

HIGH-IMPACT ADVISING:
A GUIDE FOR
ACADEMIC ADVISORS

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INTRODUCTION

About the Author

I've been working in higher education forever. Through a series of seemingly unrelated and insignificant events, I entered the field rather seamlessly and fortuitously.

In my teens, I had dreams of becoming a pop singer. I was good. I thought I could be a star; after all, I wanted it badly enough. Then I came down with a life-threatening illness that took me out of high school during my freshman year. I was very ill, and when I returned to school in my sophomore year, my teachers and guidance counselor were just so happy that I was alive, they didn't push me or stress the importance of career exploration and academic planning. The future was uncertain, so they let me keep my dreams. While I in no way blame my guidance counselor for the lack of intervention, I can trace many of my choices to her decision to support me in ways that were much more important than talking about colleges, majors, and careers. She cared for me. She arranged for all of my teachers to provide instruction to me in my home. Upon my return, she talked to me about transitioning back into school after being out for six months. She talked to me about my health, and encouraged me to focus on getting stronger. She met my needs in ways that far transcended the usual role of a guidance counselor. In retrospect, I think she was the impetus for my ultimate career path.

As graduation neared, I thought I should develop a "Plan B." I knew I liked two things: music and people. In April of my senior year, I thought I had better go to college to

do something. I enrolled in the local community college and studied humanities. In the beginning, I still maintained my dream of a music career, but three significant encounters with college personnel changed my path.

After waiting eagerly (and exhaustingly) in line to see a financial aid counselor on a hot summer's day, I finally got to the front and was given my financial aid award letter. I asked the financial aid counselor what "CWS" stood for. He explained that it meant "college work study;" a type of student aid. I asked for more information, and he abruptly asked if I knew the alphabet. "Huh?" was my articulate response. He repeated the question, and I affirmed that I did. He promptly offered me a job in the Office of Financial Aid. This was my illustrious entrée into the field of higher education. They quickly realized that I could offer more than just help with filing (the task I was initially assigned due to my wonderful alphabetizing skills), and moved me up to work the front desk, answer student questions, and field irate student complaints. That experience was a surefire way to build professional character. It also instilled in me a passion for working with college students.

The second person to positively impact my college career was my faculty advisor. He was also my Introduction to Psychology professor. He was laid back and approachable. I perceived his responsibility to me as my advisor to be to sign off on my course list each semester. I thought it was kind of a waste of time to have to go to him for that, as I could read the catalog as well as he. Of course, our conversations never really focused on the course list. I don't remember what we talked about specifically, but it left a lasting impression on me. His compassion, approachability, and concern stayed with me throughout the years. He was my first mentor; to whom I would turn

numerous times throughout the years until he passed away at too young an age.

The final person who, with just a few words, planted a seed that lasted a lifetime, was one of my other psychology professors. My class was divided into groups and each group was instructed to create a presentation on altruism. Again, the details are sketchy, but in the middle of my group's presentation, my professor stopped me and asked what I was planning to do for a career. I told him that I had no idea. He said, with great conviction: "You should be a teacher. You're a natural." This one statement helped me reframe my thinking and self-perception, and kick started my exploration into careers in education.

I went on to earn a bachelor's degree in Psychology, a master's degree in Counseling, and, twenty years later, I returned to school to pursue my doctoral degree in Higher Education Leadership.

Why am I telling you my life story? Because I think it's important to look at the themes. The people who made the most significant impact on my life and professional direction were those who I describe as caring, concerned, and supportive. How will your students think of you in the years to come? What one nugget of advice, direction, or encouragement will positively impact them as they embark on their academic and professional journey? Perhaps they will not remember your name, or the details of the conversations you had, or the forms you needed to sign and the policies you had to uphold. But, if they can remember you and the support you provided, then you have made a difference. It is my hope that you can all enjoy a long, rewarding career in the field of higher education and that your passion for advising and student services remains strong as you work to positively impact your students.

Background and Philosophy on Advising

Throughout the years, I've had the pleasure to work in diverse settings, ranging from proprietary career schools, to community colleges, to state and private universities. I've worked as a personal counselor, career counselor, academic advisor, advising administrator, and faculty member, and have valued the opportunity to work with students ranging from incoming freshmen to doctoral students.

It is my hope that, as you read through this book, you are able to glean some of my major personal philosophies and choose those you wish to adopt and develop in your own career. A partial list of things I believe, in no particular order, can be found below:

1. If something is wrong, make it right.
2. We are educators. Let's teach our students.
3. Add value to students and the institution whenever possible.
4. Listen. Really listen.
5. Put your students first, even on your bad days.
6. Remember why you're here.
7. Take care to do the job right.
8. Helping students does not always mean giving them what they ask for.
9. It's not about us. It's about them.
10. Challenge the status quo.
11. Make a difference.

For New Advisors

Welcome to the field of advising! The wonderful thing about the field of advising is that it is comprised of a very diverse population of individuals who hail from differing backgrounds, bring varied skill sets to the table, and approach the job in a variety of ways. This helps us bring strength to the profession.

I have been training advisors for many years, and as you'll see throughout the book, I have definite ways of approaching advising students. Once, I had a colleague tell me, "We don't all have to do it the way you do, you know." I always welcome reality checks like that. While I wish the world would always turn as I want it to, that is not reality. You may not approach the job exactly as I do, and that's okay. What I encourage you to do is review the concepts within the book, internalize the practices that are reasonable and meaningful to you, and embrace the philosophies that resonate with you. As you progress in your career, I encourage you to develop your own best practices and philosophies, and share them with others.

I have developed these practices as a direct result of advising students for many years. As you gain experience and progress through your career, you will develop your own repository of knowledge and refine your practices as a result. I encourage you to strive to improve in your role each day. Don't settle for "good enough." Keep learning and keep growing. Align yourself with colleagues who share your enthusiasm and remain positive. Identify people who can teach you something and ask for their help. Avoid negativity and negative people, even through the tough times. No matter how you approach the job, at the end of the day, ask yourself this important question: Am I

confident that I best served my students and the institution today?

For Advising Administrators

Training advisors is not an easy job. We never seem to have enough time and resources to devote to providing comprehensive, ongoing training to our advising team. As administrators, we are faced with managing multiple priorities related to supervising personnel, executing programs, addressing escalated student issues, and attending to the myriad of administrative functions that come with the job. Admittedly, over the years I struggled to implement the ideal training program that I had envisioned. I realized that sometimes there are just not enough hours in a day. However, I encourage you to chip away at the task. Perhaps develop one new training initiative a year. Share the responsibility with your staff, and encourage them to take control of their own professional development.

Within this book you will find useful tools, exercises, and assessments which can be used in individual and group training sessions for new advisors, as well as ongoing training and reinforcement of practices. My intention is to provide you and your advisors practical, easy, and clear strategies for delivering effective advising to students.

Navigating This Book

Chapter 1: Academic Advising: Beyond the Catalog

Academic advising goes well beyond citing policies and procedures. In this chapter, we'll explore the primary functions of academic advisors and the pertinent skill sets that should be developed and employed in order to effectively execute our duties and support our students. Here, you'll find scenarios, scripts, opportunities for self-reflection and assessment, and ideas for implementing advising strategies.

Chapter 2: Understanding and Meeting Student Needs

As we work with diverse student populations, it is important to understand and meet each student's needs in a comprehensive and holistic manner. In this chapter, we'll look at traditional, adult, graduate, and distance/online students and what makes serving each population unique. We'll also examine strategies for working with reluctant or "difficult" students. Examples of effective communication and practice scenarios are provided in order to assist you in assessing your own skills and developing new strengths.

Chapter 3: Academic Advising Delivery Methods

Academic advising is no longer limited to meeting with students individually in your office. In order to meet the

growing demands of our diverse student body, as well as manage increasing student advisee loads, advisors find themselves engaging students in multiple ways. In this chapter, we'll discuss strategies for maximizing the effectiveness of working with students in face-to-face appointments, walk-in advising sessions, and distance/remote settings. This chapter includes useful scripts, scenarios, and checklists, and provides further opportunity for self-reflection.

Chapter 4: Investigative Advising

In this chapter, we'll examine the importance of using research and problem-solving skills to support students. Through the use of practice scenarios, we examine common student inquiries and barriers, and how we can thoroughly support them through the use of critical thinking. We will also discuss how to strategically use the student information system (ERP) to research student records and identify systemic roadblocks.

Chapter 5: Promoting Student Success

Engaging students in academic planning is one of the critical functions of academic advisors. In this chapter, we'll examine ways to assist students in thoughtful, realistic planning and expand the process beyond simply picking courses. Additionally, we'll discuss the importance of promoting resilience in our students, and explore strategies for building resilience and promoting persistence in them.

Chapter 6: Risk Management

Much of our job as advisors involves administrative work, record-keeping, and documentation. Our notes and communications, both with students and colleagues, are

official documents which are critical to successfully recording service to students. In this chapter, we'll discuss strategies for maximizing the effectiveness of these notes, as well as how to minimize risk to the institution as a result of poor or inflammatory documentation. We'll also discuss pertinent practices related to the Family Educational Rights and Privacy Act (FERPA) and the Americans with Disabilities Act (ADA).

Chapter 7: Beyond Day-to-Day Work— Grassroots Leadership in Academic Advising

In this chapter, we'll examine strategies advisors can employ to positively impact their institution and advising profession. We'll also examine ways to reduce day-to-day frustrations by taking control and making valued contributions to the department and institution. In doing so, you'll be able to derive more satisfaction in your position as advisor, as well as build your professional portfolio for future growth and advancement.

CHAPTER 1

ACADEMIC ADVISING: BEYOND THE CATALOG

Primary Functions of Academic Advisors and Related Skill Sets

The role of the academic advisor is complex, requiring us to effectively communicate with students, understand and interpret policies and procedures, follow institutional protocols, maintain student records, utilize technology, and engage in problem-solving. Our job functions can be categorized into three major areas: student service and support, operational, and problem-solving. In order to effectively execute these activities, advisors should develop and draw on five major skill sets: informational, instructional, investigational, interpersonal, and integrative.

Student Service and Support Function

Interpersonal Skills

I have had the privilege of interviewing numerous advisor candidates over the years, some who are aspiring to this new role, others who are experienced in the field. Most often, when asked what is the most important skill an advisor can bring to the position, prospective advisor

candidates respond, “working with people.” While I’m sure they think this is the “best” answer, it is really a simplification of the complex nature of the application of interpersonal skills in the advising relationship.

Over the course of my career, I’ve encountered many advisors who are “nice,” but who lack in the areas of knowledge and follow-through. I’ve known others who are perceived as rather distant, but are adept at citing policies and procedures. Which type would a student prefer to work with? That is hard to answer, as every student differs in their expectations and styles. However, if you can integrate effective interpersonal skills with a solid knowledge base, you will maximize your effectiveness as an advisor.

Our interpersonal skills must extend beyond being nice or caring about students. They must go beyond being funny, or even approachable. Our interpersonal skills should help us promote our agenda; that is, supporting students in a strategic and informed manner while making them feel that they are central to our mission. They need to feel that they are welcomed and valued, and we need to reinforce that message each and every time we connect with them.

Some strategies for effectively infusing interpersonal skills into the advising session include:

Reinforcing the message:

Students should be our primary focus. Period. During our day, we are inundated with administrative tasks, deadlines, events, and meetings that demand our time. As we are busily trying to review records for certification purposes or sign-off on degree conferrals or complete reports, our phone continues to ring and students continue to file into the office. It is easy to become frustrated with these

unanticipated contacts which disrupt our plans. I recall once, when I was first starting out in the field of academic advising, a colleague exclaimed to me, “I would be so much more effective without all these interruptions!” I remember how dismayed I was to learn that her perception was the reverse of mine. She was perceiving the students as interruptions to her administrative tasks. I perceived (and still do) the administrative tasks as an interruption to my key focus of helping students.

Now, obviously no one wants to be interrupted in the middle of a task. If you’re on a roll, you may want to process all of your major- change forms or degree conferrals and, indeed, a ringing phone will interrupt that flow. However, picking up the phone will mean so much to the student on the other end, and will serve your primary purpose of helping students.

Despite your actual feelings (for, let’s face it, you may indeed be annoyed or frustrated), make sure the student feels welcomed and valued each time you connect. When answering the phone or going out to greet the student, make sure to have a smile on your face. Often times, students who call or drop in will begin with “I’m sorry to bother you...” or “I know I’m being a pain, but...” Make sure to reinforce the message that they are not being a bother or a pain. I usually say something to the effect of “You’re never a pain. This is what I’m here for.” or “No, you’re not bothering me at all. I love hearing from you!” Even infusing humor with a statement such as, “Bother? You just saved me from working on a boring report.” is an effective way to help students feel cared for and connected to you.

Effectively listening:

While all advisors can reach consensus on the importance of effective listening, our definition and characterization of what effective listening looks like may differ. Effective listening means *really* listening. Try to silence the voice in you that says, “I bet she’s going to say...” or “I need to remember to tell him...” Just listen. If you have some thoughts that come to you during an advising session, jot them on a pad of paper and remain focused on what the student is saying in the here and now. This is not easy to do, and will require practice. Our reality is that we have a great deal of knowledge and expertise that is bubbling to the surface at any given time, and we are eager to share that knowledge with our students. Take time to validate students’ concerns and make sure you are understanding their frame of reference.

Effective “listening” is just as important in email advising as it is in person or via phone. In this case, listening means accurately discerning what the student’s primary concerns are, and inferring what impact the issue(s) is having on the student.

In every case, it’s important to verify that your understanding of the student’s concerns is accurate. By integrating statements that demonstrate your perception of the student’s concerns and/or feelings into your discussion (or response), you will enable students to feel heard. Statements such as, “It sounds like you’re overwhelmed with the amount of work you have this semester,” or “To make sure I’m understanding, your major concern is regarding the professor’s treatment of you in his class. Is that correct?” will show students that you are dedicated to understanding and responding to their needs.

Demonstrating care every time:

Ask how the student is doing. Ask about new events, successes, and challenges in his or her life. Ask if they are having any adjustment issues.

Example:

- It is good to see/hear from you!
- What has been happening since we last spoke?
- How is the new job/role in a club/sport/roommate?

Inquiring and validating:

Instead of assuming a student's experience and perceptions based on developmental theory or on your own years of experience, ask the student. Use open-ended questions to better understand the student's unique experience and perceptions.

Example:

- Tell me about how your algebra class was.
- I see that your GPA dipped a bit last semester. What do you think led to that?
- How are you feeling about your decision to change your major to accounting?

Providing support and encouragement:

Regardless of age, generation, or academic level, students value receiving support and encouragement from university personnel. Students may doubt themselves and experience fear and anxiety about the academic process. As

an advisor, you can help reduce those fears in order to help students succeed.

Example:

- Congratulations on the completion of your first semester! What are some things you learned that you can use to be even more successful next term?
- It looks like it was a good decision to reduce your course load. Your grades seemed to have improved as a result.
- I know stats can be an intimidating class. Here's some information about tutoring and study groups should you want some support.

Instructional Skills

In order to facilitate growth and development, as well as to promote self-reliance, advisors must engage in teaching students the research, decision-making, and problem-solving skills they will need to be successful in college.

Often, students come to us seeking answers to specific questions or access to resources. When we simply provide them those answers and resources, we risk students developing a dependency on us to meet their needs. After all, it is easier to just ask an advisor for answers as opposed to taking responsibility for knowing something.

An example comes to mind of a student who was enrolled in my freshman seminar course. At eighteen, he had never developed technological skills. He readily stated that he did not know how to use email and text messaging, nor how to upload and download electronic files. I found that to be remarkable, given my assumption that most eighteen-year-

olds' technological skills would far surpass those of their instructors. He informed me that he would approach his professors, explain his lack of skills, and ask them to make exceptions to their assignment requirements; for instance, he would ask his professors allow him to turn in handwritten essays instead of uploading them to the preferred online platform. He received approval from his other professors, but not from me. As an instructor in a freshman seminar course, it is my job to provide the students the necessary skills to be successful in their academic program. By accommodating his request, I would be missing a "teachable moment," and he would miss out on an essential learning opportunity. Instead, as he came up to me after each class and asked, "Where can I find this week's assignment?" I would ask him to recall what he knew about where assignments were kept in our classes' online database, and ask him to walk through the process of accessing assignment information. This informal assessment helped me determine the areas in which he needed improvement. Then, I'd ask him to follow the links that I'd discuss with him, making sure to provide explanation of why things were located where they were in order to provide him a framework of understanding. Each time he'd ask, I'd reinforce the need for him to internalize the information and process, so that he could be successful, not only in my class, but in his other classes and in future semesters.

This same strategy can be used in individual advising sessions and written communications to students. Some questions to assess a student's level of understanding are as follows:

- Have you had an opportunity to review our curriculum descriptions?

- Are you familiar with the registrar's office? Have you heard about Satisfactory Academic Progress (SAP)?
- Do you know where to find our academic calendar?

By asking these questions, not only are you assessing what a student does or does not know, you are reinforcing the idea that these resources are available for students to use in addition to contacting their academic advisor.

Here are some examples of discussions you can infuse into your advising sessions to promote learning:

SCENARIO 1

Student: My address is wrong in the computer. Can you change it for me?

Advisor: The registrar's office is responsible for anything related to your student record and registration. They are located in the Student Center. Have you ever been there before? They are on the second floor. You can find the forms you need on their website. Let's take a look. I'll show you how to navigate to the website, and I recommend you bookmark it on your own computer.

SCENARIO 2

Student: I am thinking about withdrawing from a class but don't know what to do.

Advisor: “There are couple of important things to consider before withdrawing. Before we begin that discussion, tell me what's happening in that class.” *Depending on the student's response, you may wish to discuss strategies for approaching the professor about catching up, requesting an incomplete, or determining success strategies for the class. If the withdrawal is imminent, the discussion might continue as follows:* “Let's look at the academic calendar and also review the withdrawal policy. There are some important implications of withdrawing related to our course attempts policy as well as several financial aid policies. Let's also take a look at some resources that can help you in future semesters, such as our tutoring services and success skills workshops.”

By using instructional skills, you add value to your role in student development and success, and support the mission of the institution in educating students.

Operational Function

Informational Skills

The informational aspect of advising is usually the first area to which a new advisor is exposed and the skill that is most frequently prioritized by both advisors and students. Informational competency encompasses citing policies and procedures, curriculum requirements, deadlines, and protocols. Often, it is this area that is represented when students ask questions such as “Is it too late to drop a class?” or “How do I change my major?”

Providing accurate information to students is not only the most expected, most requested function of advisors, it is also the most essential. We serve as a repository for a wide array of information encompassing all aspects of the university experience, and are expected to disseminate this information upon demand.

Unfortunately, you will find a great deal of variance regarding the knowledge proficiency among advisors—even amid those within the same department. Factors including how they were trained, who provided the training, and the resources they use all contribute to their proficiency, or lack thereof. Access to information regarding changes in policies and procedures is another variable that contributes to advisor proficiency. I have encountered advisors who are frustrated that they don't have the opportunity to be privy to certain information due to their office location or relationships they may or may not have with others in the department. This can occur with a decentralized advising model, a multi-campus model, or even with a large staff within the same work-space.

I once worked in a setting where we were situated in a four-person cubicle configuration. There were four sets of these quads. The director happened to be located in my quad. When she'd return from a meeting, she'd excitedly tell those of us seated in proximity about a new policy or procedure that was discussed. There were times that the other advisors were not informed, or obtained the information much later. Advising administrators should be cognizant about how these informal communications can negatively impact departmental operations.

Utilize Resources

One of the most common pitfalls in advising occurs when advisors fail to rely on their resources, and instead rely on their memory and/ or colleagues for information. It is easier to just turn to a colleague (or call or instant message them), and ask, “What’s our policy on…” than it is to flip to a page in a catalog or find it on our website. Often, the result is like a bad game of “telephone,” with the original, stated policies getting misinterpreted by the end user. I encourage you to refer to your resources regularly and consistently in order to provide accurate information to students.

Advisors should develop a comprehensive collection of resources for reference, as well as to provide to students. Upon beginning a new position in advising, you should obtain the following list of resources (usually in the form of bookmarked, or favorited webpages). Experienced advisors who accept a new position should consult with colleagues on their most frequently accessed resources, as each department and institution may vary slightly.

Common resources for advisors include:

- Academic Catalog
- Student Handbook
- Schedule of Classes
- Degree Audit
- Academic Programs
- Academic Calendar

- Critical Policies
- Financial Aid
- Registrar
- Bursar
- Transfer Institution Websites (for 2 year colleges)

Organizational Skills

Advisors must be able to quickly access and provide information to students, faculty, and administrators. It is essential to develop systems that are efficient and make sense to you. It has taken me years as an advisor to develop systems that work well for me. They are simple, and perhaps very obvious, but I have found that other advisors still struggle with organization.

Categorize your emails:

Microsoft Outlook® users can benefit from using the categorize feature to organize their correspondence. Once emails are categorized, they can be sorted to easily locate or take action on a particular email. The most frequently used category that I personally have come to rely on is “student emails.” First thing every morning, I mark incoming emails from students, and then review my other new emails to determine how to prioritize my responses. Next, I sort my inbox by “student emails,” and am able to efficiently go through all of the inquiries without fear of any email being overlooked. This is a great strategy for advisors who have a large influx of emails each day.

Some categories I have developed over the years are as follows:

Inbox:

- Student emails: to identify email inquiries from students
- Waiting for information/response: to identify emails that you have sent on to others for information, approval, or action, but that will require a follow-up response to students
- Project “X”: to identify emails regarding a specific project or committee
- Prospective student inquiry: to identify emails from individuals that do not have a student ID and therefore cannot be entered into the advising database

Sent Mail:

- Entered in comments: to identify which sent emails still need to be copied into the student record in the student information system database
- Mass email: to identify and locate emails that I send to large groups of students

Triage your calls and emails:

Some advisors feel that it is important to provide “first come, first served” service to students, often setting away messages to include phrases such as: “I will return your call/email in the order in which it was received.” If this practice is upheld during peak periods, advisors risk delaying

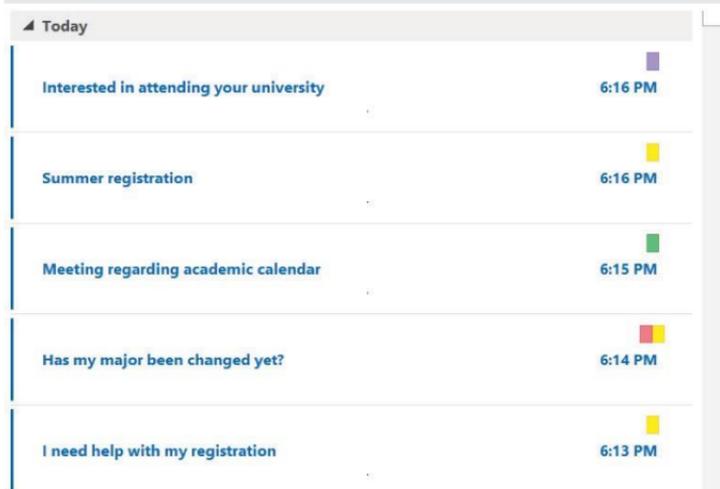
SAMPLE INBOX ORGANIZATION

Yellow = Student email

Green = Administrative projects

Red = Waiting for information/response

Purple = Prospective student



response to a time-sensitive issue as they reply to inquiries that could be addressed later. That's not to suggest advisors should put students off—students should feel that you care about them and want to help. I suggest using the triage method to better communicate that desire to help.

Tips for triaging with care:

- “It would be helpful if we met to discuss your questions and engage in academic planning. How does your schedule look the week of ...? Since the semester will be under way, we'll have plenty of

time to discuss your plans and address any questions you may have. In the meantime, here are a few resources for your use.”

- “Hi. This is a busy time of the year, and I hate for you to wait. Let’s make an appointment so you don’t have to play phone tag with me (*or wait in the lobby, etc.*).”

By triaging your student inquiries, you can also identify relatively simple issues that can be addressed quickly. However, I caution advisors not to get caught in the trap of answering a singular question without comprehensively reviewing the student’s record.

Make electronic notes:

I admit it; I am a long-time fan of sticky notes. Years ago, I always had a bulletin board with notes tacked all over it. The notes could vary from contact names and numbers to course information or policy changes. Then came the invention of sticky notes, which I could stick wherever I wanted...usually on my phone, computer monitor, or wall. (I admit, as I am writing, I have two still prominently displayed on the bottom of my monitor). I have since discovered that Microsoft Office® has a useful notes feature which can readily replicate the paper note system, and is much easier to retrieve. When I receive an email about a new policy or staff member, I simply copy/paste the pertinent information into a new note. Then, when I need to recall that information, I enter the notes feature and search by a particular word or phrase. The notes are readily retrievable. Notes that are regarding policy or curriculum changes can be dated to easily remember when the change occurred. My colleagues think I’m a genius for my recall of information, when, in fact, I am simply referring to these easily accessed notes.

Document history:

If you've ever worked in a setting wherein much of the information is stored in the memories of one or two key individuals, you may know the panic related to the eventual departure of those individuals. After all, people retire, take new jobs, and/or go on leave. When those individuals are not available to answer questions relating to historical decisions on policies, procedures, or curricular changes, the impact can be significant. If not properly documented, this information can be reduced to "advising folklore." I recently encountered a department that had approximately four advisors who had been with the institution for five to twenty years; each of whom were expert in a different academic program. The institution offered an early retirement incentive, and all four advisors took advantage. With their departure, the program history literally walked out the door.

If you are your department's historian, take the time to write down and save the history in an easily accessible location. If someone proudly boasts, "I've got it all up here!" as they gesture toward their head, take that declaration as a warning, not an achievement. These people are highly valuable if they're available, but a liability once they leave. While you may believe it is the role of the advising administrator to ensure written documentation is available, you can be proactive in obtaining and organizing the information you need by documenting changes on an ongoing basis.

Follow through and follow-up:

Advisors spend a lot of time fielding complaints on tasks that were never completed or processed. You may hear statements such as, "I already submitted my request to change my major. Why hasn't it been done?" or "I paid my

bill, why do I still have a hold on my account?” throughout the day. Effective advisors are able to develop systems and strategies for completing paperwork and following up on administrative tasks.

Some strategies for effectively infusing operational skills into the advising role include:

- 1. Completing the necessary processes right away.** While meeting with a student, you may notice that his or her major has not been changed. Send an email, complete a form, or make a call during or following the session to facilitate that change.
- 2. Learning your systems and identifying best practices.** If you don't know how to see if a student's major has been changed or what kind of hold he or she has, learn more about using the student database. If you're finding that filling out forms—then signing, scanning, and forwarding them—is too cumbersome, ask if there is an alternative method to initiate change.
- 3. Developing a “tickler” system for follow-up.** Strategies may include flagging emails, leaving them unread until resolved, or categorizing them as “waiting for response.”
- 4. Identifying a system that works best for you.** To-do lists, scratch pads, color-coded folders, online reminders, and all-day events. While there are many tools and methods to stay organized, each person must find what works best for his or herself.

Reflection Worksheet – Developing Meaningful Systems

The majority of my emails are from:

- Students
- Other advisors
- Supervisor(s)
- Colleagues from other departments
- General mass mailings from throughout the institution (events, announcements, etc.)
- Other: _____

The emails I struggle to keep up with are:

I am most likely to overlook an email that:

To-do lists: work for me do not work for me

I prefer my to-do lists:

- Electronically: Notes within Outlook®
- Electronically: On calendar in Outlook®
- Paper: Post-It® notes
- Paper: To-do list
- Paper: Notebook
- Other: _____

I do not use to-do lists, but have developed the following system to keep organized:

- Electronically – notes within Outlook®
- Electronically – reminders in Outlook®
- Electronically - on calendar in Outlook®
- Paper – Post-It® notes
- Other _____

Problem Solving Function

Investigational Skills

One of the most important skills that an effective advisor can apply is that of analytical thinking. If advisors simply provide links to resources or hand out policies, they are hardly more valuable than the resources themselves. You can maximize your impact on the student experience by anticipating their needs, understanding the university system, and problem-solving on behalf of the student.

Some strategies for effectively infusing analytical skills into the advising process include:

- 1. Avoid “blanket” overrides:** When students encounter an obstacle such as not being able to register for a class, advisors who have the authority to override the barrier may do so without research—a situation that is far from ideal. For example, a student may get a prerequisite error message and the advisor knows that the student took the prerequisite; therefore, the advisor enters an override to allow registration. An analytical advisor will want to know why the student received the error message if the student did, in fact, complete the prerequisite course. By researching the situation, the advisor might find that the student’s program is incorrect, or that the course was built with an incorrect prerequisite or restriction which may block other students from registering.
- 2. Investigate student claims:** A student may insist that she has already taken a course that you’ve indicated she needs. Rather than simply insisting that the student has not taken the course, ask questions and engage in further research. Perhaps

the student had registered for the course and withdrawn in a previous semester. Perhaps the course was cross-listed but is not appearing on the degree audit. The student may have participated in one section but have been registered for another section (it happens!). By engaging in due diligence, you will be better equipped to provide accurate, comprehensive information to the student.

- 3. Identify problems within the system** and work to have them fixed: As you work with students, you are apt to find “glitches” in the system. Rather than simply brush them off and fix individual student problems, understand that there are no glitches. If a student cannot register because the credit limits have been inaccurately set, in addition to raising the limit for the student, the advisor should bring the issue forward to administration. Help to identify causes and implications of credit restrictions on overall student registration patterns.

By building relationships with students through developing strong interpersonal skills, reliably providing information and processing necessary administrative duties, and engaging in strategic problem-solving, you can maximize your effectiveness both in meeting students’ needs and in meeting institutional objectives for advising.

Combining the Major Functions

Integrative Skills

In reality, advisors do not compartmentalize the functions that are inherent in their role. Throughout our day, we jump from student to student and task to task without much thought as to which function we are performing. However, as we do this, we risk treating each student issue

as a “one-off,” that is, addressing the student’s immediate needs and then moving on to the next task at hand.

Advisors who utilize integrative skills approach advising in a holistic and comprehensive manner by looking at the big picture on behalf of the student. Integration includes combining all of the major skill areas by demonstrating concern for the student (interpersonal skills), providing information (informational skills), teaching the student how to become self-reliant (instructional skills), and researching and engaging in problem-solving (investigational skills). By integrating these skills, advisors can maximize their effectiveness in supporting students.

Let’s look at how an advisor could implement integrative skills:

Student: I’m really stressed out and I’m thinking of changing my major. What do I need to do?

Advisor: Oh, I’m sorry to hear that you’re stressed out. Let’s see how we can alleviate some of your stress (*Interpersonal*). Let’s talk about a few things. First, I want to check to see what your current major is” (*Investigational*). You’re showing as a psychology major. Is that correct?

Student: Yes. I’m not sure if I should stay in it. I’m having difficulty keeping up, and I’m not even sure what I will do with a degree in psychology once I graduate.

Advisor: Let’s take a look at where you’ve been so far.” *Checks the student’s record to identify history of applications, major changes, drops, withdrawals, or failures (investigational).* “I see that you had originally submitted an application for business but withdrew it. Tell me a

little about your original interest in business and how you came to change to psychology. (*Interpersonal*).

Student: *After discussion, the student is committed to decision to drop her major in psychology.*

Advisor: You can find a list of other majors in the catalog. Let me show you how to locate it (*Instructional*). In order to change your major, you will need to complete a Major Change Form. You can get one on the registrar's website, which is at www.college.edu/registrar (*Informational*). You might also benefit from speaking with someone in Career Services. They can help you with assessing your interests, values, and skills, and help you to match them with appropriate career paths (*Instructional*).

Student: Okay. I'm going to check with Career Services before changing my major, then I'll submit the form.

Advisor: Great. Please come back and see me to let me know how the visit to Career Services went, and what you ultimately decide to do (*Interpersonal*).

In addition to tying the other four skill groups together, integrative advising involves a great deal of forward-thinking and analytical skills on the part of the advisor. Additional components of advising in this scenario would be:

1. Check to see if the student's first application for business was deactivated, as there may be coding on the student's record that could prohibit registration for certain courses.

2. Review the student's current semester class schedule. Determine how her courses will or will not apply to the student's new major, and discuss options pertaining to remaining enrolled or adjusting her schedule.
3. Review the student's future registrations. Determine if the student is enrolled in anything that she will not need in her new major, or if she should enroll in courses to satisfy prerequisites in the new major.
4. Schedule a follow-up meeting to engage in future academic planning or introduce student to new major advisor.

Advisors who are able to regularly apply all five skill sets will maximize their effectiveness as advisors. Beginning advisors are not expected to master all of these skill areas at once, as they take time to develop and refine. A new advisor is typically introduced to the informational aspects of the job, and is required to know curricula, policies, procedures, and protocols. Indeed, this is what most students seek us out to provide. A new advisor is usually operating at what I call "competency level 1." In this level, advisors predominantly use the information they know and the resources they have to assist students. As advisors gain experience, they may add additional skill sets. Most often, instructional skills pair seamlessly with the informational skills, building the advisor's competency level to 2. It takes a bit longer for advisors to learn how to effectively research student records and analyze information. When an advisor is able to do so, competency level 3 is achieved. A more experienced advisor is able to consistently keep the well-being of the student in the forefront of the advising process, and demonstrates an ongoing interest and concern for the student. This would be evidence of

attaining a level 4 competency. Finally, a highly experienced advisor is able to effectively integrate all of these skills while adding value in anticipating student needs and applying analytical skills, resulting in a level 5 competency.

To determine where you fall in your own development as an advisor, refer to the following Competency Level Chart. Keep in mind that you may not always, in every case, apply all of these skills at any one time. However, I encourage advisors to strive to incorporate as many of these skills on a consistent basis as possible. A great way to assess this is to recall a recent advising session or review an email you sent to a student. Identify what skills were used, and what opportunities for improvement and growth you can identify.

HIGH IMPACT ADVISING

Assessment – Competency Level Chart				
Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4	Competency Level 5
Informational	Informational	Informational	Informational	Informational
	Instructional	Instructional	Instructional	Instructional
		Investigational	Investigational	Investigational
			Interpersonal	Interpersonal
				Integrative
Evidence of Competencies				
Provide information to students	Provide information and follow-up instruction	Research student records, provide student information and directions	Answer student questions, provide resources and instruction, troubleshoot record discrepancies, address students' emotions, personal issues, and well-being	Explain facts and policies, provide framework for understanding, modify records and identify obstacles, address student personal issues, anticipate student needs, discuss future actions and outcomes
Reflect on a recent advising session and/or review a recent email to a student. What skills were evident? How were they reflected?				