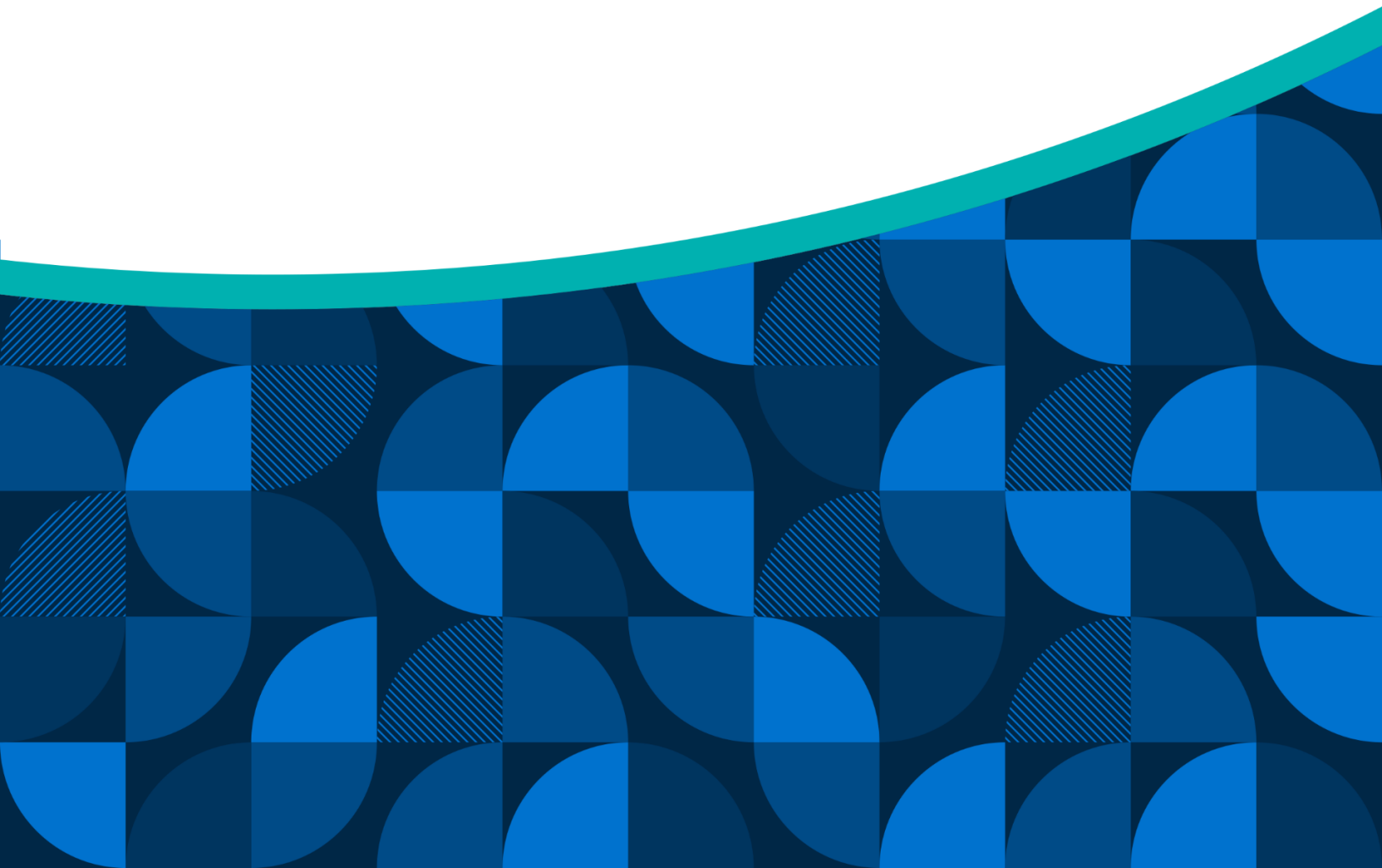




TOOLKIT

Advising MOU Template Builder



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Advising MOU Template Builder

A Guide to This Resource

As students with unfinished learning from the Covid-19 pandemic’s remote instruction arrive in college, academic advisors will see their responsibilities and the needs of the students in their caseload increase. Students will have an even greater need for proactive, consistent advising from staff who deeply understand and can make referrals across a complex network of student support units. At the same time, advising offices are seeing high turnover and facing more challenges in finding qualified staff to serve in senior or specialized roles.

Standardizing advising across units allows institutions to create consistency in advisor responsibilities and caseload sizes, invest centrally in technology that saves advisors time, and develop a universal professional development and career pathway that allows advisors to advance within the institution. To do so, however, leaders must build trust and transparency with academic leaders in college, departments, and other units across campus.

Institutions such as the University of South Carolina and Georgia Southern University have developed **memoranda of understanding (MOUs)** between central advising leadership and college-level leadership to outline the detail of their advising models in writing and ensure that all units on campus agree on their responsibilities and ownership.

The MOUs state the goals and purpose of advising design and codify pay scales, caseloads, and funding splits between central and distributed units. They also set a cadence for ongoing discussion and revision to the advising model.

When executed successfully, MOUs foster strong buy-in and agreement between central and distributed leadership on the standardization, purpose, and goals of advising. To prepare for MOU development, institutions must first make decisions about their advising philosophy, strategy, and staffing and funding model. Ultimately, the purpose of the MOUs is not to replace decision-making but rather to codify those decisions in writing and create a process for their transparent communication and consistent application.



Resource in Brief

Use this resource to inform, write, and self-audit advising memoranda of understanding. Use the Memorandum Element Self-Audit to understand the information that should be included in each section of an MOU template and view example language from the University of South Carolina, then reference an additional example adapted from Georgia Southern University in the Appendix.

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Memorandum Element Self-Audit

Directions:

Memoranda of understanding serve as contracts between central leadership and academic units. They codify in writing the expectations and responsibilities of units, advisors, and administrators. Use the nine elements below to evaluate a draft MOU template and ensure it contains all of the necessary information to foster open and transparent communication with unit leaders. After confirming that all nine elements are present, leaders can then customize the template to include information and agreements specific to each academic unit.

Memorandum Element #1: Context and Mission Alignment

Before establishing specific advising and unit expectations, MOUs should begin by establishing a connection to the institution's higher-level priorities and goals. While the reasons for standardizing advising may seem obvious to central leadership, they can be opaque to unit leaders. Establishing context ensures that advising transformation stays focused on student success and avoids concerns that the institution is primarily seeking to cut costs or graduate more students at the expense of academic rigor.

Does your MOU explicitly state:

- The goal or purpose of the memorandum?
- How advising connects to institutional student success priorities (e.g., increasing graduation rate, closing equity gaps)?
- How advising connects to the institutional mission and/or strategic plan?
- Findings of national, evidence-based research on the outcomes of advising?

Institutional Example

Undergraduate academic advising has been identified as a top priority for institutional improvement. National best practices indicate an advising model with training, expectations, consistent standards, and accountability is one of the best and most efficient mechanisms to improve student retention, academic progression, and time to graduation. The Four-Year Undergraduate Academic Advisors Program requires shared responsibility for accomplishing these goals with a University Advising Center and academic colleges and schools.

In order to promote educational excellence, strengthen academic ties and enhance the first-year/undergraduate student experience at USC, the University Advising Center (UAC) and the College/School agree to engage in a collaborative joint program to provide, as described in *Re-Envisioning Academic Advising at the University of South Carolina*, "a coherent and common standard for Carolina advising." These goals direct support USC's 2023-2028 [institutional priorities and university strategic plan](#). The mission is designed within the framework of the University of South Carolina, the Office of the Provost, Colleges/Schools, Student Affairs and [Student Government legislation](#).

Memorandum Element Self-Audit, cont.

Memorandum Element #2: Standard Staffing Ratios

A common barrier both to consistent student experiences and advisor retention is advisor caseload size. In highly decentralized advising models, advisors often have very different numbers of assigned students between units. When caseloads vary widely, so does the amount of time advisors can spend with each assigned student, building personal connections. Advising MOUs establish standard advisor-to-student staffing ratios by academic unit, reducing or eliminating disparities in caseload between units. The MOU template should include specific information about the staffing ratio (advisors per student and/or advisors per college, school, or division).

Does your policy explicitly state:

- A standard or baseline number of advisors that will be assigned to each college or academic unit?
- The formula or rule that will be used to prioritize assignments for new advising hires?

Institutional Example

Allocation of Advisor Positions: The UAC will allocate undergraduate academic advisors to the colleges/schools based on the following guidelines.

Rule #1: In alignment with the [2015 A.C.T. Recommendations](#), all USC Columbia academic colleges and schools (i.e. 11) will be assigned a FY/Undergraduate Academic Advisor (UAA).

Rule #2: FYA/UAA allocation is based on college/school enrollment. UAA allocation(s) are determined by a 300:1 formula (i.e. 300 students = 1 academic advisor). This formula allows for optimal caseload management. Caseload management includes outreach, intervention, monitoring, etc. See UAA position description, MOC, and management documents.



EAB Insight

EAB does not recommend a specific advisor-to-student ratio. The optimal advising caseload size depends on both the resources available to hire academic advisors and the student body's overall level of preparedness and need. Many institutions have chosen to use the national average advising caseload of 300:1 as a benchmark, but this ratio is not an evidence-based best practice.

Memorandum Element Self-Audit, cont.

Memorandum Element #3: Expectations of Advisors

One of the most common reasons that institutions initiate advising transformation is to address inconsistency. Students often share concerns that advisors in different units have very different approaches to advising; for example, one advisor might meet with students regularly for substantive discussions while another might simply use meetings as a check-the-box signoff on a student’s course schedule. With shared standards and expectations—and a system of accountability and incentives—students know they will have consistent experiences with advisors regardless of their chosen area of study. Shared standards also ensure that advisors understand where to focus their finite time and effort to have the greatest impact on student success.

Does your MOU explicitly state:

- The institution’s advising philosophy or methodology? (e.g., appreciative advising)
- Areas of knowledge where advisors should be subject matter experts? (e.g., credit transfer, first-year course selection, changing majors)
- How often advisors are expected to meet one-on-one with *all* of their students and what topics should be discussed?
- What data points advisors are expected to monitor, and when advisors are expected to schedule additional meetings with higher-need students based on that data?
- Technologies advisors are expected to be familiar with?
- Cadence of collaboration/communication between advisors and college/unit staff?

Institutional Example

Responsibilities of Undergraduate Academic Advisors:

1. Provide comprehensive academic advisement to new and continuing undergraduate students from a specific academic discipline or group of disciplines. “Comprehensive academic advisement” should entail a holistic student approach that includes prescriptive advising (i.e. curricular requirements), developmental advising (i.e. co-curricular opportunities and career readiness), appreciative advising (i.e. narrative inquiry), and intrusive advising (i.e. interventions). Implement a four-year academic advising model to support students from first-year through graduation.
2. Specialize in advising first-year freshman and transfer students including but not limited to an expertise in advising at New Student Orientation, prior credit evaluation (AP/IB/CLEP/transfer, etc.), placement testing (MAP, FLPT), transition to university, guidance in involvement, changing majors, or other considerations that may put first-year students at-risk.
3. Advise approximately 300 students each year. This ratio provides approximately four hours per year for advising, monitoring, and, when needed, intervening with each student.
4. Meet one-on-one with students focusing on degree requirements and course selection, Carolina Core, major and career exploration, academic policies, academic interventions, and *My USC Experience*.
5. Monitor assigned students (advisees) and identify when they are off-track or in need of additional support and make appropriate referrals.
6. Conduct academic interventions and targeted outreach to students at critical points during the academic year.
7. Re-advise students as needed.
8. Maintain up-to-date knowledge on curriculum, University and College/Department policies. Participate in on-going trainings provided by the UAC and the [college/school].
9. Develop understanding of the expertise of Faculty in [college/school], Program Directors, and other faculty partners. Recognize when and how to facilitate student connections with faculty to explore and connect with professional development opportunities. Participate in meetings on advising with faculty.

Memorandum Element Self-Audit, cont.

Memorandum Element #4: Responsibilities of Central Advising Unit

In addition to the responsibilities of individual advisors, MOUs also establish the responsibilities of central advising leadership. A Director or AVP of advising (or similar role) does the ongoing work of upholding shared advising standards through communication, training, and assessment of advising. The central advising unit also helps to ensure continual communication among advisors in different units to discuss shared challenges and solutions. Rather than centralizing all advising staff in one unit (and expend political capital on a typically-painful period of transition) or creating no central unit (and forgoing any accountability for shared standards), a central unit that oversees distributed advisors is typically the easiest way to find compromise in the centralization vs. decentralization debate.

Does your MOU explicitly state:

- Training, development, and/or certification that will be centrally provided, both to all advisors and to specialized advising staff?
- Frequency and type(s) of assessment conducted by the central unit?
- Technologies supported by the central unit?
- Frequency of meetings and communication between the central unit, college/academic unit leaders, advising managers, and/or individual advisors?
- The establishment of a university-wide advising career ladder?
- In what circumstances the central unit will notify colleges/academic units about policy changes or communication?

Institutional Example

Responsibilities of the University Advising Center

1. Ensure advisors are trained and certified through the Advisor Training & Certification program.
2. Provide on-going training and professional development to all Undergraduate Academic Advisors assigned to the [college/school].
3. Implement and monitor specialized transfer advising, outreach, and intervention strategies aimed at retention and graduation.
4. Share in the assessment of advisor performance through the EPMS form/reviewer.
5. Monitor advisor caseloads and jointly review enrollments and the number of advisors assigned to the college each year to enable a ratio of no more than 300:1 (i.e. max 300 students assigned to one advisor).
6. Host monthly or bi-monthly meetings with all UAAs and offer regular communication about institution-wide initiatives and updates.
7. Serve as the administrative home for all undergraduate academic advisors (i.e., All human resources processes will be the responsibility of the UAC, including the advertising, screening, interviewing, position description management, and hiring procedures.)
8. Provide advancement opportunities in conjunction with the College for UAAs through a tiered career ladder.
9. Provide university-wide support of all academic advisors including but not limited to curricular support (e.g. major maps, curricular analytics), technology support (EAB Navigate, DegreeWorks, Banner, Self-Service, MyUSC Experience), transfer student support (early transfer advising, direct transfer-tracks, specialized transfer retention initiatives, major change support (Exploratory Advising), academic recovery initiatives (Academic Coaching, academic probation mandates), advisor communication (listservs, meetings, TEAMS channel), student resources (videos, check-sheets, resources, flipped advising models), administrative support (e.g. hiring, promotions, liaison to HR etc.), and overall guidance and vision for excellent and equitable academic advising at USC.
10. Notify College Supervisor of new or substantially changed university-wide advisor support or training requirements, student academic recovery initiatives, and other advisor and student support services prior to communicating with advisors.
11. Make every effort to notify the College Supervisor before general blanket communications are sent from UAC to [college/school] advisors or [college/school] students.

Memorandum Element Self-Audit, cont.

Memorandum Element #5: Responsibilities of Academic Units

In addition to the responsibilities of advisors and central advising units, MOUs also establish the responsibilities of academic units and their leaders. In signing the MOU, unit leaders confirm they have read and fully understand their expectations. To build buy-in with unit leaders, this section should also include benefits of the advising model for academic units. For example, an MOU might codify that academic unit leaders or their delegates can continue to participate in advisor hiring, so they can have confidence that new hires have the right skills to support their students.

Does your MOU explicitly state:

- Expenses (including specific supplies, space, and materials) to be covered by the academic unit?
- The role of the academic unit in advisor hiring, development, and evaluation?
- Who will supervise advisors in the academic unit?
- The expectation that the unit supports advisors' participation in central meetings, trainings, projects/initiatives, and events?
- The expectation that the unit accepts the provisions of the MOU?
- Percentage of distributed advisors' time that can be allocated to general operations?

Institutional Example

Responsibilities of the College

1. Accept the number of advisors assigned to them by the UAC. If the advisor is located in the college/school, the college will be responsible for providing the following at the expense of the college: private office to allow for appointment confidentiality; furniture equipped for advising; computer, phone, and technology support, including access to a printer, copier, and/or document scanner; office supplies and other necessary materials.
2. Participate in a shared search process for new UAA's including application review, interviewing, and reference checking, with the understanding that the College Supervisor will make the final decision on candidate offers/hiring.
3. Support the UAC Advisor Training and Certification Program with additional mandatory college-specific advising training.
4. Share in the assessment of advisor performance through the EPMS form, with the College Supervisor serving as the primary supervisor/evaluator.
5. Allow undergraduate advisors to shadow and observe experienced advisors in the college during advisement and orientation periods with prior notification.
6. Support UAA participation in university-wide academic interventions managed by the UAC, including but not limited to scholarship risk intervention, non-registered initiative, and faculty issued progress reports/referrals.
7. Assign up to five percent of the Undergraduate Academic Advisor I job responsibilities on assigned college operations. These operations do not necessarily need to be advising related.
8. Support the UAC Tiered Career Ladder by identifying additional duties or responsibilities (ADR) available to UAAs eligible for promotion. These duties may include (but not limited to): specialization in student populations (Honors, OSP, Transfers, Veteran/Military, etc.), conducting assessment/research projects, working with prospective students, serving on college committees, facilitating college events, promoting career readiness, working with college faculty, and other duties aimed at supporting the college. Advisor II, Advisor III, and Advisor IV college ADR job responsibilities will likely accumulate 10-40% (respectively) of the advisor role.
9. Provide a College Supervisor for all UAAs assigned to their majors. UAA supervision is key to the success of the UAA program and requires College Supervisors to provide on-going support and communication with Advisors. See "Supervision" section of the MOC.
10. Support UAA attendance at [University Advisors Network \(UAN\)](#) monthly meetings, professional development opportunities, and other UAC-sponsored events.
11. Coordinate opportunities for faculty and advisors to develop on-going working relationships. (See item 9 under UAA role.)

Memorandum Element Self-Audit, cont.

Memorandum Element #6: Dual Reporting Structure

Because MOUs establish supervisory or managerial roles in both a central advising unit and distributed academic units, the MOU must clarify how these two roles are distinct. If they do not distinguish these roles, institutions risk creating a structure where advisors receive duplicative, overlapping, or even conflicting directives from their supervisor and their manager. In most cases, the unit-level advising supervisor is responsible for daily oversight of and feedback on advisors' work, while the central advising manager provides higher-level career support, assessment, and communication to align advisors' work across units.

Does your MOU explicitly state:

- The role of the academic unit supervisor (typically, oversee advisors' day-to-day work)?
- The qualifications and knowledge expected of the academic unit supervisor?
- The role of the central advising supervisor (typically, oversee standards, training, communication, and program-level assessment)?

Institutional Example

Supervision and Program Management

College Supervisor (EPMS Supervisor/Rater): _____ provides direct supervision and oversees on-the-job guidance, shadowing other college advisors, and college-specific training of their assigned UAA. The College supervisor conducts EPMS reviews in coordination with UAC Assistant/Associate Director and monitors UAA advising practices. All UAA's must have a regular point of contact within the majors they advise to ask questions, shadow, understand curriculum, etc. in order to be successful in their position. A college supervisor is defined by the following: meets 1-1 with UAA a minimum of 3 times per semester, serves as the EPMS supervisor, and provides daily supervision and support to the UAA. The college supervisor approves and monitors UAA annual and sick leave.

UAC UAA Program Manager (EPMS Reviewer): The UAC Director/Associate Director provides general guidance to all UAAs by offering reports on UAA availability, UAA completion of training and certification programs, survey data, assisting with new UAA onboarding, guiding UAA participation in academic intervention, and providing advising assessment reports. In addition, the UAC Director/Associate Director hosts monthly staff meetings with all UAA's and offers regular communication about institution-wide initiatives and updates.

Memorandum Element Self-Audit, cont.

Memorandum Element #7: Funding Model

In most distributed models of advising, funding for advising positions are split between the central advising unit and academic units. While the exact funding split for each institution will depend on its resources and budget model, the MOU should codify that split in writing.

Does your MOU include:	<ul style="list-style-type: none"><input type="checkbox"/> The split of funding for advisor positions between academic units and the central advising unit?<input type="checkbox"/> Any process steps that need to be completed (and their timeline) to standardize advisor pay scales and position funding?
Institutional Example	<p>Funding:</p> <p>The University Advising Center and [college/school] agree to a collaborative 50-50 professional academic advising model where salary and fringe expenses for [college/school] Undergraduate Academic Advisors will be shared equally by both departments (50%-50%). This will be accomplished through the following:</p> <ol style="list-style-type: none">1. Move/convert position numbers 00086176, 00145388, 00001831, 00124429, 00004216 and 00150075 to the University Advising Center (Department Number: 100019) as an Undergraduate Academic Advisor. Position descriptions will be reviewed with the college supervisor to ensure filled positions are categorized appropriately within the UAC Career Ladder (i.e. Advisor I, II, III, IV).1. Beginning [insert date], Advisor 1, Advisor 2, Advisor 3, Advisor 4, Advisor 5, and Advisor 6 will move to the UAC as Undergraduate Academic Advisors.2. Assuming these advisors participate in UAC interventions, trainings, monthly meetings, and other university advising activities, these advisors will be eligible for the UAC Career Ladders, professional development, and other employee enrichment opportunities.2. Beginning [insert date], all current [college/school] Advisor employee funding information will reflect a 50%-50% cost split for salary expenses.3. Any new hires from this point forward will be hired under a 50% 50% cost-split model at the time of their hire.4. As Advisors are promoted through the Career Ladder, the UAC and the [college/school] will jointly share associated costs 50%-50%. All Advisor promotional opportunities, additional duties and responsibilities, and job responsibilities will be determined by the College Supervisor.

Memorandum Element #8: Advising Position Audit

When advising roles, titles, and pay scales are standardized, many advising staff will see their titles and salary change to align with the institutional standard. The MOU template provides space to calculate these changes so that unit leaders have complete transparency on any changes to their expenses.

Does your MOU include:	<ul style="list-style-type: none"><input type="checkbox"/> Space to list current advising positions in the academic unit alongside their new titles and salaries after aligning to the new institutional standard?<input type="checkbox"/> Information on how salary changes will be determined and who is involved in decisions about advisor salary?
Institutional Example	<p>The table below shows an approximate yearly salary cost for undergraduate academic advisors in [college/school]. As advisors promote through the career ladder, these figures will change. Salary increases associated with career ladder promotion are jointly decided on by the college supervisor and UAC Administration.</p> <p><i>See sample chart on the following page.</i></p>

Memorandum Element Self-Audit, cont.

Advisor Name	Current Title and Salary	New Title and Salary

Memorandum Element Self-Audit, cont.

Memorandum Element #9: Conditions of the MOU

The last element that should be included in the MOU template relates to the MOU document itself. The MOU is a contractual agreement and should include provisions for how and when units and central leadership can revisit its terms as priorities and needs change. Establishing a cadence and frequency for review also ensures that leaders (re)familiarize themselves with the MOU's terms regularly, especially in a decade when academic and administrative leaders' average time in seat is decreasing.

Does your MOU include:

- The process for making changes to or terminating the MOU?
- How often the MOU will be revisited?
- How the success of the MOU will be assessed?

Institutional Example

Renewal, Termination and Amendment

1. The agreement may be amended by an exchange of letters between the UAC and the [college/school]. Such amendments once approved by both parties, will become part of the Memorandum of Collaboration, and are subject to approval by the Dean of Undergraduate Studies. Termination of this agreement during the term of the agreement can occur with consent of both parties.
2. The UAC and the college agree to full and complete performance of the terms contained within this Agreement.



EAB Insight

When institutional leaders develop new advising programs or standards, they should identify the goals, purposes, and how success will be measured and establish a regular cadence of evaluation prior to implementing any changes. For more information on program evaluation, see [8 questions to ask when evaluating the impact of student success programs](#).

Appendix: Additional MOU Template Example

[Name of Institution]

Academic unit | Advising office name

Students are advised by professional academic advisors who serve as the primary contact for developmental advising, empowering students to achieve their academic and career goals.

Academic advisors are employed by the Office of Advising and report to the Director of Advising, who serves as their direct supervisor. Advising roles, responsibilities, policies, procedures, and protocols are determined by the Office of Advising in coordination with academic units.

The College advising team and the academic units are partners in student success. Working together, all parties will provide outstanding service to students and help further the mission of the institution.

Partnership Expectations

Availability to Students

Academic advising will be available, at a minimum, from 8:00 a.m. to 5:00 p.m. daily, Monday through Friday. Flexible work arrangements may be developed—and documented through Human Resources—to extend office hours beyond 5:00 p.m. and/or virtually. Advising appointments and/or walk-in hours must be available to students Monday through Friday.

The Director of Advising will work with staff to coordinate appropriate office coverage throughout the day, including staggered lunches and other breaks. At the beginning of each term (fall, spring, summer), the Director will share advisor availability for each program of study with each Academic Dean's Office.

Partnership Expectations

Academic Advisor

1. Provide academic advisement for programs in the [academic unit].
2. Leverage [student success management system] to maintain academic advising notes, proactively engage students, and coordinate student support with other offices.
3. Develop and maintain working relationships with the department chair and/or program directors for assigned academic units.
4. In consultation with department chairs and/or program directors, update program maps and curriculum check-sheets.
5. Serve as a liaison between [academic unit and advising office name], particularly in regard to program information and changes in curriculum.
6. Meet with department chairs and/or program directors at least two (2) times per semester.
7. Participate in training provided by the academic unit on curriculum matters.
8. Participate in department curriculum committee meetings in an advisory capacity.
9. Consult with department chairs on student credit hours overload requests.
10. Notify associate dean if/when conduct reports are submitted.

Issues related to the following areas should be routed appropriately through the coordinator, department chair/program director, and/or associate dean: curriculum, seat availability, course overrides, petitions for academic exception and transfer course equivalency, student appeals, permission for transient status requests, course substitutions.

Appendix: Additional MOU Template Example, cont.

Partnership Expectations

Academic Advising Director

1. Ensure the [advising office name] is operating in cooperation with the [academic unit].
2. Ensure that academic advisors are assigned to all programs of study in the [academic unit].
3. Report retention, progression, persistence, graduation, and other enrollment data to department chairs, program directors, and associate deans, as requested.
4. Provide registration and advisement-related reports, as requested, by [academic unit] administrators.
5. Refer academic matters to department chairs, program directors, and/or associate deans, as needed.
6. Refer student behavior issues to department chairs, program directors, and/or associate dean, as appropriate.
7. Notify [leaders, i.e., associate dean, director of advising, and/or associate provost] of any complaints received regarding academic advisors.
8. Defer to department, program, and/or academic unit on curriculum and course substitution matters, unless in direct opposition to Institutional policy and student success outcomes.

Partnership Expectations

Academic Unit

1. Share with academic advising team information on advising and programming identified as best practices by accrediting bodies.
2. Ensure all teaching faculty report student progress concerns in [student success management system].
3. Assign faculty to provide career guidance and mentoring to students and maintain associated notes in [student success management system].
4. Academic advisors should be consulted on the following student concerns:
 - a) Registration issues, including late add/drops and course swaps (program of study checks and updates required)
 - b) Course needs and availability, particularly courses that impact student progression through degree programs
 - c) Academic renewal requests
 - d) Limited grade forgiveness requests
5. Share any complaints about academic advisors and/or [advising office name] hours with the academic advising director and the associate provost.
6. Work with academic advising team on distribution of and access to shared equipment (e.g., copier), supplies, and materials.

This agreement will be reviewed and updated on an annual basis, unless otherwise requested by the [academic unit], [advising office name], or the Office of the Provost.

NAME [Senior Advising Executive]

NAME [Senior Academic Unit Executive]

This sample was built from an actual MOU submitted to EAB by Georgia Southern University and has been adapted to include additional important details.



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