

Jana Walser-Smith, SAN Director:

... Record. All right. Hello everyone and welcome. I'm Jana Walser-Smith with the State Authorization Network. I have with me Shawn Fields, associate director of accreditation from Post University. And Post University is located in beautiful Waterbury, Connecticut. And Shawn is here today to talk about their licensure program, SANSational Award-winning project. The project is personalized licensure advising and disclosure.

However, before we go further, give me a little bit of latitude to provide some background on the SANSational Award and why we do those. So please know that the SANSational Award were established back in 2015, and they were again established just to recognize the outstanding efforts by SAN member institutions and organizations when they are developing these high quality, comprehensive solutions to challenging state authorization issues.

Their works often recognized by our group are just real day, real life solutions that may meet the needs of other institutions, of course meets the needs of regulators. And most importantly, they meet the needs of students. So these efforts are models for which we here at SAN think that other institutions can implement and would be very beneficial to the distance education compliance community. So again, without further ado, please welcome Mr. Shawn Fields. Shawn.

Shawn Fields:

Good morning Jana. And hello to the people of the future that will be watching this recording. Sure. I just shared my screen, can you-

Jana Walser-Smith, SAN Director:

Can see it? If you want to go into presentation mode. Yeah. Perfect.

Shawn Fields:

All right, so as Jana said, we are most grateful to have won the award for our personalized licensure disclosure and advising process. A little bit about Post University, we're a private proprietary school that was founded in 1890. We were founded in Waterbury, and our physical campus is still in Waterbury. The campus that we currently inhabit, we've had in place since 1968.

And even though the local campus there is beautiful and we have a bunch of students who reside on campus, about 95% of our student body is actually online. And I think it was last year, we had just over 35,000 unique students in our headcount throughout the year.

We offer 58 different programs from four schools, and they range from undergraduate certificates, all the way up to, we have a doctoral program, so we run the gambit in terms of types of degrees. We focus on programs that are very practical, programs that are designed to lead to professions in which our graduates would be able to be readily employed. So we have that sort of career focus with our programs.

And a lot of folks say, "Well, I get deep into the licensure advising process," and certainly we have these conversations a couple of years ago. And there were two reasons for that. One is we actually have a tenant., Post makes it personal, very catchy, and we really think about that every moment of the day. Even though our student might be in Germany, or California, or Alaska, we still want them to feel like they have a close tie with a person at Post, that they're not just a number and they're handled by robots, that people are involved in thinking about their wellbeing, and helping them achieve their

educational goals. And so licensure is at the forefront of a lot of students' minds, and we want to make sure that we were addressing a major point of anxiety for them.

And the other side of things is it's the law, and we'll talk about that as we get into the timeline. Most folks watching this will know about that angle of things.

But I started in Post in 2019, and our policy at the time was if students were interested in licensure, they were solely responsible for figuring out what they needed to fulfill requirements and what they should take at Post to fulfill educational requirements.

They sometimes would consult with faculty. But as we kind of examined things on a case by case basis, we saw students who just didn't understand enough about the process to do the appropriate research, were completing programs and applying for licenses that they weren't really qualified for. A lot of them weren't really just getting that process. We have a lot of first generation students, but especially first generation to grad school. And we find a lot of folks today just don't understand what a profession is.

You hear the term professionally used sort of colloquially, but the idea of a profession where you are legally responsible for something, you have to maintain a license and continue your education, that's just a foreign concept to a lot of students.

So we were thinking about making some changes to our advising at that time. But also as I'm sure you're aware, there were regulatory changes that were suggested for 2020. The Department of Ed actually pushed them off to 2021. But a lot of governing bodies like NC-SARA and accreditors started really thinking deeply about, "Schools really need to do more for students to make sure they understand the licensure process and what a degree is going to do for them in that process."

So we like to be at the forefront of changes and stay ahead of the game. In January of 2020, we started advising students across three counseling enrollments. We now have four counseling enrollments, and walk them through the entire process from start to finish. As the Department of Ed officially put their regulations in place in the summer of 2021, we added some other programs related to accounting, and started having conversations about miscellaneous programs like education and criminal justice.

And we merged with American Sentinel University, and that brought over a whole new set of licensure related enrollments with nurse practitioner specialization. So we started advising on those in 2022.

And so we broke down our advising process into three categories really by program. The first category is programs that are either designed to lead to a license, or in which if the student graduates, they're going to need a license to work in the field. So counseling, if you want to be a CPA in accounting, if you want to be a nurse practitioner, that's that sort of top tier of program.

A second category consists of programs that really aren't designed to lead to licensure in any way, but you might have some graduates that want to work in professions that require a license. So education, criminal justice, so different law enforcement agencies kind of falls into that category.

And then finally, there's enrollments that aren't designed to lead to licensure through the fulfillment of education requirements. And they also really wouldn't require a license to work in them. So we have a bachelor of arts in communication and media studies, and that's an example of we really wouldn't have any need to engage with students about licensure in that type of program.

So once we sort of defined those groupings, we set in place our process, which is still in effect today. So the first part is data collection. We don't have any kind of fancy software to do this, and in a lot of ways, we wouldn't necessarily trust bots out searching the web for information from different governing bodies, state sites, and so forth.

So we actively track 721 different credentials. And what that means is our goal doesn't always happen quite at six months, but our goal is every six months to do a full sweep of all the statutes and regulations

related to whatever set of licenses we're looking at. We break them down into counseling, and accounting, or that kind of thing.

And so if we're going to have a conversation with a student in a particular state related to a particular license, we also spot check the moment before we call them. I've found state boards in the middle of changing their rules on the website doing that. So we want to make sure that we have the absolute last minute up-to-date information that we're going to share with the student.

And then there are licenses and certifications that we don't necessarily track actively, but periodically research. So for example, last year, we engaged in a project to research all teacher certifications across the country. So we identified over 4,200 of them. And we don't just look at the initial licensure, we also look at continuing education requirements, and all that kind of stuff.

So once we have our base research down, the second part is engaging with students. So our admissions and advising teams are trained and trained regularly that when they get a question regarding licensure, they're supposed to point the student to the programmatic webpage or catalog page, and then send them over to the credentialing team.

So you see the dog being shushed there. The idea is, and we use this in training, the first rule of licensure is don't talk about licensure. We even ask faculty to be very careful about discussing licenses, because obviously in their teaching, they're going to talk about the profession and talk about different parts of the practice. But even if they're licensed, they might have received their license several years ago, and the rules are now different. And if they're not up-to-date on even today's rules, they might be giving students misinformation-

Jana Walser-Smith, SAN Director:

Wrong information.

Shawn Fields:

And the process is so confusing as it is, we really try to avoid confusing students even further, and try to keep things as simple as possible.

So to show you an example of what a programmatic page looks like, this is actually one of the webpages, and you don't have to see all the details if you can't make it out on your screen. But basically, it has our basic disclaimer language and a link to a state by state chart. And so this page is about accounting. This next page here is actually our clinical mental health counseling licensure by state. There's different licenses even within that field in some states.

So we break it down into what's the name of the license, can you meet the educational requirements solely with post programs or not? What are those programs? And then just some basics about what are the other requirements outside of education to obtain that license. And then board contact information. So that's available and updated to all post associates and students.

So then we get into actually having the student conversation. And this predominantly happens with potential students who are interested in entering one of those top tier category programs in which they're most likely going to need licensure. We do have these conversations with students in some of those other categories, like if a student says, "Well, I'm interested in becoming a police officer," then we'll talk to them. But we don't necessarily outreach every single one of those students.

Number one category, you cannot matriculate into your program unless you've had the licensure conversation with a credentialing specialist. So we work them backwards. We say, "Where are you trying to end up in your life?" And we say, okay, then we get some details, and we talk about things. And

sometimes, we have to educate them about a lot of different types of counseling, or different types of nursing or what have you. And so we work backwards from there and say, "Well, to do those things, you have to be in this particular profession." We talk about where they currently reside and where they might reside in the future. We have a lot of military students at Post and military families, so that can be a complicated conversation, as they don't often know where they're going to be stationed in the future.

And so then we say, "Okay, so if you're trying to get in this profession, in this state, this is the license you're going to need. Here are all of the licensure requirements, including the ones outside of education." Then we work backwards again and say, "Here's their educational requirements. Here's whether or not Post has a program or programs that can help you fulfill those requirements. Can you fulfill them completely with us or not?"

And then we get into talking about those specific enrollments. Often, we expand quite a bit on the conversation they've had with admissions. So we'll talk about scheduling, and the length of the program, field work, if that's part of an enrollment. Even the structure of the courses, what the week looks like, how it prepares you for a license, all those kinds of things.

So again, with the tenant, Post makes it personal. Each student at this point has their own personalized plan of study for what they need to do to obtain the license of their choice. And again, in a lot of these enrollments, not only do they have to have the conversation with us, but they sign a disclosure that we keep on file that says Post cannot speak on behalf of a board or other licensing agency. We can't control the fact that states often change their rules. We're here as advisors and partners, and here's whether or not these programs can fulfill educational requirements in a particular state or not.

And so that's helped us on the regulatory side, when occasionally you have a student that maybe doesn't have the best intentions in their educational process, and they want to say, "You told me I could be licensed and now I'm filing a complaint." And we can say, "Well, we told you you couldn't get the license with this, and in fact you signed a disclosure." That usually takes care of that problem, which is pretty rare, but it's there to protect all the associates and other students as well.

Jana Walser-Smith, SAN Director:

And Shawn, I just want to interject and just ask one question. So are these student conversations by appointment, or is it when a student reaches a certain point in their educational level that it's automatic that this appointment comes up?

Shawn Fields:

So in the licensure related programs... And also I should note we have in the disclaimer language, that this program is not designed to lead your licensure into a particular state. It's pretty rare where you get a state to formally approve you. We acknowledge that clearly, that's why students are in the program. So if you're in counseling or nurse practitioner, or you're an accounting student in certain enrollments, you have to talk to us before you even matriculate.

Jana Walser-Smith, SAN Director:

Matriculate, okay.

Shawn Fields:

So we get those sent over to us by admissions. We'll talk about the follow-up process. They will also come to us via advising later on down the road. But basically, you cannot escape us. We will pull you from your first class if you have not signed a disclosure for me, when you're first entering the program.

It's really important to us that students understand fully what they're getting into. And it's also, again, just a liability thing for the school. We want to make sure that they have acknowledged we all have the same goal moving forward with this. We understand what the plan is, they understand what the enrollment is going to do. And we find that that makes a big difference.

Because again, a lot of our students are working adults. They've got kids, they're often a single parent. They might be working a second part-time job, they're taking care of an ill parent. They just sometimes don't have a lot of bandwidth for delving into new topics, and licensure is an area that they're just not familiar with. So it's kind of staggering, the number of students who would be willing to spend tens of thousands of dollars in years of their lives working on something, without even fully researching if it's going to lead to their ultimate goal or not.

And so we say, "No, no," just in the interest of not being paternalistic about it, but just being their partner. When we call them, we say, "I'm your wingman. I'm going to help you through this. I can advise you and use all of our research and experience with these licensing agencies to help you figure out what's supposed to happen." So they feel like they have a partner going through that and aren't alone, but we make sure that they understand what that process is going to be.

But that is a nice segue into our follow-up. So we don't record the phone conversations, but we put in all of our notes about the phone conversations into our student system. And every email that we send is fully entered into that system.

So we also keep tracking sheets on all this different activity, which we share with our partners in admissions, and advising, and the faculty. So everybody's always on the same page about, does the student have a particular program of study to fulfill a set of education requirements for a license? Yes, it's right here. And so they can all view that, and ask us questions about that if they have any... Sometimes a student will move to a new state or they'll change their mind about the type of career they want to get into. And so anytime throughout a student's enrollment, we're available to have new conversations or repeated conversations with them about licensure.

And we also keep them informed if there's a big change coming. So a state makes major changes to the rules for counseling and clinical mental health, we'll contact all the students who reside in that state and say, "Hey, here's what is happening. Here's what this means for you." Or if things are being grandfathered, "Here's how much time you have to follow through on your original plan."

And we also inform our partners about that. So if a state has a new content area requirement, we'll tell the faculty, "You may want to look at this." We don't tell them what to do with their program, but we'll say, "If you don't have this component, we cannot accept students from this particular state," if they're interested in obtaining that license. And so it's just a giant partnership in making sure everybody is assisting the students to the best of their ability.

And what's also pretty fantastic I think, is that when a student is entering into that sort of pending graduate phase, they're getting close to being done with their enrollment or completing the educational requirements for a license, we will contact them again and have a whole conversation about, "Okay, remember, it might've been a couple of years at this point." Clinical mental health counseling licenses, or 60 credits, 60 grad credits to fill the education requirements. So it can be a long time for working folks.

So we'll call them up and say, "Okay, this is what has to happen. Here's the links to all the board pages, and all the rules, and all the paperwork, but we're going to walk you through it. So at this point, do this. Open up your application. Then when you get your final grades in and you're officially graduated, order the official transcripts. Then do this. You're going to send me this form at this time." And I actually fill

out a lot of the state licensure paperwork. Sometimes we have the faculty involved in that, but I always check all of it before it gets sent out to the state agencies.

And if we have questions for state agencies, I'm usually the one to call them, because we want them to have a central contact point. And also, sometimes faculty members can be very passionate about their subject matter, and they might feel that their program fulfills requirements that it doesn't. And so they might engage the board in a way that's a little more... I don't want to use the term aggressive, but a little more passionate than we would, because we've got no skin in the game with that. We just say to the board, "What is it that you're looking for? How can we fulfill your requirements?" And because we have that steady partnership, we actually have great relationships with a lot of these boards, where they will be very quick to respond to us, very open to working with us in terms of making sure that we're helping people get licensed, because they know our heart is in the right place. So having that stable, consistent channel of communication really helps us with getting students' licenses basically.

And so there's obviously a lot of activity that goes on throughout the year. You might think we have a massive team doing this. Actually, we have four people. And the licensure advising process, and even all that paperwork and everything is only a portion of our duties. We work in the accreditation department, which is part of the larger regulatory department.

So we take this very seriously, and we put a lot of effort and emphasis into this. But we also have to fit it in with our other duties. So it's not like you need a team of 50 people to do this. We're just very disciplined, and we're lucky to have a lot of support from other parts of the university.

Post, the entire time that I've worked here, which will be five years in April I think, they're just obsessed with regulatory compliance. If there's a regulation out there, we're going to follow it. If there's a statute out there, we're going to make sure we're compliant with that.

And so we work for Tom Bryant, who's the vice president of accreditation. He reports to Kimber Summers, who's the general counsel and chief regulatory officer. We have great relationships with academic leadership, and with enrollment leadership and their teams as well, admissions and advising. And everybody wants to make sure the student is getting what they need.

So in that picture there, you'll see Alex Larsson, Melissa Pilloise, and Chrissy Adamczyk. And we sort of specialize and sort of don't. So we want to make sure that everybody is cross-trained, that if someone is out for an extended period of time, we don't have to cease operations. Right now, we're operating with three people. But we do kind of split up the day-to-day work in sort of a normal week. So we'll have one person deal with the nursing enrollments, another deal with counseling, another deal with accounting, and so on and so forth. So that's kind of a brief rundown of our project and program, and I'm happy to answer any questions that you may have about this.

Jana Walser-Smith, SAN Director:

Wow. When we looked at this and reviewed the projects, this was really at the forefront, and I think because of the fact that you guys really pay attention to the student from beginning to end, and then throughout the process. I'm just wondering if a student has a question, it's not their set time for an advising or a counseling session. Can they just walk in or do they have to make appointments? How does that happen? If students come in and say, "Hey, I think I'm moving," or, "I think I'm going to be practicing here." How do you handle those kinds of things?

Shawn Fields:

Yeah, I'm glad you asked that. I think you were asking that before, and I didn't fully address that. The entire team works remotely. And because a great majority of the students are remote, they don't have

to have an appointment with us. In fact, we find that if appointments are made, they half the time aren't kept.

We have the staff really reach out to us more than anyone. So certainly after we've had the initial licensure conversations, students have our direct numbers and emails, and we do have students contact us that way. But they start an enrollment, a couple of years go by, and they don't really remember who they spoke with. Well, they have a student success advisor who is in near constant contact with them, basically. They're the ones that schedule their courses, and address any of their issues, and point them to the right folks.

So typically, our contact requests will come from admissions at the beginning, advising later down the road, sometimes faculty. And they'll say, "You've got questions about licensure. We want to make sure you get those answered. We're going to have you speak to a credentialing specialist." And there's something about our culture today that people, they just want to feel special. They want to feel like their concern has been escalated. Admissions and advising don't report to us. Certainly, we don't want to make them feel like they're being managed, but it's often an advantage for them too. They can say, "Well, you're going to talk to a specialist," and the student says, "Awesome. I feel really special because of that."

And so we prefer not to have warm transfers, because we do spot check the information before we speak with them. And so typically, the associate will send us an email and say, "Here's the student, here's the state, here's what they're asking about. Can you reach out to them?" Then we do so and then keep them in the loop. Whoever's made that request, obviously, they can see all the notes in the system as well.

And we'll look at the notes in the system before we speak with the student, but then we pretend that we never saw them, because we want to hear it from the student. Especially when they're going through the admissions process. A lot of times, they don't even know what they're asking. Although admissions does a great job interviewing them, but they might hear one thing, or that day they're thinking about alcohol and drug counseling, and then the next day they're talking about social work or something. And so we'll kind of walk the student through our questions to make sure we've covered all the bases.

We don't have a hard script that we use, but we do have a modular system in which there's certain things that have to be said in a certain way. And we make sure that folks are specially trained to have that conversation.

So we tell advisors, who often direct them to the Bureau of Labor Statistics or Center for Career & Professional Development we'll say, "Listen, we know that you want to help and you want to be as helpful as possible to this person who maybe you've had as your advisee for a couple years and you have a great relationship. But you are not going to help them if you start just randomly doing your own research or making statements that can't be supported by fact." So that's why we say, "Just stay away from that. Where you can offer them the most help is by sending them to us, and then we'll take it from there."

And again... Well, I shouldn't say almost all the students, but the great majority of students are really excited about having these conversations, because they really do have this lifetime goal to obtain this license. But every once in a while, you get someone who's just in to fiddle around, and then try to get somebody to pay them. They want to file a complaint to get their loans back or what have you. And we're conscious that those folks are out there, although in small numbers.

And so this is a protection for not just the associates of the university because we're all in something together, but for other students. If you're constantly having to defend yourself against these things,

you've got to pay for people to do this. And then your tuition goes up. And we work really hard to keep our tuition down.

And so this allows us a clear path that a lot of governing bodies are familiar with our process, and we can say, "Look, this is what the student agreed to." There's no question. And we're very careful about making promises. And so controlling that language and that conversation allows us to not waste a lot of time on frivolous issues.

And even sometimes, the students just forget what you talked about a couple years ago. And it allows us the opportunity to say, "No, remember, this is what you wanted to do. Here's your own email that you sent." "Okay. I was confused." We go, "That's fine." It's a process that causes a lot of anxiety for students, and we get that. So we'll have as many conversations as they need to get them to the point where they're comfortable with it.

And we even go the extra mile when they're getting ready to file for licensure. A lot of them have test anxiety, so we walk them through, "Well, this is what your licensure related exam is going to be like." And we kind of coach them through that process. And it's really rewarding to hear back from students that, "I never even knew about licensure. I didn't even know what a profession was. And because of all of the assistance that I got from all of these caring people at Post, I was able to obtain this goal that I thought was impossible. And I've passed it. I didn't think I could pass an exam. I did. I didn't think I'd be able to finish 60 graduate credits. And I did. I didn't think I'd be able to get this license."

And we've had people tell us, I'm thinking one student in particular was telling me, "I'm from a neighborhood where people didn't even finish high school, so forget about college. Totally forget about grad school. I didn't even know what that was. And because I received all of this personalized support and guidance, and somebody was there for me every step of the way," without making promises, without saying, "We can guarantee you're getting this license." We just say, "This is where you find this information. Here's how you understand what this is saying."

She said, "So I was able to get through my undergrad program. I finished a graduate program. I am now licensed, and now I can go back to my community and teach people not only can you be successful, but I can help them." In this case, this was a counseling student. "Now I can help them with their mental health issues as well, in my own community." And I thought, "Wow, that's pretty amazing."

Jana Walser-Smith, SAN Director:

It is.

Shawn Fields:

A lot of times when you're dealing with regulatory stuff, you don't get to hear the success end of things. And so it's pretty awesome to hear back from students saying, "I have that license. I got the email. I got my certification," or what have you. So that keeps me motivated throughout. Yeah.

Jana Walser-Smith, SAN Director:

Very fulfilling. Well, when thinking about implementing something like this, what would be your biggest piece of advice to another institution who may want to do something like this? Talk to me about some struggles or some barriers and things that people can look out for, and maybe even where they should start.

Shawn Fields:



Yeah. And I can see where the biggest issues would arise, is just the coordination of this across different university departments that on the sand calls, which are fantastic, and other programs put on by [inaudible 00:33:15] and [inaudible 00:33:16] and all that kind of stuff. You hear a lot of folks saying, "I'm a one person office and I'm under some department that doesn't have a lot to do with academics or some of these other groups, and it's difficult to get people to listen to me." That was the key for us right at the beginning. Again, we have a very strong regulatory culture, and so sort of automatically, people are attuned no matter what their department they're in, "Hey, let's check with regulatory. Before we make this flyer, before we send this email out to students, regulatory has to see this."

And because that's sort of ubiquitous, we didn't have to make as much of an argument. But it was a step up, it adds another step to the admissions process.

And so we had to meet with folks, and make sure that each group was included in the launch of this. So operations, academics, admissions, advising, all had to see the value of this, and to agree that this was important for us. And you say, "Okay, at least just [inaudible 00:34:25], let's try this out." And then pretty quickly, you can see the results of it, that for faculty, they're saving a ton of time. Because while we always consult with them about licensure related issues, whether it's a program of study for a student, or the interpretation of a regulation, or recovering that with coursework or not, they no longer have to be the point people for those conversations in which they've got a ton of other things going on. They have some student who doesn't even know what to ask, barraging them with questions about things they're like... And some of these licensure rules, as you know, well, it depends which one you're going for. It depends which subcategory you're applying for. It depends when you matriculated or when you graduated from the master. Totally changed the rules.

So they found a lot of relief in that. Our admissions folks felt a ton of relief over not having to navigate through those conversations without really being able to address the students' questions. So now they're like, "This is so much easier. We could just pass it away." Very quickly, we could show the value of it.

And the challenge in maintaining it is just as you have staff changeover. People retire, people move out of higher ed, people do different things, or get promoted and go to a different job. And you have to make sure that the new folks coming in understand just how important this is, because we do it so differently from other universities. Probably the biggest challenge is when you have a program chair come over from another institution, and they're just used to doing it completely differently. And we have to say, "No, this is why we're doing this. And also, you don't really have a choice. We have agreed to do this. We have made this promise to our students, and we're going to fulfill that."

So that would be my biggest advice about it, was you have to make sure that all the stakeholders are fully engaged in this from the beginning and are supportive of this. And I think while we certainly never want to see more regulation, one of the positives of the Department of Ed being so aggressive with increasing the volume of regulation is that some groups that might not necessarily, were exposed to this before are now starting to get it. When they amp up the [inaudible 00:36:50] defense rules in which they can make their own group and then put 1,000 students in it. And if one student they find was misinformed, they can apply that to the rest of the group. All of a sudden, that becomes very serious to an operations person.

So that environment actually helps us and would help other institutions emphasize just how crucial this is. We're in an environment you cannot make promises that you cannot keep. So we're at the point where we don't even say, "You will learn." Well, unless you can promise every single student that went through that enrollment learned every single one of those components. So we say, "You have the opportunity to learn." Right?

Jana Walser-Smith, SAN Director:

Perfect. Well, Shawn, this was so nicely done, and I'm a little partial to your team. I had a lovely time when visiting there presenting the award. So couldn't have been a better team to be picked for this award. You guys have worked really hard, and that hard work has paid off.

And for that, we are so appreciative, and we are very appreciative of the fact that you're sharing this information out, and that other institutions do indeed have the opportunity to replicate this process. So thank you so much for this, and the time that you spent in sharing.

Shawn Fields:

Thank you, and we really enjoyed your visit. You're welcome back anytime. And thank you to the committee and to SAN in general, especially for highlighting the difficulties of operating in this kind of environment, having to deal with these types of issues. It's so fantastic to have an organization that you can go to when there are a limited number of individuals at an institution who may have expertise in this. So thank you so much for making us a part of that process.

Jana Walser-Smith, SAN Director:

Well said. We appreciate you.