



The Advising Office of the Future

January 24, 2018

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GoToWebinar

Today's Presenters



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Claire Robinson, PhD

*Assistant Dean for Undergraduate
Advisement and Director of
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UNIVERSITY OF
SOUTH CAROLINA

25,556 undergrads



Overview of EAB Research

SECTION

1

Where It All Started



*"A new rule has been established that each student shall choose from among the faculty some one who is to be his **advisor** and friend in all matters in which assistance is desired and is to be the medium of communication between the student and faculty. This I like very much..."*



Rutherford B. Hayes,
as a student at Kenyon
College, in a letter home
to his mother in 1840

Meet the Class of 2027

Next Decade of Students Will Demand More From Advising



Generation Z

Recent high school graduates, born between 1996-2011 and entering college after 2015

How Are They Different from Millennials?

- 1 More independent
- 2 More financially savvy
- 3 Have never known a world without wifi

What They Expect of Advising

- Tailored and transparent advice
- Help getting a return on education
- A seamless technology experience



Nontraditional

Adult, part-time, and online students increasing as # of high school grads declines nationally

38%

Of undergrads are over the age of 25

58%

Of students work while in college

1 in 4

Undergrads are raising children

40%

Of students attend school part-time

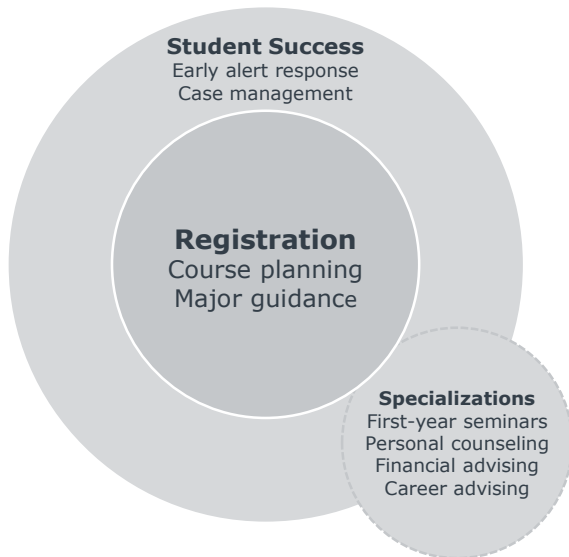
What They Expect of Advising

- A "safety net" monitoring their progress (especially SAP)
- Flexibility in scheduling, communication, and advising approach

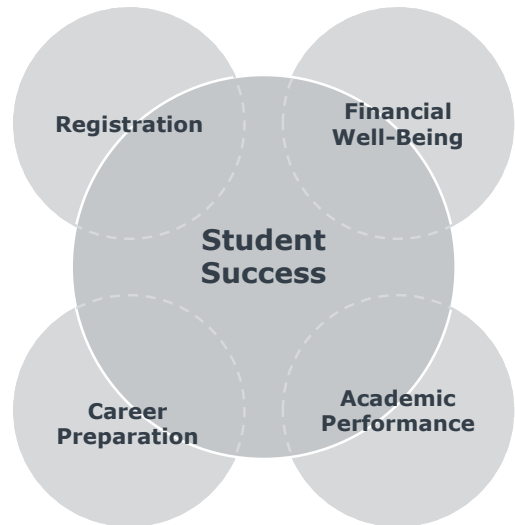
The Shifting Role of the Advisor

Moving Beyond Transactional Responsibilities to More Holistic Care

Traditional Advisors



Success Advisors





The Evolution of Advising in the 21st Century

Looking 10 Years Back—and 10 Years Forward

2007

2017

2027

ROLE

- More clarity around the role of academic advising in student success thanks to the work of **NACADA**

- Role begins to shift from traditional academic advisor to **holistic Success Advisor**

- All advising staff are **Success Advisors** committed to holistic care and **moving the dial**

STAFFING

- Many schools hire **professional advisors** to serve **first-year students** (cohorts of ~500:1)

- Institutions staff up with **more advisors**; new staff undergo **training** and professional development

- Advisors have **strategically-assigned caseloads**; high performers have ample opportunity for **promotion**

TECH

- **Early alert technology** gains traction

- **Advising technology** and **unified records** in place at many schools

- Advisors use an **SSMS** daily and are accountable to **short-cycle student success metrics**

PRACTICE

- “Developmental advising” and other theories well established but **not well connected to practice**

- Advisors begin to run **targeted campaigns** based on risk factors

- Advisors engage in **proactive caseload management**

Growth in Investment (2013-2016)¹

+36%

Advising Staff

+44%

Advising Tech

1) Tyton Partners (2016)

Sources: Tyton Partners, “Driving Toward a Degree,” (2016); Himes and Schulenberg, “The Evolution of Academic Advising as a Practice and as a Profession,” *Beyond Foundations*, NACADA, 2016; EAB interviews and analysis.

What Is the Advising Office of the Future?





1 Strategic Caseload Assignment

How do I set up my advisors for success?



2 Proactive Caseload Management

What should my advisors be doing and how?



3 Metrics to Motivate and Evaluate

How do I motivate my advisors to perform and improve?



1

Strategic Caseload Assignment

*How do I set up my
advisors for success?*



2

Proactive Caseload Management

*What should my
advisors be doing
and how?*



3

Metrics to Motivate and Evaluate

*How do I motivate my
advisors to perform
and improve?*

Why Assign Advisor Caseloads?



Prerequisite for a **proactive** approach and **quantitative** evaluation



Helps shift advisor mindset toward **ownership** of student success



Creates a better, more **consistent** experience for students

Thinking Critically About How to Assign

Smaller, Strategically Assigned Caseloads Are Ideal



Ways to Assign Strategically:

- ✓ By department, major, or **major cluster**
- ✓ By special population (veterans, athletes, first-gen, honors)
- ✓ Larger caseloads with population health mgmt. approach to risk

Other considerations:

- Do caseload assignments support institutional priorities?
- How will you balance specialization against long-term student-advisor relationships?



1

Strategic Caseload Assignment

How do I set up my advisors for success?



2

Proactive Caseload Management

What should my advisors be doing and how?



3

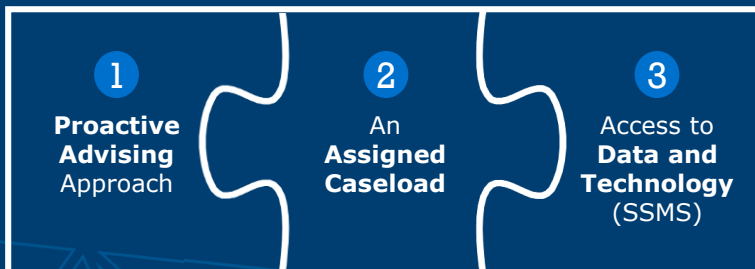
Metrics to Motivate and Evaluate

How do I motivate my advisors to perform and improve?

The Emergence of Caseload Management

Three Factors in Advising Pave the Way for New Approach

Caseload Management



▲
"Proactive Advising involves...**intensive advising designed to increase the probability of student success**, working to educate students on all options, and approaching students before situations develop."

Jan Varney

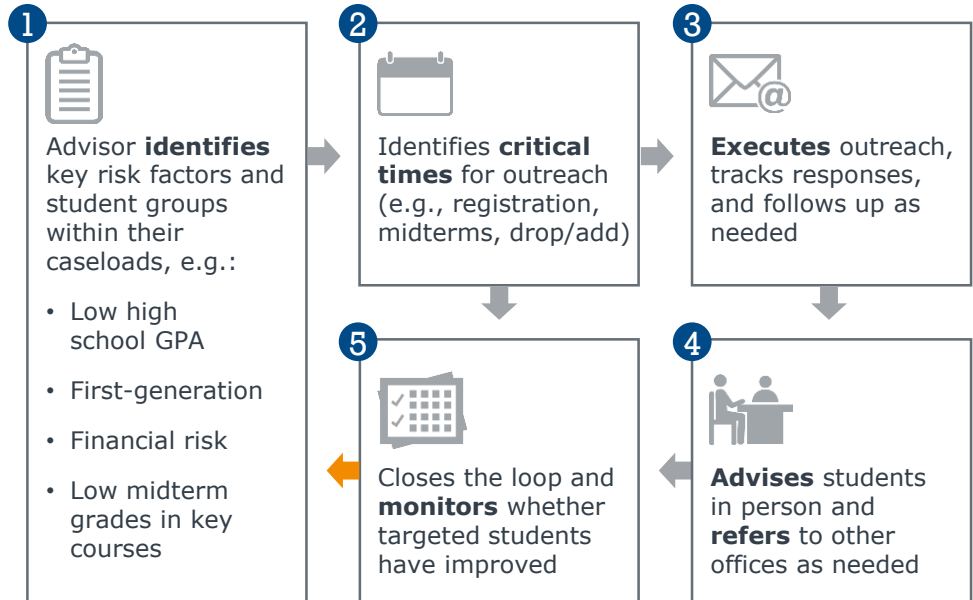
NACADA, 2012

What Does It Look Like?

Comprehensive and Continuous Approach to Student Support

Representative Process

- Advisors **monitor evolving needs** of students in their caseloads
- May have multiple visits with same students and no visits with others
- Advisors **given trust and latitude** to “manage their lists” using all available tools



Setting Expectations Early

Advising Caseload Management Clearly Outlined as Part of Hiring Process

University of Texas at San Antonio

- Large, public research university
- 74% first-year retention, 37% graduation
- Transitioned to a centralized advising model in 2014 with caseload assignments based on major clusters
- Advisors have equitable caseloads that range from 310-360 students

ACADEMIC ADVISOR I Duties (Excerpt)

Advising Caseload Management

Value: Critical to Performing the Job

*Approach to overall caseload management is **data driven, scalable, strategic, proactive, and aligned** with UTSA initiatives.*

- Participates in all mandatory UTSA academic advisor campaigns and meets benchmarks.
- Responds promptly to student-scheduled contacts. Returns emails and phone calls in a reasonable time frame (i.e., 48-72 hours).
- Directs student to campus resources or provides appropriate referrals.
- Reaches out to students who do not attend or cancel a scheduled appointment.
- Documents essential information for all student interactions in Campus in a clear, comprehensive, and timely manner.

Caseload management responsibilities are **standard** across all levels (Advisor I-IV)

Includes participation in **campus-wide campaigns**

Includes explicit expectations for **use of Campus** to document interactions

Document is used during **training** and will eventually form basis for **evaluation**



Since Implementing New Model in 2014

6%

Percentage-point increase in first-year retention

6%

Percentage-point increase in six-year graduation

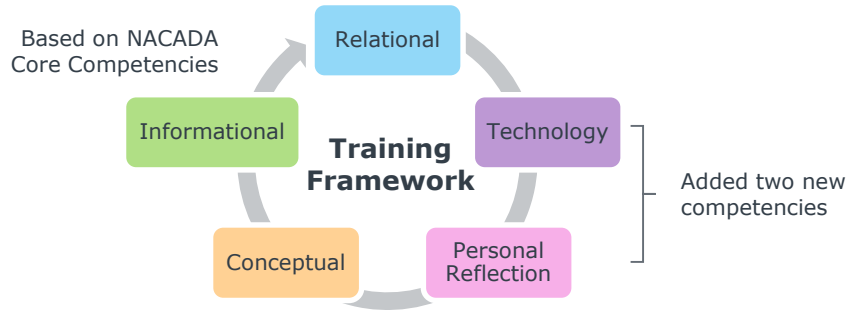


Robust Training for New Success Mentors

Seven-Day Training Program Designed to Set PACT Mentors Up for Success

Mercy College

- Midsized private college in Dobbs Ferry, NY with additional campuses in the Bronx, Manhattan, and Yorktown Heights
- 6,286 undergraduate students, 60.9% Pell eligible
- 42% six-year graduation, 71.8% retention
- PACT Program has 50 full-time mentors with target caseloads of 150



Training & Professional Development Overview



Training Calendar Builds Toward Autonomy



Organizing and Tracking Caseloads, Navigating In-Person Conversations

DAY 1		DAY 2		DAY 6		DAY 7	
Welcome		Settle-In Time		Settle-In Time		Settle-In Time	
PACT Expectations		Team Expectations		Athletics		Advising Article	
Policies & Procedures		Residential Life		SHNS Overview		Shadow Mentor	
Break		Student Life		Break		Break	
Tour		Residential Life		Registrar Review		Shadow Mentor	
Advising Article		Break		Mercy Website/Catalog		Shadow Mentor	
Admissions Process		Campus Resources Round Robin		Lunch		Review Banner Screens	
Admissions Processing				15-to-Finish Best Practices		Lunch	
Lunch		Lunch		Honors Program Overview		Advising Article	
		Career Pathing		EAB Overview		Banner Scavenger Hunt	
HR/Benefits/Tuition Remission		Career Services		Break		Community Standards	
Break		Break		Shadow Mentor		Break	
Overview of Financial Aid		Mercy Connect Overview		Observations & Reflections		Observations & Reflections	
Observations & Reflections		DegreeWorks		Observations & Reflections		Observations & Reflections	
Observations & Reflections		Observations & Reflections		Observations & Reflections		Observations & Reflections	

Competency

- Conceptual
- Informational
- Relational
- Technology
- Personal Reflection

Shadow tenured mentors to observe different approaches to in-person advising and caseload management



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*How do I motivate my
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How Are Your Advisors Performing?

For Many Schools, Evaluation of Advisor Effectiveness Is Lacking

Most Advisors Not Meaningfully Evaluated



45.8%

of institutions reported they have **assessment efforts** in place for advising

(*N* = 770)



21.4%

of institutions evaluate individual advisors according to **job performance criteria**

(*N* = 770)



8%

of advising offices use a **central, institution-wide tool** to assess advisor job performance

(*N* = 1,917)

Not All Measures Created Equal




Pros and Cons of Common Advisor Evaluation Metrics

Qualitative

Quantitative






Student Satisfaction Surveys

-  Often incur low response rates
-  May reflect extreme or polarized views
-  Advisors do not always have influence over student perceptions





Job Performance Criteria (e.g., behavioral competencies)

-  Clearly tie advisor behaviors to role expectations
-  Allow for meaningful career development conversations
-  Not quantitative enough to support effective caseload management






Student Learning Outcomes (SLOs)

-  Require considerable effort to develop; stakeholders often skeptical of SLO data
-  Difficult to track continuously; requires forcing mechanism to review



Student Success Metrics, by Caseload

-  Connect advisors' work to broader institutional goals
-  Motivate and empower advisors
-  May be met with resistance if used punitively

Student Success Metrics by Caseload

Empowering Advisors with Metrics That Support Caseload Management

Guidelines for Metrics



Visible to advisors on daily or weekly basis

Tracked in Campus or a central spreadsheet



Short-cycle

Can be inflected within a semester



Appropriate altitude

Tied to student success but still within advisors' control

Recommended "Sweet Spot" Metrics

Advisor-Student Contacts

% response rate to emails

of advising appointments

of interventions based on early alerts

Student Actions

% of students submitting a degree plan

% of students declaring a major on time

% of targeted students attending tutoring

Student Progress & Outcomes

% of students improving their GPA

% credits earned (vs. credits attempted)

% of students registering for the next term

% of caseload persisting to the next term

“If a student [in my caseload] doesn’t get the help he needs and can’t come back for the next semester, that hurts me personally *and* professionally.”

PACT Mentor
MERCY COLLEGE

Carrot, Stick, or Neither?

Two Approaches to Deploying Advisor Metrics



Informal Approach



Metrics identify lower-performing advisors for **coaching, additional training, or one-on-one conversations**



Metrics help recognize high-performers and **encourage personal growth and friendly competition**

Formal Approach



Metrics contribute to **performance evaluations**, which inform pay and promotion decisions

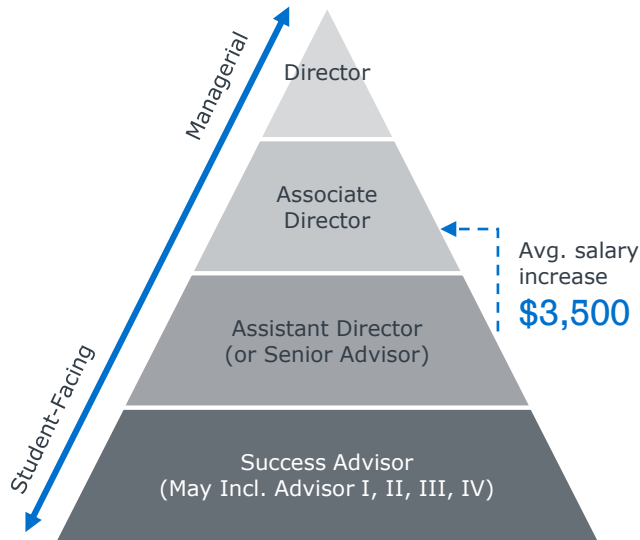
BONUS



Metrics **roll up to program level** to help identify systemic barriers and opportunities for **process improvement**

Career Ladders Reward High Performers

Formal Pathways Critical to Motivating and Retaining Success Advisors



What Good Career Ladders Have in Common:

- Potential for career advancement (signal value more important than large salary increases)
- Tied to competencies and performance metrics, not tenure
- Each step adds new responsibilities (e.g., leading training, participating in working groups, mentoring or managing peers)
- Next step feels attainable (advisors could see promotion every 2-4 years)

Schools With Formal Career Ladders (Partial List)





Re-envisioning Academic Advising at the University of South Carolina



Claire Robinson, PhD

Assistant Dean for Undergraduate Advisement and Director of University Advising Center

SECTION

2

“The quality of academic advising is the single most powerful predictor of satisfaction with the campus environment for students at four-year schools.”
(Kuh, et. al., 2006, p.60)

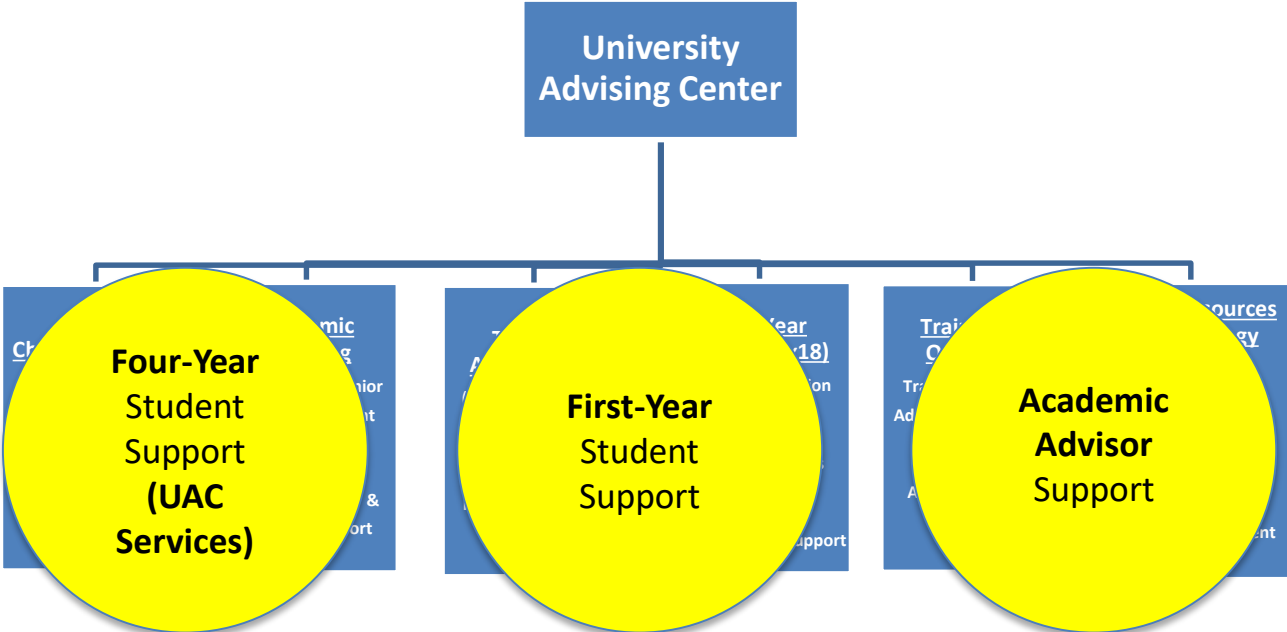


Academic Advising Structure at the University of South Carolina

Shared-Split Model

- 11 colleges and schools
- Advisors include both faculty and professional staff members
- Advising takes place in the Colleges/Schools, University Advising Center, and support offices (OSP) etc.
- 27% of all institutions have a shared-split model (NACADA)



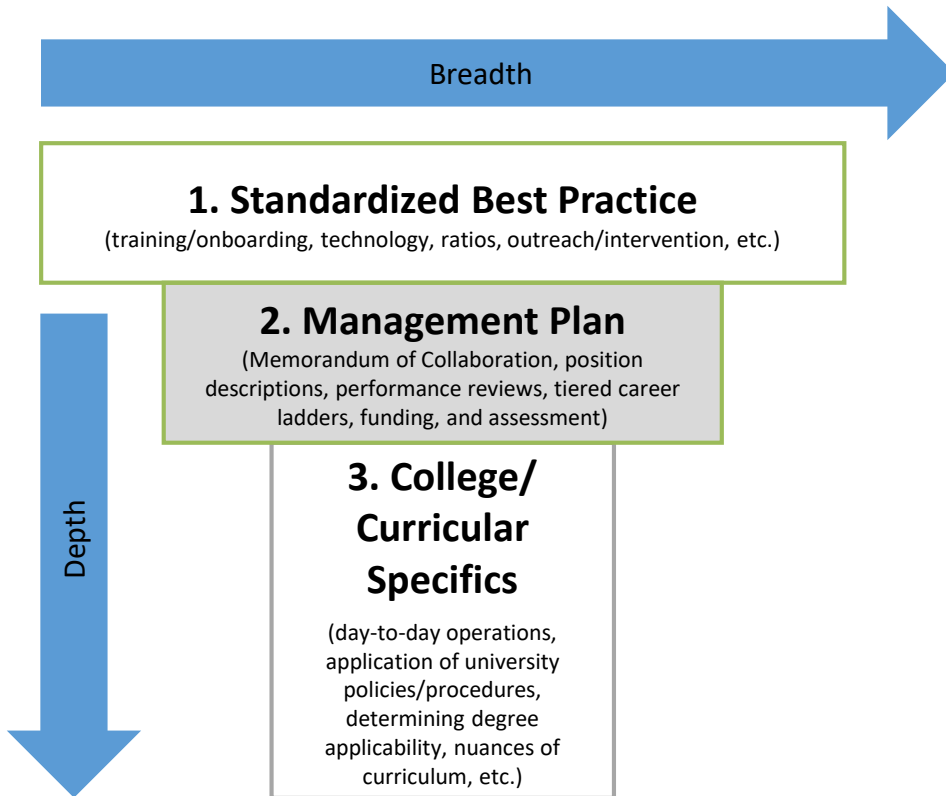


Curricular Complexity Makes Advising More Important (and Challenging)

Institutional Type	Curricular Complexity	Student Preparedness	Typical Advising Challenges
Elite Research Universities	High	High	<ul style="list-style-type: none"> • Encouraging students to take advantage of cocurricular opportunities early in their college experience • Providing students with internships and other opportunities to learn experientially • Supporting sub-populations of students facing success challenges
Access-Focused Public Institutions	High	Low	<ul style="list-style-type: none"> • Assisting students in selecting courses and majors in which they have both aptitude and interest • Identifying students who are off-track or at risk of completion delays, and intervening accordingly
Tuition-Dependent Private Institutions	Medium	Medium	<ul style="list-style-type: none"> • Supporting students who do not meet upper-division requirements for their declared major • Providing students with a high-touch advising experience commensurate with their expectations and tuition dollars
Smaller Liberal Arts Colleges	Low	Medium-High	<ul style="list-style-type: none"> • Ensuring students take advantage of cocurricular experiences and alumni involvement that will enhance their career opportunities • Providing students with a broad education in the liberal arts tradition while also ensuring their career development and readiness • Promoting consistency in faculty advising quality

“Centralization” vs. “Standardization”

Without a “centralized” model, the University Advising Center works towards “standardization” of a decentralized model based on national best practice.



First-Year Advising Management Components

- Standardized FYA **assessment** (e.g. post-appointment surveys)
- Standardized FYA **outreach** (global communications with essential academic information)
- Standardized FYA **caseloads** (300 students to 1 academic advisor)
- Standardized FYA **appointment time** (30 minute appointments)
- Standardized FYA **communication/information dissemination** to advisors (i.e. listserv management, meeting structure, advising directorate group, etc.)
- Standardized FYA **position descriptions** (80% advising, required use of technology, ongoing training, 5% college operations)
- Standardized FYA **performance reviews**

Advising **System** (i.e. all academic advisors) Management Components

- Standardized **technology** (EAB Pathfinder)
- Standardized **training**
- Standardized **access** requirements
- Standardized **position classifications**/advising tiers
- Standardized **student/advisor assignments**
- Standardized **curricular tools** (4-year Major Maps, DegreeWorks, bulletin)
- Standardized **college advisement plan**
- Standardized **appointment scheduling**
- Standardized **student advising checklist/pre-appointment preparation**
 - (pre-advisement checklist, pre-registration checklist, student videos, working towards sophomore advisement module)

Management Tools

- ✓ Memorandum of Collaboration (MOC)
- ✓ Position Descriptions
- ✓ Required training prior to technology access
- ✓ Performance Reviews
- ✓ Assessment

First-Year Advisor Position Description

Academic Advising (80%)

- Average 30 hours per week or 450 hours per semester

Student Monitoring & Technology (10%)

- Maintain systematic and frequent contact with advisees. Monitor, identify, and support students with academic difficulties. Utilize technologies including EAB Student Success Collaborative, Self-Service Carolina, scheduling software, Degree Works, etc.

Training & Development (5%)

- UAC training and certification completion.

Assigned College Operations (5%)

University of South Carolina

Job Description

Job Purpose: The First-Year Academic Advisor provides individual advising to approximately 300 assigned students (first-year students, transfer students, or both) to assist in transitioning to college, academic planning and progression, and engagement on campus. Advisors possess a working knowledge of college curriculums, university policy, and campus resources. Advisors communicate and meet regularly with students, their assigned College, and the University Advising Center. In addition, this position must maintain an average advising schedule of 30 hours per week, manage student caseloads, participate in on-going training and certification, host various outreach events, intervene with students, and regularly use available technologies to ensure accurate and effective advising.

Order of Importance	Functionality	Job Duty	Frequency	Percent of Time
1	Academic Advising	Advise first-year students on progression requirements and selection of courses, provide information regarding institutional policies and procedures, and serve as a primary support resource for advisees. Review and interpret placement and other standardized test scores, transcripts, courses prerequisites, degree applicability of AP, IB, Dual Enrollment, and other transfer work. Perform degree audits, monitor student registration activities, and recommend strategies to assist with academic difficulty. Refer students to the appropriate staff such as counseling, financial aid, etc., and encourage student participation in beyond-the-classroom activities. Participate in orientation and hold advising hours in evenings as needed.	Daily	80
2	Student Monitoring & Technology	Maintain systematic and frequent contact with advisees. Monitor, identify, and support students with academic difficulties as it pertains to progression and graduation requirements. Keep accurate and confidential electronic records of every student interaction including in-person, phone, and online visits. Assist students with resolution of registration issues. Utilize technologies including EAB Student Success Collaborative, Self-Service Carolina, scheduling software, Degree Works, etc.		10
3	Training & Development	Advisors participate in on-going training to ensure information accuracy and effective advising technique. Responsibilities include but are not limited to completion of online modules provided by the University Advising Center (UAC) and Registrar, participation in UAC trainings, and on-going review of assessment reports/student trend data. Advisors must stay abreast of changing institutional information including admissions requirements, new programs, course changes, deadlines, important dates, facilities, college-wide initiatives, and state/federal mandates.	Weekly	5
4	Assigned College Operations	The First-Year Advisor will support the efforts of their assigned College/School such as participating in campus events, developing advising materials and presentations to support individual and group student sessions, and serving as a resource for faculty and staff.	Monthly	5

USC's Academic Advisor

Training & Certification Program

Advisor Competencies

1. Advising Practices at USC
2. University Policies and Procedures
3. Academic Programs and Requirements
4. Advising Technology
5. Campus Resources
6. Undergraduate Students & Special Populations
7. Advising Profession and Practice

Training Curriculum

Adding Competencies	Level I	Level II	Level III	Level IV	
Advising Fundamentals	• Identify the role of the academic advisor • Understand the importance of the advisor role • Understand the importance of the advisor role	• Identify the role of the academic advisor • Understand the importance of the advisor role • Understand the importance of the advisor role	• Identify the role of the academic advisor • Understand the importance of the advisor role • Understand the importance of the advisor role	• Identify the role of the academic advisor • Understand the importance of the advisor role • Understand the importance of the advisor role	• Identify the role of the academic advisor • Understand the importance of the advisor role • Understand the importance of the advisor role
University Policies & Procedures	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role
Academic Programs & Requirements	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role
Advising Technology	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role
Campus Resources	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role
Undergraduate Students & Special Populations	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role
Advising Profession and Practice	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role	• Understand the importance of the advisor role • Understand the importance of the advisor role • Understand the importance of the advisor role



Advisor Performance Review Excerpt

4. **Duty:** Assign a weight from 1 to 100 to indicate the significance of the duty:

10

STUDENT MONITORING/ACADEMIC INTERVENTION: Identify, advise and re-advise students with academic difficulties as pertains to progression and graduation requirements. Responsible for monitoring student progress toward degree and identifying and supporting students with academic difficulties.



Success Criteria:

Maintain systematic and frequent contact with advisees. Respond to follow-up inquiries after orientation. Monitor student records between advisement sessions and identify students with academic difficulties. Re-advise students as needed. Writes thorough student notes after every session. Refer students to academic success resources through EAB software. Tracks grades and degree progression for students with academic difficulties using technologies such as EAB and other appropriate software. Identifies and intervenes with at-risk advisees. Runs reports in EAB, email/contacts students and makes record of outreach efforts. Provide semester and/or annual reports to UAC on successful and attempted academic interventions.

Actual Performance:

- EAB utilization report. Outreach campaigns conducted.
- Starting F2016, FYA provides UAC an intervention report at the end of each semester on successful and attempted interventions. (Actions taken, sample emails, watch lists created, how students were identified, outcomes, etc)
- hours posted in EAB
- Advisor electronic documentation (record student attendance, advisor notes, etc) to include X topics discussed, X referrals made.
- Student survey responses (starting Fall 2016)

Unsuccessful



Successful

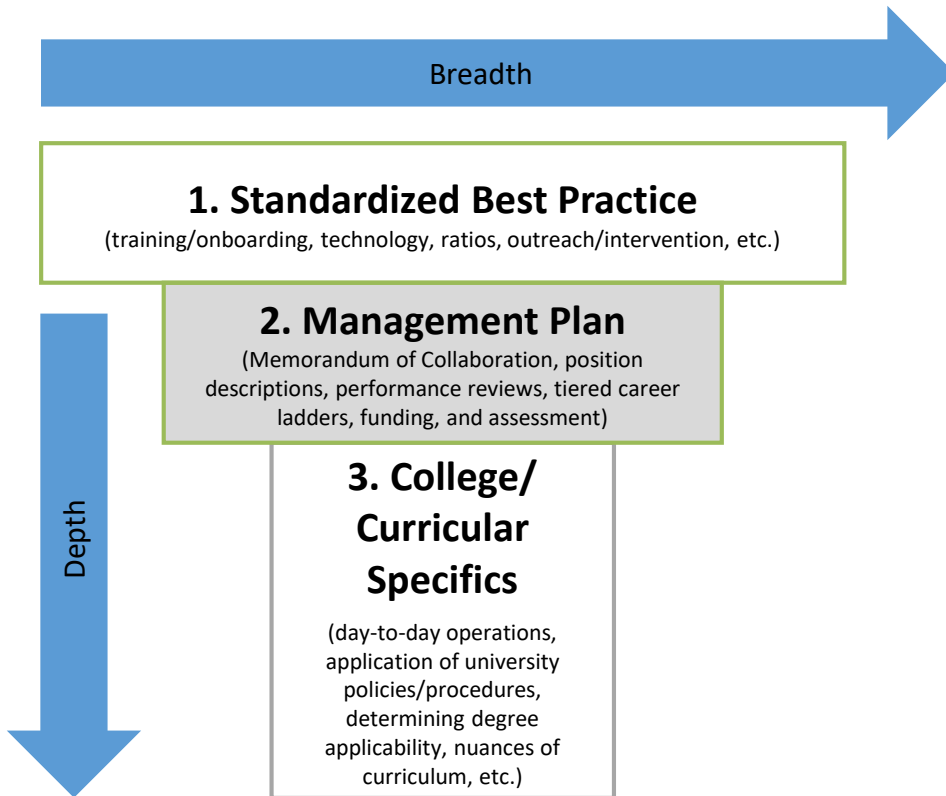


Exceptional



Score

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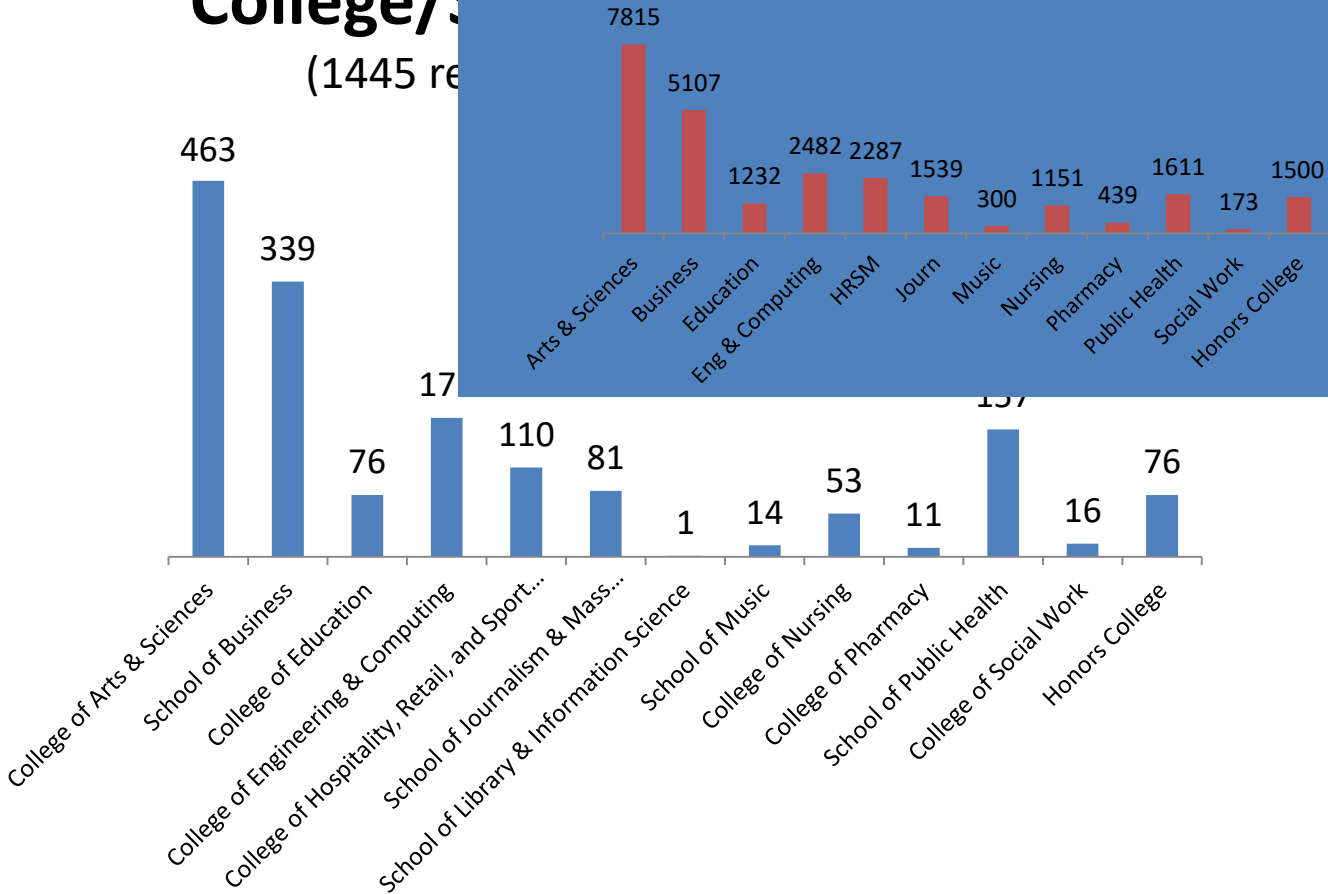
2014 vs 2017

**Student Survey on Academic
Advising Comparison Data**

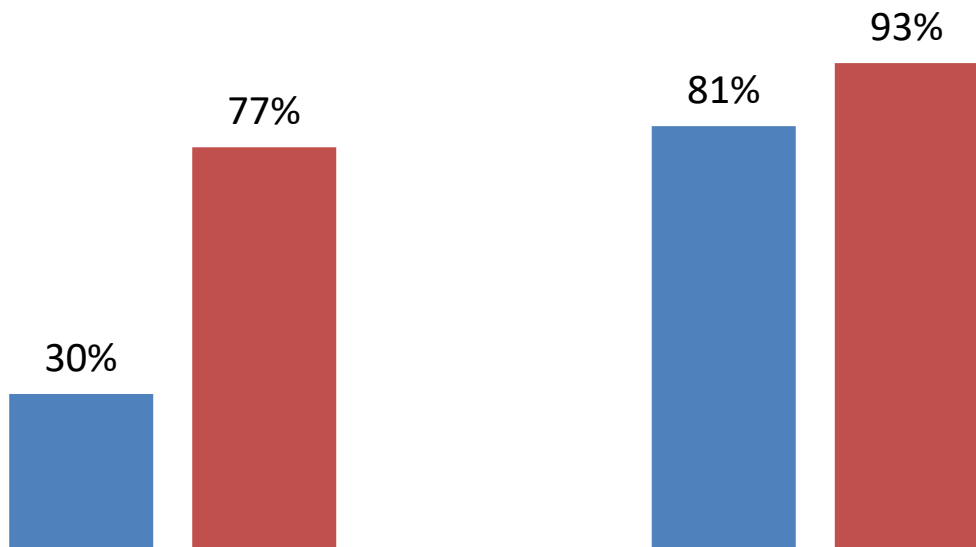
College/School

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Undergraduate Enrollment



2014 vs. 2017: Assigned Advisors



% of undergraduates assigned advisors

I know who my academic advisor is and/or how to get advised in my college or school

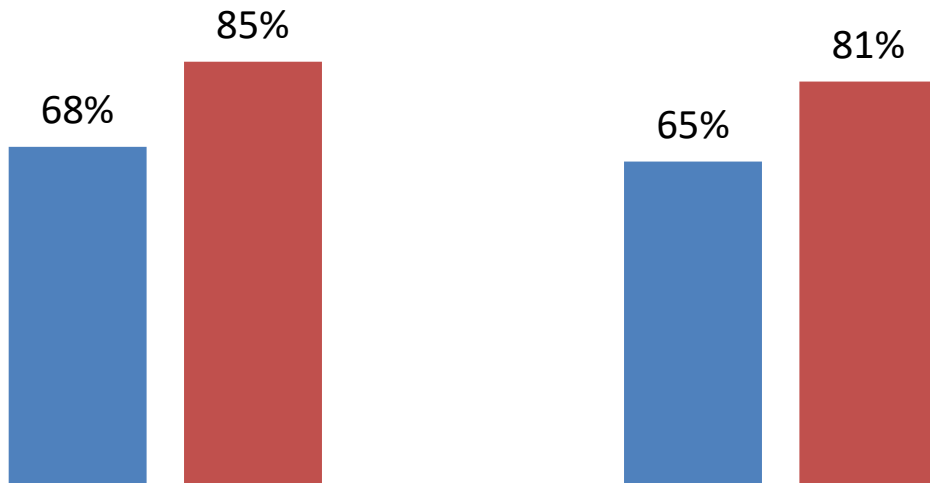
■ 2014

■ 2017

Undergraduate Students & Assigned Academic Advisors

- In **2015** USC-Columbia had **30%** of all undergraduate students assigned an advisor
- In **2016** USC-Columbia had **67%** of all undergraduate students assigned an advisor
- In **2017** USC-Columbia has **80%** of all undergraduate students assigned an advisor (22,439/29,222 students)

Requirements & Accuracy

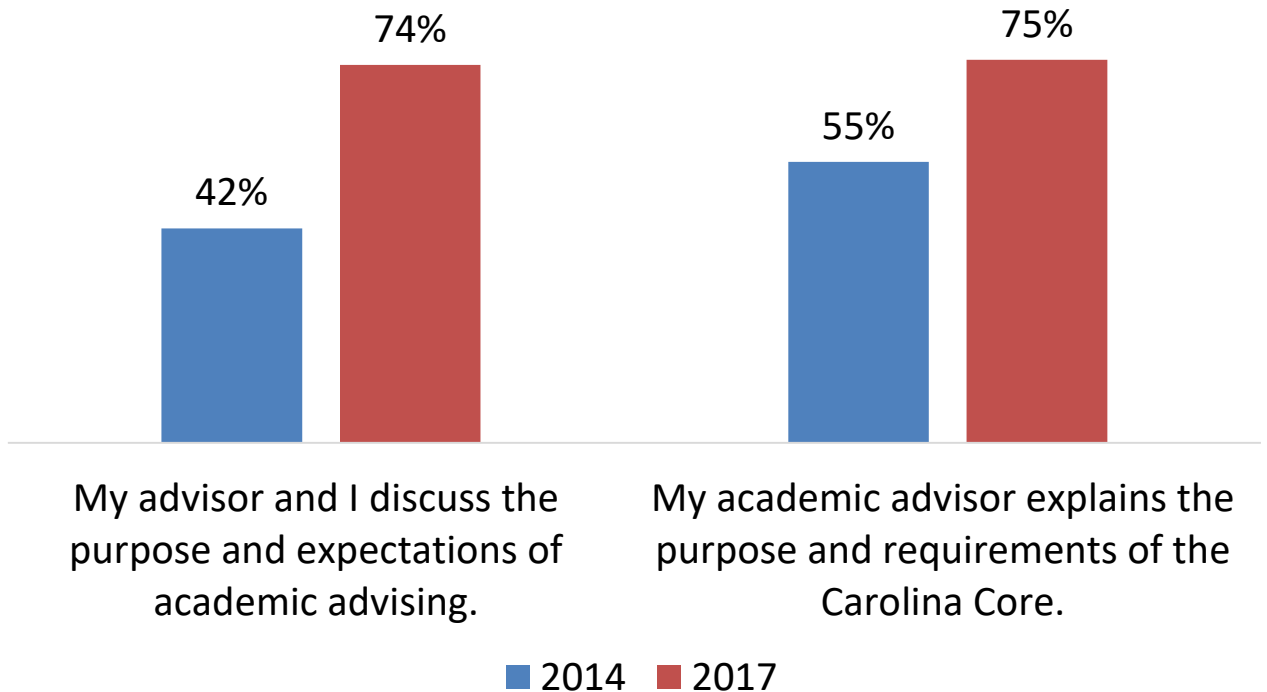


As a result of academic advising, I understand the requirements of my major.

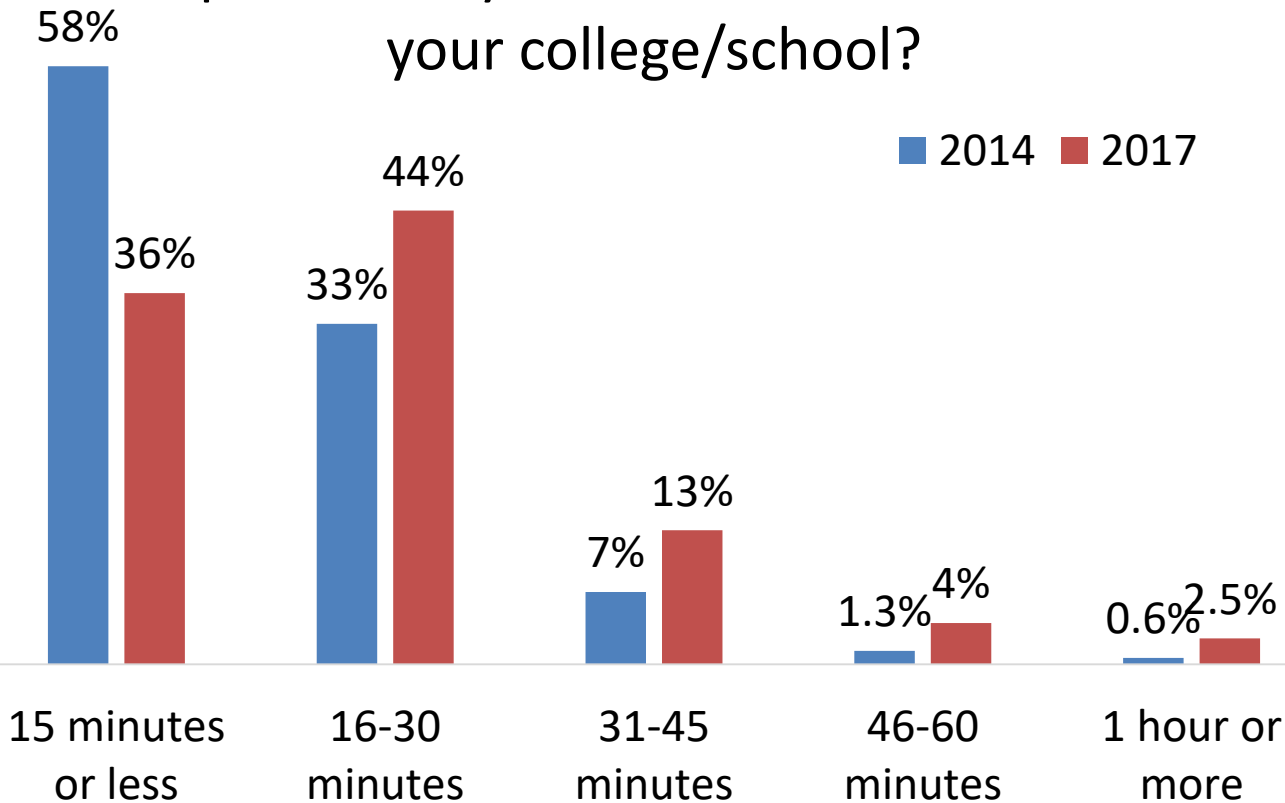
My academic advisor provides me accurate information about courses, programs, and major requirements

■ 2014 ■ 2017

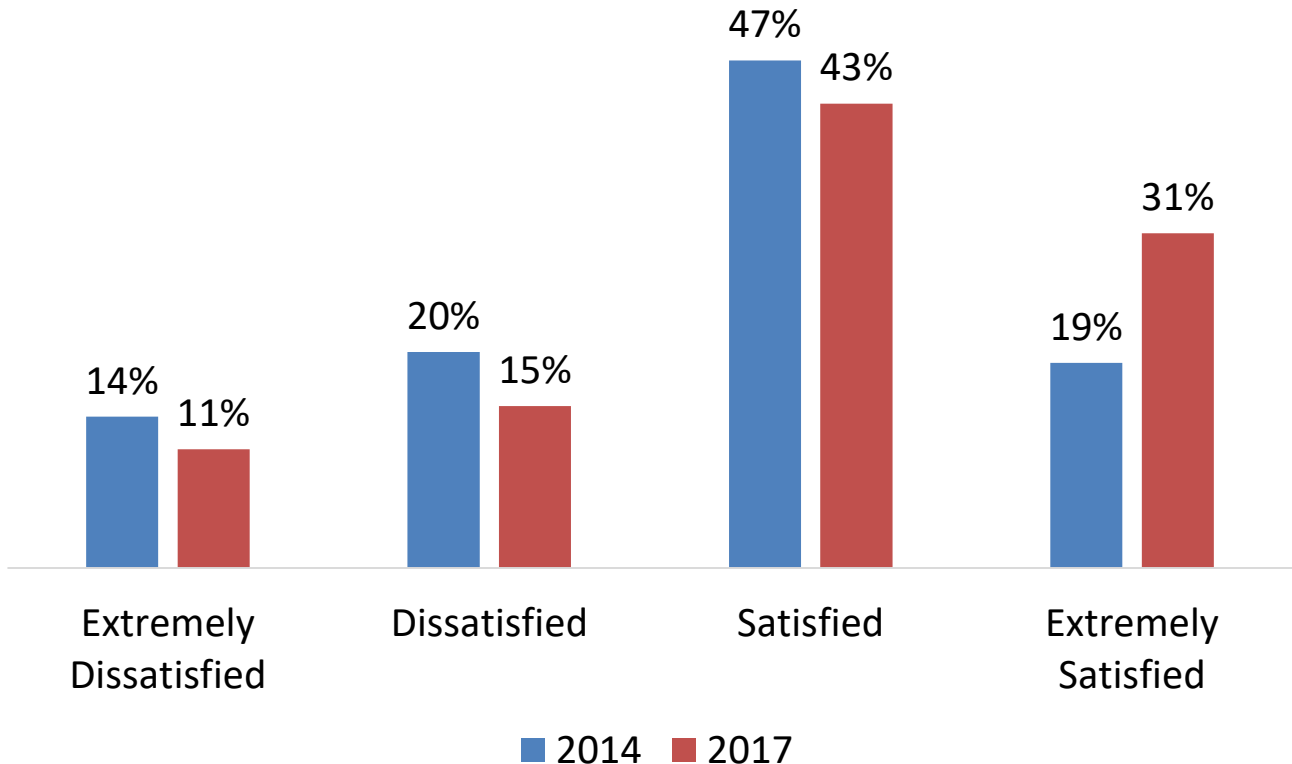
Requirements & Accuracy



Approximately **how much time** do you spend with your Academic Advisor in your college/school?



Overall, how **satisfied** are you with academic advising at USC?





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25,556 undergrads

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THANK YOU!

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