane Pascoe, October 2019.
- Families, “Midterm Academic Success Roundtable” co-presented by Shelly Laurenzo for Parent & Family Programs Webinar Series, February 2020.
- Freshmen and Sophomores, “Declaring a Major” presented by Dane Pascoe and Gail Williams, March 2020.
- Transfer Students, “Choosing a Major” video shared via Blackboard by Carmen Crowell, March 2020.

### 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.

For direct student services, Carmen serves as the 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. We enrolled 173 transfer students in the fall and 66 in the spring. The OAA also support co-enrolled students, students who are simultaneously enrolled at either Thomas Nelson Community College or Richard Bland College and William & Mary. Shelly coordinated the orientation for co-enrolled students in the fall and Carmen coordinated in the spring, working closely with First Year Experience. This past academic year, she implemented mandatory meetings with each co-enrolled student as a means to check in. She hosted two Lunch & Learn events for Thomas Nelson Community College, where students and colleagues were invited to learn more about the curriculum at W&M.

### Other Projects

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

### Faculty Advisor of the Year

Janice and Tom oversaw the faculty advisor of the year survey. Dane and Beth provided the administrative support for this project. The award was renamed in August 2018 to the Monica Potkay Advisor of the Year Award, and in 2019 was awarded to Professor Anya Lunden, an Associate Professor of English. Tom and Shelly also nominated Prof. Lunden for the NACADA Region 2 Excellence in Academic Advising – Faculty Advisor award and won.

### Processing Petitions and Forms

The OAA serves the administrative function of processing Committee on Degree petitions as well as Dean of Undergraduate Studies forms. Beth leads this process for the OAA. This year the OAA processed over 250 forms. This is a decrease compared to previous academic years; however, it is assumed that this is due to the pandemic disruptions. Beth has also aided in updating the processes and procedures for managing forms. Shelly worked with IT on drafting forms in DocuSign. Unfortunately work on that project has been paused due to our spring semester work adjustments;

however with the transition to teleworking, students and colleagues have now been emailing their petitions to the office and we have been able to easily adapt to paperless forms. Janice also led a training for the advisors in how she reviews petitions and how the committee evaluates them. This information supports advisors in helping students prepare their petitions. *(Please refer to Appendix D for the complete COD Report).*

### Studying with Distance Learning

In conjunction with Kathy Larrieu, the Arts & Sciences Web Specialist, the OAA created a website to support students as they transitioned to distance learning during the spring semester:

<https://www.wm.edu/as/undergraduate/strategies-planning/studying-distance-learning/index.php>

## Professional Advisor Training and Development

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

All advisors and the associate director are members of NACADA (the National Academic Advising Association). The OAA also has an internal lending library. This year our office coordinated viewings of select NACADA webinars and welcomed members of the campus community to attend as well. Topics included:

- “Academic Advising and Trans Equity: Building our Tomorrow.” December 2019.
- “Academic Advising for Social Justice: Theory, Reflection, and Practice.” April 2020.

In addition to the office-wide trainings, individuals also sought out opportunities as well. Below is a listing of some of the trainings team members participated in:

- Carmen Crowell:
  - Attended How We Manage Student Crises presented by William & Mary’s Dean of Students Office.
  - Attended William & Mary’s Diversity and Inclusion Symposium.
- Shelly Laurenzo:
  - Attended the Students in Transition Conference presented by the National Resource Center for the First Year Experience and Students in Transition.
  - Attended the William & Mary Higher Education 50<sup>th</sup> Reunion Conference.
- Dane Pascoe:
  - Attended the William & Mary Higher Education 50<sup>th</sup> Reunion Conference.
  - Attended NACADA Annual Conference.
- Beth Rothenberger
  - Attended 10 Ways to a Better Conversation presented by William & Mary’s Human Resources Office.
  - Attended Procure to Pay workshops presented by William & Mary’s Procurement Office.
- Gail Williams:
  - Attended NACADA Annual Conference.

### Retreats

The OAA hosted two retreats.:

1. Orientation Debrief: After the fall 2019 orientation, the OAA held a retreat to focus on ideas and strategies to improve our work in August around orientation and advising.
2. Summer Registration Retreat: During spring break 2020, the OAA team held a two-hour retreat to review the new process for summer registration and develop office policies and procedures to support this new initiative.

## Conclusion

Overall, this has been another productive year for the OAA. The office made great strides in completing the office goals for the year and continued to serve students successfully as we transitioned to online services in March. In lieu of establishing formalized goals for the upcoming academic year, the office will instead adapt President Rowe's guiding governing themes of flexibility, safety, wellness, equity, collaboration, innovation and service. These themes will ensure continuity of service in the coming year.

## Appendix A: Diversity and Inclusion Plan



### WILLIAM & MARY OFFICE OF ACADEMIC ADVISING

#### Diversity and Inclusion Plan

For the 2019-2020 academic year, the Office of Academic Advising (OAA) has established, as one of its goals, to create and implement a Diversity and Inclusion Plan (D&I Plan). During the OAA's annual retreat in August, 2019, the team discussed a variety of methods to identify and create opportunities to deepen team member's understanding of diversity in our office and in the larger campus community. Below are the elements of our D&I Plan. Our intention is to accomplish these goals by the end of the Spring 2020 semester.

##### Elements of the D&I Plan:

- Develop a diversity statement for the OAA.
- Find opportunities for OAA team members to serve on diversity committees around the institution.
- Highlight Dane Pascoe's work in supporting first generation/low income (FGLI) students.
- Work with on campus experts (e.g. SAS, neurodiversity committee) to ensure that we are using best practices when working with students.
- Select professional development opportunities around diversity issues. In particular, two of the NACADA webinars that the OAA will host for all William & Mary advisors are focused on diversity:
  - "Academic Advising and Trans Equity: Building our Tomorrow" to be held on December 11<sup>th</sup>, 2019.
  - "Academic Advising for Social Justice: Theory, Reflection, and Practice" to be held on April 15<sup>th</sup>, 2020.

## Appendix B: Campus Engagement Summary



DATE: June 30, 2020  
TO: Office of Academic Advising  
FROM: Shelly N. Laurenzo, Associate Director  
RE: OAA 1920 Goal Two: Campus Community Engagement End of Year Report

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During the 1920 Academic Year, members of the Office of Academic Advising were asked to participate in at least two campus community events/programs outside of their job responsibilities each semester. While most folks participated in more than many opportunities, below I have highlighted four for each person to represent a diversity of engagement.

Dane:

- Food Pantry
- FGLI (first-gen, low income) student group
- Presenter, Swem Library Lightning Rounds
- Reviewer, Charles Center Summer Research Grants

Carmen:

- Mindfulness training sessions
- Member, Campus Health 2020 Committee
- Charter Day Ceremony
- Breath Techniques for Calming & Energizing

Gail:

- Muscarelle event: "Link Steamroller Print Project"
- Student Affairs divisional meeting
- Dr. Martin Luther King Jr. Commemoration: Yusef Salaam of the exonerated Central Park Five
- Community Conversations

Beth:

- Connections Fair
- Community & Volunteer Fair
- Charter Day Ceremony
- Staff Assembly

Shelly:

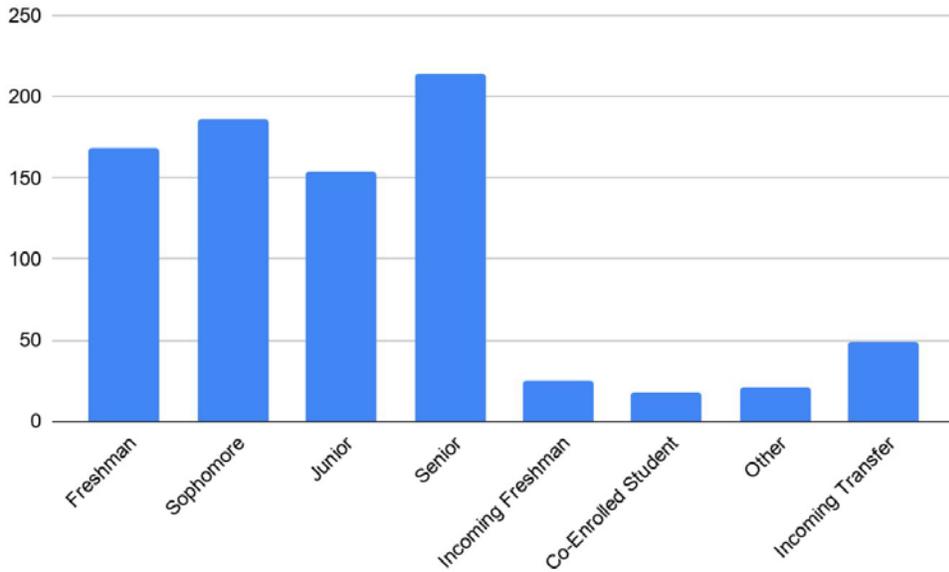
- Women's Network Reception
- Homecoming Parade (3<sup>rd</sup> place for community float)
- Women's Basketball game
- Volunteer, Charter Day Ceremony

Swem Library, 169 • P.O. Box 8795 • Williamsburg, Virginia 23187-8795 • (757) 221-2476

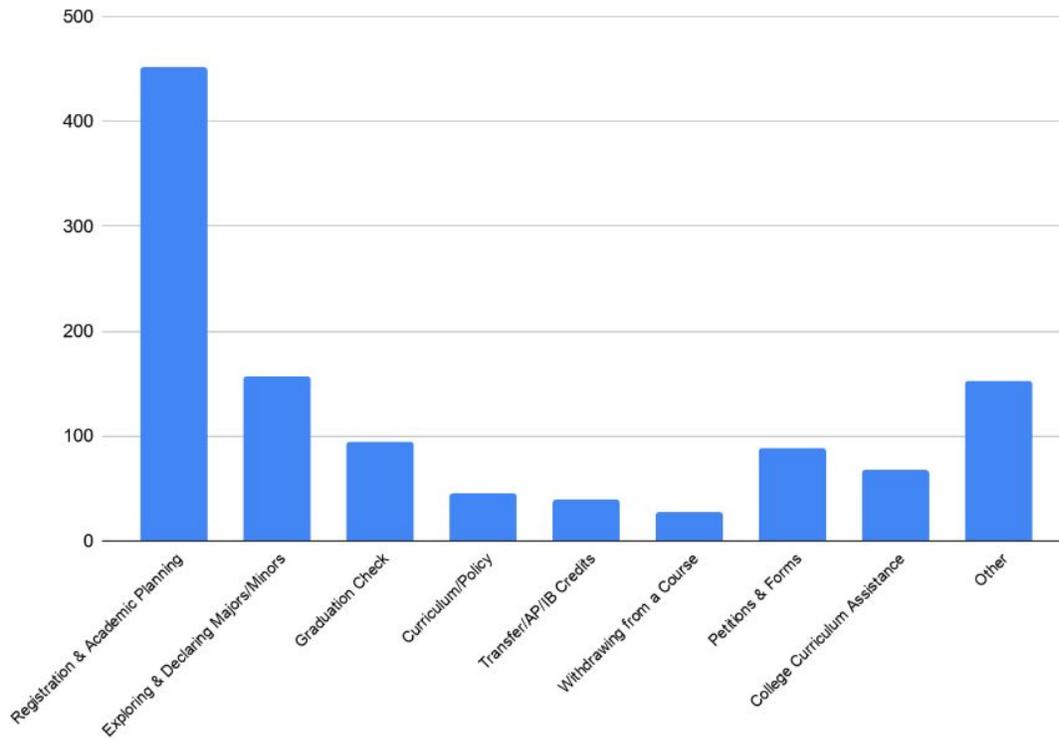
# Appendix C: Breakdown of Student Appointments

835 Appointments  
109 drop ins  
726 scheduled (179 post-campus closure)

Breakdown by student type



Reason for visit



## Appendix D: COD Report



### William & Mary Arts & Sciences

#### OFFICE OF ACADEMIC ADVISING

6/30/2020

400 Landrum Drive  
Williamsburg, VA 23185

Greetings,

For the academic year 2019-2020, the following faculty served on the Committee on Degrees: J. Zeman, (Chair) D. Dallaire, J. Armstrong, L. Morse, and K. Wheatley. Petitions fall into two categories: 1) course substitutions and 2) policy waivers.

For category 1, 146 course substitution petitions were considered, and 132 were approved. 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, 89 policy waiver petitions were considered, and 77 were approved. The most frequent requests were to:

- Retroactively transfer credit from other universities
- Change/exception in major or minor requirements
- Waive senior residency requirement
- Allow final elective credits to be taken elsewhere

Best Regards,

Office of Academic Advising

## Appendix E: 2019-20 Goals

Below are the 2019-20 goals, which were elaborated upon at our Annual Retreat in August 2019.

### Goal One: Diversity and Inclusion Plan

The OAA will identify and create opportunities to deepen team member's understanding of diversity in our office and in the larger campus community.

Please refer to Appendix A for a reference. We also created an Inclusion Statement, which is posted on our website: The Office of Academic Advising upholds the principle of equal opportunity for all through intentionally considering, in advising and programming, how students' identities intersect with their educational experiences.

### Goal Two: Increase campus community engagement

The OAA will identify and create opportunities for team member to be engaged on campus.

Please refer to Appendix B for more information.

### Goal Three: Revise Petition Process

The OAA will review and revise the advising and administrative aspects of the petition process to ensure that students are being supported effectively.

Please refer back to the Processing Petitions & Forms section as well as Appendix D for more information.

As indicated in the conclusion of this report, we have chosen not to identify specific goals for 2020-21 and will instead adapt President Rowe's guiding governing themes of flexibility, safety, wellness, equity, collaboration, innovation and service. These themes will ensure continuity of service in the coming year.