

USU ACADEMIC ADVISORS TRAINING MODULE

Project Feasibility Study
by The NEWbies

Team Members:
Yat-Soon Lee
Wade Oliver
Nate Olson
Susan Parkinson
Perry Tan

Change History

S/No.	Item(s) Changed	Date Updated	Changed By	New Ver. No.
1	Compilation, editing of language, creation of 1.0.	19 Oct	Tan	1.0
2	Resolve formatting problems, re-organization of content, editing.	20 Oct	Lee	1.1
3	Compilation, editing of language and content, re-organization. Standardization of terminologies.	20 Oct	Tan	1.2
4	Content and minor grammatical editing by Oliver. Most changes accepted by Tan.	20 Oct	Tan	1.3
5	Grammatical and format editing by Parkinson. Changed "OATS" to "ATS". Most changes accepted by Tan.	20 Oct	Tan	1.4 Final Version

Table of Contents

Vision Statement

The objective of this project is to create the first training module, which will form part of a larger envisioned academic advisor training program for the Utah State University (USU) Office of Advising and Transition Services (ATS)

Context and Learner Analysis

Presently, there are no existing common guidelines for the 400+ academic advisors (including faculty), who are spread across the various departments of the university. Many advisors are hired and appointed to their assignments without relevant previous experience or proper prior training. Advisors who stay on the job accumulate on-the-job experience over time, but there is a lack of common standards or guidelines, because procedures are often established on a departmental or even personal basis.

Hence, there is a need to create a training program for all advisors in USU so as to establish guidelines and benchmarks for academic advising. However, there may be learner resistance to such a program (and our proposed training module) due to a lack of motivation or skepticism. In order to overcome this, we will conduct rigorous research on the subject matter and several User Acceptance Tests (UATs) so as to ensure the relevance and functionality of our training module.

The present training for advisors includes an annual conference on campus with an invited guest speaker and a monthly workshop series which was started recently. However, training sessions often degenerate into un-engaging and un-interactive information-laden lectures that cause learners to lose interest and motivation. To address this, the instruction will be delivered online, so that learners can attend the lesson in a self-paced environment at any time they please. In addition to feeding learners with mandatory information, the training module will feature a series of problem-based learning activities that will engage high-level analytical skills of the learners. This will not only help to maintain learner interest, it will provide simulation of real-life scenarios that they will face when they perform their duties in the future.

The training module will be developed and delivered via the WebCT platform, which is managed by the FACT center. The content of this module will be focused on Transfer Articulation Advising. It is the objective of the team to create a functional and robust module that can be used as a prototype for subsequent modules of the program.

Needs for the Training Module

The main reasons for the creation of such a training module are:

There is a need to articulate and disseminate benchmarks for the “field” of academic advising in order to professionalize the “field”.

It will enable ATS of USU to develop a set of performance guidelines of its 400+ academic advisors.

Academic advisors will have proper and structured initializing training, skills upgrade, and skills development.

It will provide USU advisors with a more engaging and relevant training module.

Project Objectives

The objectives of this project are:

Achieve the instructional goal of empowering advisors, especially new ones, with the basic skills and knowledge in order for them to carry out their responsibilities with efficiency and passion.

Create a problem-based training module that is relevant, engaging and useful for all academic advisors.

Establish a set of benchmarks for academic advising.

Enhance the quality and effectiveness of academic advising for USU so that both the university and students can indirectly save costs.

Create the first training module that can be used as a model for reference and modification for the development of future additional modules.

Fulfill the project requirement for the second half of InsT6800 for the Department of Instructional Technology, USU.

Business Case

Academic advising is a relatively new “field” of study, and research in this subject matter is currently under-developed. In many universities, advisors are often hired without relevant advising experience and appointed to their jobs by assignment. The situation is no different in Utah State University. Hence, there is a need for professional benchmarks to be established for USU advisors so as to enhance advisor competency and set performance indicators. Once established, this proposed set of benchmarks can serve to better initiate newly appointed advisors as well as enable all advisors to have a set of guidelines for on-the-job reference. In response to this need, our group, The NEWbies, has been approached by the USU Office of Advising and Transition Services to begin work on the first module of an online-accessible advisor training program: Transfer Articulation Advising.

The responsibilities of academic advisors are many and varied. It is pertinent for advisors to be well-versed and updated in University and state policies/procedures, and information update is a continual process due to periodical changes in the policies/procedures. In addition to this task, advisors are expected to be able to demonstrate genuine concern for students through effective communication, record keeping and referral skills. The Outstanding Advisor Award program of the National Academic Advising Association (NACADA) currently has benchmarks for advisor performance and these are likely to be referenced in our training.

At present, there are no known products on the market that are suitable for this training purpose for the 400+ USU advisors (including both faculty and professional advisors). The cost of our project is funded through hard funding from the Office of Advising and Transition Services (ATS). The recoup of costs is not a concern to the client and the main objective is to ensure that advisors are well-trained, and to make the advising process more effective. This will benefit both students and the University, and may in turn, indirectly save costs for both parties.

Once completed, the entire advisor training program will be unveiled to advisors at the monthly Academic Advising Committee meeting and through the academic advising email distribution list. The training will be marketed primarily to newer advisors (less than three years experience). It is also possible that this training will be the major portion of a future advisor certification program, which will be mandatory for all USU advisors.

For this project, the client is the Office of Advising and Transition Services (ATS) of USU and the target learners for our instructional product are the academic advisors of USU. The three key stakeholders of this project are ATS, the academic advisors and the project team.

Project Scope Targets

Key Features

The instruction will be delivered using WebCT, giving learners an online, self-paced learning environment. In this first module, there are three primary objectives: to enable the learner to identify, classify, and evaluate non-USU credits. In order to effectively engage the advisor in the learning process, we will build sample students records using the USU student records system. The learner can access the fictitious students' records via SIS Plus or data warehouse — a skill which will be taught in a future module.

This first module encourages increasingly higher thinking skills as it starts by providing learners with basic instructions, and later requires them to evaluate and solve scenarios that simulate real-life situations.

The advisor will log onto WebCT to learn about the paper- and web-based resources used to evaluate the non-USU credits on the sample student's transcript. The WebCT lesson will assist the advisor in book-marking each of the on-line resources. For each resource, paper- and web-based, there will be a brief summary describing the attributes of the resource that describes when it should be used, and who produced it. Exploration of the resource will be encouraged. Links to web-based resources will be provided, and these will be displayed in new navigator windows when clicked. After the advisor has completed the lesson, he/she will be required to take a short quiz about the resource, which consists of three to five multiple-choice questions. There will also be two questions that require the learner to evaluate a sample transcript using the resource. This instructional design structure will be used to cover the following resources: online articulation guide, online transfer guides, online catalog from another university, USU's Advisor Handbook, and the quarter-to-semester conversion tables. Results of the quizzes will be immediate.

The next activity will require the learner to apply his/her new skills to evaluate a more complex transcript — one that involves the using a combination of the resources. The assessment of this portion will be short answer questions built in a general education evaluation worksheet. There will also be a reflection question addressing possible referrals based on the evaluation. Results of this assessment will take up to a week, as the module's administrator will need to review it.

The last activity will consist of reviewing and judging an evaluation provided by the module, again based on a sample student's transcript. The learner will be asked if the evaluation was done correctly, and if there are modifications that should be made. The learner will respond with a short reflective essay, of one hundred words or less, documenting his/her decision. The essay will be submitted, but not graded. The learner will receive feedback from the module's administrator that will encourage further reflection.

Additional features include the ability to e-mail fellow advisors and the module's administrator for assistance.

Budget Estimation

This project will mainly be self-funded by the project team as part of their course work for InsT6800. However, part of the costs may be subsidized by Utah State University (USU)'s Office of Advising and Transition Services (ATS), which is our client. The subsidies, if any, are subjected to approval by ATS.

This section of the report provides an estimate of the project budget, as well as identifies the main cost components with the assumption that the project will not receive funding from ATS. The estimated budget is as shown in the table below:

S/No.	Component	Estimate Cost
1.	Manpower The team members will provide all the manpower and expertise required in this project. If additional manpower is required, volunteers will be used when necessary.	Nil
2.	Consultation Research into the field of advisory skills will be obtained through online resources and the library. Interviews will be conducted by team members on subject matters experts (SMEs) that are working in the ATS and HASS Advising Center.	Nil

3.	<p>Software Cost</p> <p>The following software and online services are expected to be used for this project:</p> <p>WebCT At least two access IDs will be applied through FACT Center for the purpose of developing content and interface for the training module. The module is to be implemented in a WebCT environment. The IDs are expected to be free.</p> <p>Video Production Software Such software can be used in YETC and other studios in USU. No costs are expected.</p> <p>Web Developing Software Software such as Adobe Photoshop, Macromedia Dreamweaver and Flash are not expected to contribute to the costs as the team already has licenses to use them.</p> <p>Word Processing Software Software such as Microsoft Word and Excel are not expected to contribute to the costs as the team already has licenses to use them.</p>	<p>Nil</p> <p>Nil</p> <p>Nil</p> <p>Nil</p>
4.	<p>Video Production / Editing Equipment Costs</p> <p>Filming equipment may be used for video production purposes. Equipment such as camera lights, digital video camera, VHS camera, and tripod can be checked out from Instructional Technology Resource Services (ITRS) free of charge.</p> <p>File editing tools and software can be found in the media room in YETC. There are no charges for using these services.</p>	<p>Nil</p>
5.	<p>Printing and Production Costs</p> <p>Printing costs for reports, minutes of meetings and project logs are expected to be negligible as each graduate student can print 40 sheets in the computer lab without charge for the semester.</p> <p>Production costs such as report binding and color printing are expected to be incurred for the final product delivery.</p>	<p>Nil</p> <p>\$100.00</p>
6.	<p>Miscellaneous Costs</p> <p>Costs such as transportation and food will be borne by each team member individually and will not be charged into the project budget.</p>	<p>Nil</p>
	<p>Total Estimated Budget</p>	<p>\$100.00</p>

Staffing Requirement

There are a total of five members in the project team. Each member will be assigned with responsibilities that will fully utilize his/her expertise and strengths for the project. All members are expected to contribute in every development phase — even if that he/she has little expertise for that particular phase — as this will serve as a learning experience for skills that they do not already possessed.

Below is a list of main responsibilities of each member. Every member is expected to multi-task and contribute as required to the project in areas other than those stated below.

Yat-Soon Lee (Project Manager)

Main responsibilities:

Project management, resource planning, scheduling, manage reporting to client and project supervisor (i.e. Office of Advisory and Transition Services and Dr. Soulier respectively), maintaining project logs and change control plan.

Secondary responsibilities:

Develop web content, report writing, acting.

Wade Oliver (Chief Researcher)

Main responsibilities:

Conduct research and interviews on product content and functionality, design graphic user interface (GUI), secure funding and resources, advise the team as a SME.

Secondary responsibilities:

Develop web content, report writing, acting.

Nate Olson (Creative Director)

Main responsibilities:

Direct and produce films, scriptwriting, operate camera, light and sound systems, film editing.

Secondary responsibilities:

Develop web content, report writing, acting.

Susan Parkinson (Chief Course Designer)

Main responsibilities:

Conduct research and interview on content and functionality, design GUI, design instructional activities.

Secondary responsibilities:

Develop web content, report writing, acting.

Note: User Acceptance Test (UAT) will be performed by business owners (i.e. Office of Advisory and Transition Services) and team members.

Project Milestones:

Team building	15 Oct
Finalize project scope	17 Oct
Feasibility Study	20 Oct
Preliminary Requirements	27 Oct
Detailed Requirements	3 Nov
Stage 1 Prototype	10 Nov
Formative Evaluation Report	17 Nov
Beta Version Testing	1 Dec
Final Formative Evaluation	3 Dec
Project Completion/Presentation	5 Dec

Change Control Plan

A change control plan will be adopted by the project team throughout the development phases. Such a plan will provide contingency for:

- A set of procedures to ensure all change proposals are reviewed and tracked.
- Decisions on change proposals will be recorded and documented for future references.
- Efficiently management of version control for all modules of the project.
- Allows formal approval of any changes to be made to beta versions at the end of the formative development process.
- Allows an audit trail of the development of the project and the changes and decisions that are made at each phase.

During the initial planning phase, it is expected that changes will be proposed and made frequently with the purpose of finalizing a set of detailed requirements. These requirements will then be translated into functional specifications which the final product will be based on.

The following tools are used to manage the change control and versioning throughout the development.

Change Request

The entire module will be divided into sub-modules and each member will focus on specific areas of work. During the course of development, changes are expected to be proposed, either by team members or through feedback from the client. Such change proposals will be forwarded to the Project Manager for further actions

The proposals will be documented on a Change Request Log (see Appendix C). They will be reviewed during the next project committee weekly meeting or a technical review meeting with all stakeholders.

The proposed changes will be reviewed based on the following criterion:

Costs and benefits in relation to the impact on the overall development schedule.

Costs and benefits in relation to the available resources and manpower to make the change.

Technical feasibility in making the change.

Degree of improvement that the change will bring to the entire module.

Key decisions on approvals and rejections will be recorded in the Change Requests by the Project Manager, as well as minutes of meeting. If the change is urgent, key stakeholders such as the client will be consulted immediately.

After reviewing the change proposal based on the above-mentioned criterion, the change will either be accepted, rejected or keep in view (KIV):

Accepted proposals will either be incorporated into the latest version of development immediately, or be scheduled for the next phase of development depending on the timeline to the next scheduled UAT.

Rejected changes will be recorded in the log for future reference.

Changes are classified as KIV if they are considered to have minimal improvement the delivery of instructions in the training module. They may be revisited towards the development of the beta version if resources are available to implement them.

The components of the Change Request are:

Description — States the proposed change, the sub-module it is affecting, the implication of resource and schedule of such change, the target implementation date, and the party responsible for developing the change.

Request Date — Date that the change request is formally made by the requestor to the Project Manager.

Requested By — Name of the requestor.

Decision — The final decision to approve/reject the change with reasons.

Approved By — The name of the key stakeholder who approves the decision, i.e. Project Manager or the business owner.

Remarks — States any changes to resource allocation, scheduling, target implementation date and the developer in-charge of the change.

All documents will be filed in the final report for audit purposes.

Version Control Responsibilities

Each member of the project team will be responsible for version control in his or her respective areas of work, and to adhere to the procedures defined here.

Project Manager

Tracks all changes made to the final product and update them in the detailed requirements after it has been finalized and implemented.

Keeps all versions of files and follow a clear naming convention to assist file management.

Chief Researcher

Responsible for uploading the developed content into WebCT.

Tracks all changes made to the web content and maintain strict version control on all modified items submitted by team members for implementation.

Keeps all versions of files in separate directories and follow a clear naming convention to assist file management.

Verifies the version of the content before uploading it into WebCT.

Creative Director

Maintains version control on all scripts and films developed for the project.

Verifies the version of the scripts before shooting begins.

Verifies the version of the edited film before submitting it to Chief Researcher for implementation.

Keeps all versions of files and follow a clear naming convention to assist file management.

Chief Course Designer

Maintain version control on design plans for all prototypes before submitting to Chief Editor for compilation.

Verifies the version of the design plans before submission.

Keeps all versions of files and follow a clear naming convention to assist file management.

Chief Editor

Responsible for compiling all documents and deliverables except detailed requirements (which will be maintained by the Project Manager).

Verifies the version of the documents after all changes have been incorporated before submitting to the course instructor.

Keeps all versions of files and follow a clear naming convention to assist file management.

Change Control Methods

Backup plans for critical data:

All files and documents must be backed-up into rewritable media such as CR-RW and zip disks to avoid permanent data loss in the event of any hardware failure.

Maintaining the integrity of content in written documents:

When team members submit their respective portions of work in any document to the Chief Editor for compilation, the Chief Editor will edit the content on a separate file. After the team has reviewed the first draft of the document, if anyone has any comments, he or she is to make the changes on the file with the Track Changes features in Microsoft Word switch on.

In addition, when he or she forwards the file back to the Chief Editor, all changes must be stated briefly in the email. The file will be renamed with the original file name with the team member's name as a suffix. For example, if Olson makes changes to "6800 Feasibility Study 1.3", he will rename the file as "6800 Feasibility Study 1.3 Olson" . These steps will assist the Chief Editor in locating the changes and prevent multiple versions being worked on by the team at the same time.

Naming convention for files:

All files are to be prefixed with "6800" to avoid confusion with other projects. All document templates will be created by the Project Manager to ensure standardization. Once the Chief Editor has created the first version, he will postfix the filename with "1.0". Subsequent changes may be made and this will reflect in the version number. If changes are minimal, the version number will increase to "1.1", "1.2", and so on. If changes are significant, e.g. major modification to a section, the version number will increase to "2.0".

In addition, a Change History table will be created after the cover page of every document. The Chief Editor will input the description of the items changed, the date that the changes are made, the person who made the change, and the updated version number into the table.

User Acceptance Tests (UAT)

UAT will be scheduled at the end of every design cycle for the prototype developed. All stakeholders, i.e. the client, learners (advisors) and project team members will take part in the UAT. Formative evaluation will be conducted based on the feedback from users and reviews by team members and business owners.

Two important milestones (mentioned earlier) of this project are the alpha version UAT scheduled on 10 November, and the beta version UAT to be scheduled on 1 December. In between these two milestones, one or more UAT cycles may be scheduled for the purpose of de-bugging, implementing new changes, and to facilitate more formative evaluations.

To manage the various UAT cycles, the Project Manager will create test scripts that specify the use cases to be tested and the scenarios to be tested against. The test items will be benchmarked against key features or deliverables that are implemented for that particular phase of development.

At the end of each cycle, he will consolidate all test scripts. A technical review meeting will be held to review the feedback and bugs with the project team and business owners with the aim of debugging any defects or identifying areas for improvement. Changes proposed to the Project Manager will be logged in the Change Request Log for further action.

Risk Management Plan

This section of the report describes the risks and liabilities of this project. The main risks/liabilities have been identified, and ranked according to their perceived level of impact to the project:

Unexpected Reformation of SIS System Features & Interface

Information Loss

Failure to Streamline Content

Group member incapacitation

Overcompensation by SMEs within Team

Unexpected Reformation of SIS System Features & Interface

In the case that there is a major reformation of the SIS system features and interface, any previously developed materials may be rendered out-dated and lose its effectiveness.

Safeguard / Contingency

A close working relationship should be maintained with the SIS administrators throughout the development process so that the contents of our product can be verified for accuracy at all times. Any updates to the system will need to be incorporated in the design and implementation of the product.

Information Loss

Since almost all of the materials used in the process of creating this product will be in electronic form, computer crashes will result in loss of data and previously developed contents for the project.

As this project is to be delivered mainly via the WebCT platform, if the WebCT system maintained by the FACT Center at USU is to crash or be rendered inaccessible due to unforeseen circumstances, there will be serious consequences to the project. As WebCT is generally well-managed by the FACT center, there is a low probability that the WebCT system will be rendered inaccessible for a significant amount of time. However, if the unlikely scenario of WebCT crash is to occur, the consequence will be very significant because this project will be developed and delivered mainly using WebCT tools.

Safeguard / Contingency

All project information and data, including research, reports and contents, should be consistently backed-up on multiple machines and media. Each team member will back-up all of their materials on their own machine and on at least one other machine to which they have access, in paper form if applicable, or on other media resources such as a removable drive or disk. In addition, all materials will be aggregated on the Instructional Technology Mac OS X server in a project folder. This will be maintained by the individual team members and overseen jointly by Olson and Lee.

In the case of WebCT crashing, we can create a stand-alone html product, albeit with slightly limited functionalities. Such a product will probably be comparatively less robust in certain aspects like automated assessment scoring and class resource management. Alternatives to WebCT functionality would have to be examined and identified for a working module that meets our present objectives to be delivered according to the present timeline. A modification to the project timeline will need to be considered and worked out.

Group Member Incapacitation

If Wade Oliver is incapacitated for whatever reason (sickness or other personal issues) we will lose a Subject Matter Expert (SME) and a major project stakeholder at the same time. As a SME, Oliver plays an important role as the group consults him for subject matter information, advice and approvals. He also functions as an instructional designer and developer for the project.

In the case whereby Oliver is unable to continue working on the project, we will need to acquire and distribute the materials that he has previously developed as outlined in our

information back-up plan. A likely candidate to replace Oliver as a SME and stakeholder is Oliver's boss, John Mortensen.

Susan Parkinson is also a SME in this project because she is an USU advisor who is employed by the HASS Advising Center, working as a Program Coordinator. If Parkinson becomes incapacitated, we would lose access to her expertise as a SME, her skills and knowledge as an instructional designer, and materials that was previously developed by her. In the case whereby Parkinson is incapacitated, we need to obtain copies of her materials in order to continue working on the project. We will also need to identify and consult another advisor SME who is currently employed by USU.

As the project manager, Yat-Soon Lee provides a leadership role and is responsible for organizing and coordinating the whole project. He is also in-charge of documenting the project development as well as consolidating assignment logs for all team members.

Perry Tan has the role of functioning as the team's consolidating writer/editor for all project reports. He also possesses relevant skills in html design, graphics design and instructional design.

In addition to being skilled in instructional design, WebCT development, and html design, Nate Olson is also competent in video production and editing — a skill which is likely to be useful if we are to incorporate video elements during the development phase.

Safeguard / Contingency

Having two SMEs in Oliver and Parkinson enables us to function properly in the event that one SME becomes incapacitated. The probability that both SMEs become incapacitated is remote, and even in the event of such a case, we can still gain access to SMEs by consulting Oliver's boss and Parkinson's colleagues. Hence, the consequence to the project is at worst medium if both SMEs in the project team get incapacitated.

If any team member is to be incapacitated, extra burden will be placed on remaining team members as they will have to take on additional responsibilities. As all of the team members are currently working on multiple projects and holding jobs, there is little capacity for anyone to take on such responsibilities. This may result in problems in meeting the goals of the project timeline, in this case the objectives and timeline may need to be revised accordingly.

Over-compensation by SMEs within Team

There is also the risk of over-reliance on our two SMEs, Oliver and Parkinson. Firstly, the information and subjective comments provided by our SMEs may not be representative of USU's advisors as a whole. Secondly, as Oliver and Parkinson will also be involved in the instructional design process, there is the possibility of over-compensation when they attempt to straddle the dual roles of SME and instructional designer.

Safeguard / Contingency

To ensure that we deliver a product that is contextually useful to all the advisors, it will be prudent for the team to include advisors from across all of USU's departments in the analysis and in the formative evaluation. Getting the team to be constantly vigilant about this issue will ensure a low-to-medium probability of developing an irrelevant product to our targeted users.

Failure to Streamline Content

The entire advisor training program that our client requires is huge in content and scope, and this project is to design instruction for just one portion — Transfer Articulation Advising. This is mainly due to time and manpower constraints, as we have only 7–8 weeks to work on the project. Hence, there is a risk of the team being over-zealous and ambitious during the developmental phase, and to attempt to include too much contents and components into the project. This may lead to content organizational problems, lack of focus, and even team frustration if the timeline is insufficient to deliver a product that was initially envisioned.

Safeguard / Contingency

It is important for the team to be aware of the short timeframe of this project, and to keep the project small and manageable such that a robust training module can be produced. It has been agreed and stressed among team members that the project goal is to produce a robust training module that covers a small portion of the entire OATS program, rather than to create a poorly designed training module that covers a huge amount of content.

Project Logs

Budget Log

Based on the budget estimation stated in earlier section, a Budget Log will be created to record all expenses made on the development of the project. See Appendix D for template.

Schedule Log

A schedule log will be created to keep track of the progress of the development of the project and the milestones reached in comparison with the proposed schedule. Under the Remarks column, details such as reasons for missing target dates for delivery or milestones, reasons for progress keeping ahead of targeted schedule, major impact on future phases can be recorded. See Appendix E for template.

Change Request Log

As mentioned earlier, all proposed changes will be recorded in this log. Key decisions and justifications, impact on resources and development progress, and the personnel in-

Appendix E: Schedule Log

Project Milestones	Target Dates	Actual Date	Remarks
Team building	15 Oct	15 Oct	Milestone reached.
Finalize project scope	17 Oct	17 Oct	Milestone reached.
Feasibility Study	20 Oct	20 Oct	Milestone reached.
Preliminary Requirements	27 Oct		
Detailed Requirements	3 Nov		
Stage 1 Prototype	10 Nov		
Formative Evaluation Report	17 Nov		
Beta Version Testing	1 Dec		
Final Formative Evaluation	3 Dec		
Project Completion/Presentation	5 Dec		