

Ensuring Advisor Success: Mastering the Art of Advising through the First Year of Advising and Beyond

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Handout includes:

- "Slide" pages
- New Advisor Growth Chart
- References / Resources

Presentation Focus:

- Managing *the first year* of a new advisor's development

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Excellent
academic advising
is a complex art that is
mastered over time

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Components of Academic Advising

- Conceptual - addresses our roles
- Informational - what we need to know
- Relational - the communication skills we need

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Mastering the
art of advising
is a developmental
journey

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New Advisors

- must identify the skills, competencies and knowledge they need to develop
- need clear expectations for their development – both long- and short-term goals
- need the tools and clearly defined pathway for achieving these goals

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New Advisor Growth Chart

Enables new advisors and trainers to:

- identify key content, competencies, skills and knowledge
- identify training and developmental goals
- chart growth
- have a framework for training, whether self-managed or through a formal program

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New Advisor Growth Chart

What should advisors know and be able to do in their first year and in year two beyond regardless of their institutional setting or the type of student they advise?

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Create a Road Map for Growth

1. Read the year one and year two and beyond expectations. Try to identify where you (or your new advisors) fall on the continuum.
2. Identify areas for improvement.
3. Plan for and engage in activities that will move you toward the "Year and Two and Beyond expectations."
4. Return to the chart and start over again.

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Two Tracks:

1. how to self manage development in a small advising office where training is limited
2. how to develop or improve ongoing Advisor Development Programs

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Conceptual Component

Context within which advisors work

Answers the questions:

- *What is academic advising?*
- *What is an academic advisor?*
- *What is the role of academic advising at the institution?*
- *What are an advisor's ethical responsibilities to students and the institution?*
- *What is the advising unit's mission?*
- *What is my individual advising philosophy?*

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Self Management: Initial Training

- It is crucial for you to set aside time for your development
- Keep a Journal / Notebook

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Action Steps

- Make sure you thoroughly understand your responsibilities – Read job description carefully
- Learn how your job responsibilities relate to your office and institutional missions
- Develop a written definition of academic advising
- Read FERPA guidelines in *The New Advisor Guidebook* or article from the *Clearinghouse*

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Self Management:

Deepening Conceptual Understanding

- Revisit / Revise the definition of academic advising you originally developed
- Revisit your position description and evaluation form
- Revisit FERPA
- Based on your experience with students, write a draft philosophy of advising (purpose, your role, student's role, learning outcomes for student)

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Advisor Development Program: Initial Training

- Discuss what the job responsibilities entail
- Introduce FERPA and other institutional policies or issues that impact advisors
- Create connections between new and senior advisors
- Encourage new advisors to create a personal definition of advising
- Meet with office administrators who can explain the unit's role in the University structure

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Advisor Development Program: Deepening Conceptual Understanding

- Raise the issues introduced during the initial training period at regular training meetings
- Ensure that new advisors understand the evaluation process in your unit

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Informational Component

Self Management: Initial Training

- Identify the most essential information
- Identify your resources
- Organize your resources
- Create your own resources
- Get to know campus
- Chart Growth

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Self Management: Ongoing Development

- Learn from your students
- Keep an Advising Log
- Deepen your knowledge about Campus
- Deepen your knowledge about Courses
- Begin to develop “big picture” explanations for the educational requirements of your students
- Revisit the organization of your resources

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Advisor Development Program: Initial Training

- Coordinate a campus tour
- Review University materials
- Utilize lectures, HR-sponsored events
- Expose advisors to traditions and rituals
- Gear Training/Advisor Development to familiarity level appropriate for advisor experience

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Advisor Development Program: Ongoing Development

- Continue campus tours but begin to visit less commonly visited offices
- Encourage attendance at campus events
- Continue to discuss and explain University structure, particularly reporting responsibilities
- Pay attention to the training methods used to support ongoing development at the 4-6 month period

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Informational Component

Knowledge of Students



Gaining information about students is
*a bit like putting together a jigsaw puzzle:
 The pieces are combined to create a whole
 that is greater than the sum of its parts*
 - Susan Kolls (p.59)

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Self Management: Initial Training

- Gather information about your students (student data)
 - ✓ Who are the students at my institution?
 - ✓ Who are my advisees?
 - ✓ Are there sub-populations of students that may have special advising needs?

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Self Management: Initial Training

- Put information in an Advising Context (Exercise)
 - ✓ Gather information
 - ✓ Develop Profile
 - ✓ Prepare for appointment
 - ✓ Review

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Self Management: Ongoing Development

- Deepen understanding of your students through your—or others—experience with them
- Learn about student development theory and gradually add to your research-based knowledge about students
- Deepen understanding of the advising needs of sub-populations

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Advisor Development Program: Initial Training

- Ascertain familiarity with developmental theory
- Expose to a few critical ideas and theories on the college student experience
- Exposure to students through observation of appointments, case studies, discussion with veteran advisors
- Help advisors gather information about their students

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Advisor Development Program: Deepening Understanding

- Continue exposure to developmental theories
- Encourage participation in Advisor development programming that expands knowledge or comfort zones
- Continue observation of appointments, discussion with veteran advisors

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Relational Skills

Self Management: Initial Training

- Read about necessary relational skills
- Observe conferences: even if they are in other offices
- Work through case studies

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Self Management: Ongoing Development

- Ask to be observed by your supervisor or veteran advisor
- Attend Annual and Regional NACADA conferences
- Seek opportunities to learn more about relational skills you have identified for further development

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Advisor Development Program: Initial Training

- What are the components of an effective advising session?
- Observe and practice relational skills during training through case studies, role plays
- Observe veteran advisors' appointments
- Become exposed to key points from relational skill literature

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Advisor Development Program: Ongoing Development

- Continue exposure to veteran advisors' skills
- Use case studies in Advisor development meetings – mix veteran and newer advisors in small groups
- Encourage professional development activities that build these skills

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Relational Skills

Conducting an Advising Session

Self Management: Initial Training

- Read about Advising Sessions
- Observe experienced advisors
- Put your reading and observations to work
- Use Case Studies

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Self Management: Ongoing Development

- Use your Advising Log
- Ask to be observed
- Observe an experienced advisor
- Return to your research resources

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Advisor Development Program: Initial Training

- Observe advising appointments
- Supervise/heavily support initial meetings with students
- Ensure that advisor has clear sense of purpose of meetings

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Advisor Development Program: Initial Training

- Allow for debriefings between appointments or after busy days
- Make sure advisor knows what is next in the University calendar – and that the advisor is able to answer key questions
- Encourage advisor to develop strong organization skills and structure for handling electronic and print materials

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Advisor Development Program: Ongoing Development

- Stress the intangibles once advisor appears to have basic concepts down
- Observe their appointments with students
- Challenge advisors to leave things “in their toolbox”
- Encourage advisor to reevaluate effectiveness of organization skills & structure

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Considerations for Managing First-year Development Program

General Considerations:

- “Multiple Journeys”
- Set limited initial goals
- Map out activities
- Set new goals
- Consider annual calendar

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Developing a Self-Managed Plan

- Set aside scheduled time for developmental activities - including self reflection
- Create the master advising calendar
- Use the Advisor Growth Chart to identify your top priorities for growth
- Identify activities that will help you reach your goals

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Developing a Self-Managed Plan

- Keep an advising log
- Reflect on what you have learned and how you have grown
- Build a Resource Network
- Ask questions
- Build feedback into your plan

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Developing a Year-Long Advisor Development Program Plan

- Ask: *Who do you hire?* and *What is the job?*
- Be clear about your training process during your search and early days on the job
- Understand the initial feelings that new advisors experience
- Use a variety of training techniques

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Developing a Year-Long Advisor Development Program Plan

- Create/nurture office environment in which everyone participates in welcoming, encouraging, training, mentoring, guiding
- Seek feedback from new advisors regularly
- Regularly assess effectiveness
- Constantly tinker, improve, learn, and utilize NACADA resources to increase effectiveness

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What will be your next steps?

1. Go back to the four steps we outlined for creating a developmental road map—identify areas for growth
2. Jot down potential action steps for development
3. Rework the Chart—make it your work, fill in the specifics of your own institution
4. Integrate NACADA and its resources into your growth plan

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New Advisor Growth Chart

Conceptual Framework	Year One	Year Two and Beyond
Role of advising and advising center in the institution	Reads, discusses, and understands CAS standards ^a , NACADA Statement of Core Values of Academic Advising ^b and NACADA Concept of Advising	Annually reviews CAS standards, NACADA Core Values, as well as institutional and office missions as means of improving individual, office, and campus-wide advising.
Institutional and office missions	Reads institutional and center missions. Conceptually understands how academic advising relates to those missions.	Same as above.
Job description and evaluation	Understands how job description relates to institutional and office missions. Requests or is provided feedback throughout the first year. Has clear understanding of office expectations and evaluation system.	Uses feedback from evaluation tools to set goals for professional growth and improvement. Uses opportunity to provide feedback on evaluation process as appropriate.
Family Education Rights and Privacy Act (FERPA) ^c	Is trained on and has basic understanding of FERPA. Asks for clarification if in any doubt about specific situations.	Applies FERPA with few questions.

Identify Your Goal(s):

Identify Your Action Steps:

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New Advisor Development Chart

Advising Knowledge: Institution	Year One	Year Two and Beyond
Policies, regulations, procedures, and deadlines	Knows or knows where to find and explain to student basic (most important, used, likely to impact student) institutional policies, regulations, and procedures as well as is able to show or tell students about important deadlines.	Knows basic policies, regulations, and procedures. Understands nuances and varied interpretations of basic institutional policies. Knows the basis on which exceptions and appeals are granted or denied as well as the process and deadlines for appeals. Knows or knows where to find specialized (pertaining to specific student populations, majors, colleges, or programs) policies, procedures, and regulations.
Major, minor, and certificate program requirements	Knows or knows where to find the requirements for the majors and programs for which one has advising responsibility. Is able to outline requirements and course sequences to students using resources. Seeks information from appropriate faculty and staff for exceptions or unusual course sequencing.	Knows requirements for the majors and programs for which one has advising responsibility. Outlines requirements clearly and succinctly as well as develops plans to graduation, including exceptions to standard course sequencing. Is able to combine multiple programs in long-term planning and suggests how to enhance major through electives.
General Education Program (GEP)	Understands rationale for GEP and is able to explain to students. Knows or knows where to find GEP categories and is able outline and explain to students (with information visible using resources or with resources visible). Reviews student progress on GEP using monitoring tools. Knows or knows where to find list of courses that satisfy GEP. Has course description knowledge of GEP classes.	Understands the GEP program and is able to explain its importance to students with specific reference to students' individual programs of study. Knows GEP categories, outlines and is able to explain how the GEP meshes with programs for which one has advising responsibility. With more detailed knowledge about individual GEP courses, advisor is able to make suggestions to students about courses they can use to explore for majors, build foundations for professional school, and enhance their majors.
Courses	Has general knowledge (course descriptions) about courses in majors and programs for which one has advising responsibility. Knows where	Has detailed knowledge about courses in programs for which one has advising responsibility, including how course content

	to find course descriptions for GEP classes and elective courses. Knows or knows how to find prerequisites (courses, placement scores, year in school) for courses in programs and is able to help students plan subsequent semesters.	and format vary among professors; course expectations; student pool in specific courses (e.g., upper level, mixed graduate and undergraduate); prerequisites; and how each course meshes with other courses in the program and fits into a balanced schedule.
University resources: counseling, disability services, tutorial or learning labs, student organizations, student health, career center, services for specific student populations	Knows or knows where to find referral and contact information about campus offices. Is able to explain (with information visible) service that is relevant to the student. is able to locate office on a campus map for student.	Has detailed knowledge about university resources, how offices operate, and personal contacts in each office. Seamlessly integrates referrals into conference. Is able to target services to the specific needs of each student and prepare student for referral.

Identify Your Goal(s):

Identify Your Action Steps:

New Advisor Development Chart

Advising Knowledge: Student	Year One	Year Two and Beyond
Academic and demographic profiles, as well as retention data for the study body of the institution	Has data-based conceptual understanding of institution's student body: ACT/SAT profile of students (admission standards); average high-school class rank; the geographic and types (rural or urban) of home communities; percent of class resident or nonresident; commuter or residential; gender, and ethnic, racial, and international make-up; and retention average.	Has deep, experiential understanding of the demographics of the student body and understands their implications for advising.
Academic, demographic profiles, retention data, and advising needs for students in caseload	Has introductory level knowledge and understanding about institutional population and individuals for which one has advising responsibility (e.g., knows the specific needs of first-year students with regard to the transition to college, learning college expectations, and so forth, or knows the specific needs of seniors with regard to career referrals, graduate school applications, submitting degree applications, and the like).	Has deep, experiential understanding about the population for which one has advising responsibility and is able to incorporate data and experiential knowledge about population into advising: Integrates and applies knowledge about institution as appropriate for specific student and student populations (e.g., understands that not all open [undeclared] majors are developmentally identical).
Needs of special populations: students of color, at risk, on probation, in honors curricula or other special academic programs, and who are athletes	Has introductory knowledge about needs of special student populations.	Has deep, experiential knowledge about the needs of special student populations; fully integrates knowledge into advising.

Identify Your Goal(s):

Identify Your Action Steps:

New Advisor Development Chart

Advising Knowledge: Tools & Resources	Year One	Year Two and Beyond
General catalog and other university, college, or departmental publications, handouts, and Web sites	Is sufficiently familiar with printed and electronic resources relevant to one's position so can use them efficiently in student conferences (i.e., locate the resource quickly and have frequently used materials bookmarked).	Is extremely knowledgeable about printed and electronic resources. Integrates usage seamlessly into student conferences, teaching students how to use them.
Advising technology: E-mail, student information systems, and degree audits	Learns and is able to use basic functions in advising technology, such as electronic transactions necessary to obtain necessary information about students (grades, ACT scores, current registration) and university resources, conduct student conferences, maintain student caseload and files, make referrals, and exchange information with colleagues.	Has mastered basic functions of advising technology. Uses technology efficiently in advising conferences and to manage student caseloads and traffic (e.g., is able to send specific student populations targeted E-mail). Is able to use advanced aspects of systems effectively (e.g. move easily among multiple technologies within advising session, organize email for efficient access).
Advising tools: checklists, handouts, and degree audits	Is able to locate and distribute handouts to students as appropriate. Uses office handouts (e.g., checklists for specific types of student appointments) in advising situations.	Efficiently targets use of resources to individual students. Fully integrates use of materials in conferences. Develops office handouts as appropriate for new majors, programs, and special student populations.
Organizational system	Develops initial, rudimentary system for organizing information in a way that allows advisor to retrieve information efficiently when working with students via phone, E-mail, or in person.	Has well-developed organizational systems to manage both print and electronic information. Is able to access information quickly when working with students via phone, E-mail, or in person.

Identify Your Goal(s):

Identify Your Action Steps:

New Advisor Development Chart

Art of Advising (Relational)	Year One	Year Two and Beyond
Self-knowledge	Recognizes variety of advising styles among other advisors. Gains insight into personal advising style and own advising voice. May try various approaches to find a good fit for personal style. Identifies and gains insight into personal cultural assumptions.	Fully develops advising style over a period of years. Works to expand approaches to meet needs of individual students. Is able to step outside of personal and cultural assumptions when working with students, colleagues and external constituencies.
Welcoming and supportive atmosphere	Sets students at ease. Verbal and nonverbal behavior communicates warmth and support. Greets students warmly. Focuses on and shows interest in student as individual. Maintains eye contact. Uses active listening skills.	Has well-developed interpersonal relations. Is at ease with advisees and sets advisees at ease. Is careful to remember that each student is an individual. Listens carefully to student questions and concerns.
Student conferences	Is learning to guide a conference effectively and ensures student questions are addressed while covering topics and information that student needs. Stays within time parameters most of the time. Establishes expectations for students to meet (e.g., making and keeping appointments).	Fully integrates relational and informational knowledge and skills in advising conferences. Is able to triage information appropriately for individual students according to their developmental stage, needs, concerns, and situations. Conference flows more conversationally (i.e., is not merely a question and answer session). Integrates teaching aspect of advising into conference.
Effective referrals	Is usually able to match student with appropriate referral and provide standard information (i.e., gained via printed resources and Web sites) to student about referral resource. Seeks information and asks for help to ensure effective match of student and referral.	Has advanced referral skills. Fully integrates detailed knowledge of resources and working knowledge of students to match specific services quickly and accurately to specific student needs. Prepares student for referral.
Interviewing and communication skills: questioning techniques and active listening	Begins to build a repertoire of questions that will solicit solid information from students. Practices active listening.	Has well-developed questioning, interviewing, and listening skills that elicit specific, germane information from students. Is able to read nuances of student reactions and responses (verbal and nonverbal) and responds to them appropriately and effectively. Effective in multicultural communication.

Decision-making strategies	Begins to build strategies for helping students make good decisions (e.g., delineating pros and cons).	Applies various decision-making strategies as appropriate to individual student needs and situations. Seamlessly integrates decision-making discussions in student conferences.
Documentation of advising sessions	Meets minimal office documentation standards. Begins to develop enhancements to documentation (using the AutoCorrect feature in Microsoft, for example)	Has well-developed conference documentation skills that exceed minimum office expectations.
Difficult students and student situations.	Recognizes when expertise is challenged and asks for help with problem students and unusual or exceptional student situations.	Is adept at handling difficult student situations, but consults other advisors and administrators as appropriate.

Identify Your Goal(s):

Identify Your Action Steps:

New Advisor Development Chart

Other Responsibilities		

Identify Your Goal(s):

Example:

Identify Your Action Steps:

Example:

Note. ^a Council for the Advancement of Standards (CAS) (2005). ^b NACADA Statement of Core Values of Academic Advising (2004). ^c NACADA Concept of Advising. Family Education Rights and Privacy Act (FERPA) (Federal Register, 2001).

RECOMMENDED RESOURCES

Print Resources

Folsom, Pat. (2007). *The New Advisor Guidebook: Mastering the Art of Advising Through the First Year and Beyond* (NACADA Monograph No. 16). Manhattan, KS: National Academic Advising Association.

Schoenberg, R. (2005). *Why Do I Have to Take This Course: A Student Guide to Making Smart Educational Choices*. Washington, D. C.: Association of American Colleges and Universities.

Electronic Resources

CAS Standards for Academic Advising:

http://www.nacada.ksu.edu/Clearinghouse/Research_Related/CASStandardsForAdvising.pdf

The CAS Standards provide a template for developing and assessing a successful academic advising program.

The Mentor: <http://www.psu.edu/dus/mentor/>

The Mentor is an electronic publication that focuses on academic advising. The Mentor offers articles for advising professionals and an electronic forum for discussion of sample case studies, among other terrific features.

National Academic Advising Association Clearinghouse:

<http://www.nacada.ksu.edu/Clearinghouse/AdvisingIssues/index.htm>

The Clearinghouse is the central location on the NACADA Web site for the collection and distribution of information and resources to assist academic advisors.

National Academic Advising Association Core Values:

<http://www.nacada.ksu.edu/Clearinghouse/AdvisingIssues/Core-Values.htm>

The statement of Core Values provides a foundation and a blueprint for outstanding professional practice.

National Academic Advising Association. (2006). NACADA Concept of Academic Advising. Available at

<http://www.nacada.ksu.edu/Clearinghouse/AdvisingIssues/Concept-Advising.htm>

The Concept of Advising is NACADA's statement on academic advising. Developed through extensive member participation, it represents "as many of the current views and philosophies of our members as possible."