GETTING RID OF THE SPEED BUMPS: HOW TO ORGANIZE YOUR ADVISING LIFE TO KEEP YOUR CAR ROLLING

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2013 UTAAA Conference
The University of Texas at Arlington
A Little Bit About Me

• Have been advising for almost 5 years now
• Worked in the University Advising Center at UTA for 3 years – the UAC services several thousand freshmen and transfer students with below 30 hours, plus Undeclared and probation students
• Managed caseload of approximately 400-600 freshman and sophomore Science majors
• Now work in the Science Advising Center at UTA for the Earth and Environmental Sciences and Physics Departments (caseload of about 350 students, plus various departmental tasks)
Learning Objectives

• Identify barriers to organization and efficiency in advising

• Discuss time management methods

• Explore different techniques for organizing your physical and digital spaces

• Discover organizational methods that work for you
What Fills Your Day as an Advisor?

- Student appointments
- Student walk-ins
- Emails
- Phone calls/voicemail
- Meetings
- Projects and/or presentations
- Miscellaneous (online chatting, graduation planning, class scheduling, etc.)
SPEED BUMP
Not Enough Hours in the Day

• What does a typical day look like for you? (activity)
  • Lunch
  • Student appointments
  • Meetings
  • Projects
  • Email/voicemail time, etc.

• What do you accomplish each day and what do you seem to never get finished (or never even get started on)?

• Your calendar doesn’t tell you the whole picture
  • How are you spending time when your calendar is empty (breaks between seeing students, etc.)?
  • How are you keeping track of what you need to work on or finish?
Time Management: Not Just for Students

• Look at your typical day

1. What are some areas, if any, that you can adjust? Examples: one less student appointment so that you can catch up on email, projects; reduce your commitments (just say “no”)

2. How could you work more efficiently within your timeframes? Examples: having faster processes for email, overall organization

3. What would an ideal advising day look like for you? What could you accomplish? How can you make this happen?
Designated Project Time

The University Advising Center opens at 8:00am but does not start to see students until 8:30 – this allows all advisors the opportunity to check email, work on projects, etc.

- You may consider taking student appointments a half-hour after you arrive, if you do not do this already
- The end of the day is another opportunity for project time – students are not signed in after a half-hour before the UAC closes (for example, 4:30pm on a day that the UAC closes at 5:00), so if advisors do not have students at this point, then it also becomes project time
- Rotating project time for advisors

Decide when/if you can schedule project time for yourself.
Email – It Never Stops!

- You have email sitting in your inbox when you get to work – and it just keeps coming.
- How many emails do you have sitting in your inbox?
  - Less than 50?
  - 100+?
  - 250+?
  - 500+
  - 1000+?
  - You don’t know and it’s better that way?
Relaxing or Chaotic?
Your Email

- questions, concerns, unreasonable requests from students
- academic updates
- administrative issues
- other

• How many are new/unread?
• How many have you looked at and did not respond to?
• How many have you responded to and have not removed from your inbox?
• How many are weeks, months, or even years old?
How to Manage It

Create an email schedule for your day that you can stick to (or at least specify at what points you will check your email).

- First 30 minutes of your day, last 30 minutes of your day, and/or a few minutes here and there (between student appointments, meetings, etc.)

You’ve Scheduled Time for Email – Now What?

- Prioritize – get rid of junk mail first (spam, listserv emails with no important content).
- Organize – what do you need to answer first? (email from administrators, more urgent student issues)
- Start from the top if you think that you can process all of your email that day
- Email signatures for common student questions – great time-saver! (handout)
Out of Office Replies

• Not just for when you’re out of the office/when your institution is closed for holidays
• Use for busy times, or just year-round to acknowledge to the email sender that you received their email and will respond to them as soon as you can

Example:
• “Your email has been received. Due to the high volume of phone calls and emails I am receiving right now, please allow 48 business hours for my response. Thank you for your patience.”
Email Folders

• Leaving email sitting in your inbox after you’ve read or responded to it is clutter

• Have folders for your inbox
  • Examples: Student Emails, Academic Issues, General Office Stuff
  OR you can just have a “Processed” folder that you stick emails in after you finish with them, and you can search it later to find something that you need

It only takes a split second to drag an email out of your inbox, and the reward of seeing an uncluttered inbox is well worth it!
Relaxing or Chaotic?

@mavs.uta.edu>

Follow up.  Start by Friday, January 18, 2013. Due by Friday, January 18, 2013. Extra line breaks in this message were removed.

Sent: Thu 1/17/2013 6:10 PM
To: Milam, Emily

Hello I am a student majoring in Psychology. And I was wondering if I took the B.S., degree plan, That both BIOL1433 and BIOL1441 counts as separate hours For the 15hrs of science required, or it doesn't...
SPEED BUMP
Digital Clutter

- What’s in your Documents/personal drive/office shared drive?

- Is everything scattered or organized into folders?

- Do you have trouble finding what you need in your documents?

- Do you often refer to your parts of your institution’s website, but it takes you time to find what you’re looking for?
Readily Accessible

- If you don’t have your digital files organized into folders, then it’s definitely something to consider
  - Have folders for degree worksheets, student degree plans, your projects, etc.
- Archives folder – stuff you don’t need/use anymore but you MIGHT need it in the future
- Spend some time each week/month clearing out unneeded files/folders and categorizing and organizing what you do use – saves time in the long run!

INTERNET

• Have your most-visited websites saved to your Favorites in your internet browser
  • If you have a lot of Favorites, try to organize them into folders (academic policies, catalog bookmarks, etc.)
SPEED BUMP
Student Appointment Logistics

• Student appointments/walk-ins are a given for advisors – that’s what we do.
• How do you manage these AND everything else that you do?
• How are students making appointments with you?
• If you make appointments via email and/or phone, how much time are you spending doing this?
Appointment Scheduling Tips

Online appointment systems (TimeTrade, AppointmentPlus)

- Put on advising/department website and in your email signature
- Send link to students when appointment requests are made (make this one of your email signatures)
    - Great way to save you time!
- Great way to save time
- Possible barrier: cost

*If you’re more old-fashioned or your office/dept. doesn’t have the money for online scheduling: use scheduling sheets outside of your office*
SPEED BUMP
Not Having Written Processes/Procedures

• Do you sometimes forget what to do in unusual student situations?

• Do other advisors in your office often need to ask each other what to do about student issues/procedures?

• Do you believe that some of your processes are not efficient, but you can’t seem to identify what aspect(s) to change?
Having Processes – Write It Down.

- Documenting your processes can help you to identify ways that you can be more efficient.
- Documentation can also help people who assist you and your predecessors – let people inherit your fantastic organization.
  - Examples of process documents:
    - How you handle student traffic (Appointments and/or walk-ins? What is the process for students to make an appointment and/or walk in? How do you see prospective students?)
    - Format for particular types of advising sessions (general registration, graduation, etc.)
    - How you manage/organize student information, both digitally and physically
    - How to sort grade reports
    - Communication plan (mass emails to students – progress reports, etc.)
SPEED BUMP
Messy Office

- Do you have stacks of papers and files on your desk that never seem to go away?

- Do you knock papers off of your desk when you’re just walking by it?

- Do you have old brochures, resources lying around and old flyers on your wall/bulletin board?

- How many personal knick-knacks, pillows, pictures do you have in your office?

- Are you a candidate for the t.v. show *Hoarders*? Is your office a fire hazard?
Relaxing or Chaotic?
Discover the Joy of Decluttering

• Set aside a few minutes a day or a bigger chunk of time each day, week, and/or month to clear out things you don’t need in your office

• Use methods that people do to declutter their homes
  • Make “toss,” “keep,” and “not sure what I’m doing with this” piles
  • Avoid keeping “I might need this someday” things – you will probably never need your 2008 department brochure if you have a newer brochure
  • You will instantly see evidence of your hard work - be proud of your accomplishments (motivation to continue!)

Avoid replacing or adding to the clutter!
Clearing Out the Paper

- Decide what you need to keep and what’s not important
  - Is this available online or on my computer? RECYCLE
  - Does this contain identifying information about a student, and I don’t need it anymore? SHRED (and then recycle, if possible)
  - Do I need to keep this? FILE
  - I’m not sure what to do with this…
    - I may need this later - FILE
    - I don’t know what this is - RECYCLE or FILE in an Archives folder
      - If you don’t know what it is and no one else in your office does either, then you probably don’t need it.

IF POSSIBLE – SCAN! Digital files are easier to manage and better for archiving.
Filing and Sorting - Your New Favorite Tasks!

Have an organized filing system for your forms, meeting notes, etc.
- A few minutes making folders can save you a lot of time/decluttering later

Have a sorting system on your Desk (or nearby) for things that need to be processed, shredded, etc.

Keep information that you often refer to in an accessible place on your desk
- Flip files are great – perfect for having what you need at your fingertips
  - Department locations/phone numbers, readmission procedures, etc.
What Makes a Good Organization System?

7 Qualities

1. Able to find items quickly
2. Items are organized by categories (like items are stored with like items)
3. Easily understandable by someone who doesn’t regularly use it (another advisor or administrative assistant can find something)
4. You maintain the system and it’s simple to maintain
5. Items are categorized consistently (files list students by last names)
6. You can identify broader relationships among the items (all forms are together, student files are together, etc.)
7. The system is able to accept new entries easily

Source: www.unclutterer.com
Relaxing or Chaotic?
Recap

• Our advising lives are filled with different obligations – students, email, projects, etc. – but getting and staying organized can help relieve your stress.

• Tackle one thing at a time – email, digital clutter, physical clutter.

• Create an organizational system that works for YOU and that can help others if needed.

• Make an effort to maintain your organization so that you do not feel overwhelmed during peak advising times.
More Information

- Unclutterer.com
  - Everything you ever wanted to know about organizing

- Zenhabits.net
  - Efficiency, simplicity
Finally, simplify.

• “Our life is frittered away by detail. Simplify, simplify.”

- Henry David Thoreau, _Walden and Other Writings_
Questions, Comments?