

**September 30, 2009**

**Vice Provost Christina Maslach  
200 California Hall  
MC 1500**

**Re: Final Report of the Advising Task Force**

**We are pleased to submit the Final Report of the Advising Task Force on behalf of the task force members charged in your letter dated July 17, 2008.**

**We hope that this report will inform campus about the critical role of advising as central to the mission of teaching and learning and help the campus achieve its larger vision and goals for both undergraduate and graduation education.**

**If we can answer any questions regarding this report or the Task Force's findings and recommendations, please do not hesitate to contact us.**

**Sincerely,**

**Susan Hagstrom  
Co-Chair, Advising Task Force  
Manager of Undergraduate Services,  
College of Environmental Design**

**Eva Rivas  
Co-Chair, Advising Task Force  
Director, Transfer, Reentry & Student Parent Center**

**Maria DePalma  
Assistant Director, Office of Undergraduate Advising  
College of Letters & Science**

**Derek Van Rheenen  
Director, Athletic Study Center  
& Adjunct Professor of Education**

**Advising Task Force  
Final Report  
September 2009**

**Director Eva Rivas, Co-Chair,  
Equity and Inclusion**

**Susan Hagstrom, Co-Chair,  
College of Environmental Design**

**Anne Aaboe,  
Letters & Sciences, Biological Sciences**

**Anna del Rosario,  
College of Chemistry**

**Assistant Director Maria DePalma,  
Letters & Sciences, Office of Undergraduate Advising**

**Elizabeth Elliott  
Center for Organizational and Workforce Effectiveness (resource partner)**

**Leah Flanagan,  
Letters & Sciences, Social Sciences**

**Kim Guilfoyle,  
Haas School of Business**

**Eugenia Guruwaya-Foon,  
College of Engineering**

**Melissa Hacker,  
Letters & Sciences, Arts and Humanities**

**Emmanuel Lopez,  
Student Affairs**

**Cristobal Olivares,  
Student Affairs**

**Maira Perez,  
Graduate Division**

**Dexter Stewart,  
Letters & Sciences, Physical Sciences**

**Donna Symon,  
College of Natural Resources**

**Director Derek Van Rheenen,  
Teaching and Learning**

**Special Assistant Anastacia Kaser, Staff to the Task Force  
Office of the Vice Provost for Teaching and Learning**

**Special Assistant Jean Barker, Staff to the Task Force  
Equity and Inclusion**

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## INTRODUCTION

In his 2008 address entitled *Access and Excellence*, Chancellor Robert Birgeneau emphasized themes of *leadership*, *connections* and *inclusion* as central to the institution's mission of teaching, research and public service. The public character of Berkeley, in expanding access and opportunities for exceptional students from all socio-economic backgrounds, has meant that advising this diverse student body is of critical importance to the campus. As articulated by the National Academic Advising Association (NACADA), "academic advising is integral to fulfilling the teaching and learning mission of higher education. Through academic advising, students learn to become members of their higher education community, to think critically about their roles and responsibilities as students, and to prepare to be educated citizens of a democratic society and a global community."

In order to achieve the goal of access and excellence in a climate of scarce resources, strong connections among advisors, and visionary leadership for advising, become vitally important in enhancing the educational experience of all Berkeley students. However, the complex structure of our large public institution poses some challenges in achieving this goal. The campus advising model involves many people, including faculty, college and major advisors, as well as staff working with specific designated populations of undergraduate and graduate students. Currently, there is limited coordination and collaboration among these advisors on campus, leading at times to a duplication of effort, mixed messaging, and/or a waste of valuable resources.

## BACKGROUND AND CONTEXT

To address the challenge of providing high quality advising to Berkeley students, EVCP George Breslauer asked the Council of Undergraduate Deans (CUD) and Vice Provost for Teaching and Learning Christina Maslach in January 2007 to:

- 1) articulate campus-wide goals, principles, and/or objectives for advising, and
- 2) identify specific practices and policies in order to meet those goals, principles, and/or objectives.

Acting in her dual roles as Vice Provost for Undergraduate Education and Interim Dean of the Undergraduate Division of the College of Letters and Science, Christina Maslach forwarded this information to the joint College of Letters and Science Office of Undergraduate Advising and Division of Undergraduate Education (LSDUE) administrative management team for discussion and consideration. As a result, in early fall 2007, Derek Van Rheen and Susan Hagstrom, members of this joint LSDUE management team, submitted a proposal for an advising communication plan that would:

- Create a more seamless and positive undergraduate experience for students;
- Break down silos of privileged information across student service units: increase accuracy, consistency and appropriateness of information and referrals given to students;

- Provide a common vehicle for posting "official" student service staff announcements;
- Learn from one another: increase opportunities for general discussion, professional dialogue, and community-building among student service staff;
- Fully acknowledge the professional expertise of academic advisors/student affairs officers on campus;
- Include the Career Compass job mapping work in our efforts to ensure that we are in alignment with larger campus mission and goals.

Charged with furthering the development of an action plan to achieve these goals, the subcommittee was expanded to include Eva Rivas and Maria DePalma. This group of four was subsequently asked to attend the NACADA Administrators Institute in February 2008 to continue progress on this institutional priority. During the Institute, the four managers focused on creating an institutional action plan **“to strengthen communication among advisors in order to create a more seamless and positive advising experience for all students at UC Berkeley.”** This Berkeley plan was then reviewed and commented upon by colleagues from comparable institutions and senior NACADA faculty facilitating the Administrators Institute. Further discussion with campus colleagues took place during the UC Berkeley Advising Conference held in the spring of 2008.

The objectives of this Berkeley plan fell into three broad categories:

- Strengthening mechanisms for the exchange of information.
- Networking and building community across campus boundaries.
- Supporting opportunities for professional development in advising.

The full report from the NACADA Administrators Institute is attached as Appendix A.

## THE ADVISING TASK FORCE

In the summer of 2008, on the recommendation of the four managers, Vice Provost of Teaching and Learning Christina Maslach created the UC Berkeley Advising Task Force (ATF) to address the three goals noted above. A letter was sent to Deans of the schools and colleges, in addition to Vice Provosts and Chancellors with oversight of advising functions on campus, requesting nominations for the ATF. The invitation letter to serve on the ATF, dated July 17, 2008, is included in this report as Appendix B. Based upon this invitation, ATF members were appointed from across campus. The ATF was composed of executive sponsor Christina Maslach, co-chairs Eva Rivas and Susan Hagstrom, resource partner and Director of the Center for Organizational and Workforce Effectiveness (COorWE) Elizabeth Elliott, and fourteen additional members, representing the graduate division, seven colleges, and multiple majors. Additionally, the divisions of Student Affairs, Equity and Inclusion, and Teaching and Learning, all with oversight of advising on campus, were represented. The full roster of ATF members is included as

Appendix C. The ATF met bi-weekly between August 2008 and June 2009, with subcommittees meeting more frequently in smaller groups.

## **ACTIVITIES UNDERTAKEN**

Activities undertaken by the ATF included the formation of three subcommittees, a survey of directors of advising staff on campus, the articulation of core competencies for advisors, and a proposed professional development curriculum for advisors, connected to U.C. Berkeley's recent job mapping of advisors in the institution's Career Compass. More specifically, the ATF did the following:

- created an official advising Cal Messages listserv, administered through the Office of Teaching and Learning;
- identified organizational needs/conditions that relate to supporting successful advising on campus, such as ongoing feedback from advising staff, decision-making, resources, implementation, and institutional approval;
- identified the need for several advising coordination functions on campus, including institutional structures and practices, communication, assessment and reward, advising tools, training and learning, and advocacy and compliance;
- created an inventory of existing advising units across campus, including schools and colleges, the Graduate Division, divisions such as Student Affairs, Equity and Inclusion, Teaching and Learning, and Administration (for UHS counseling services), as well as numerous academic support units with advising functions;
- researched models of executive advising coordination and "advising boards" at sister and peer institutions;
- conducted an electronic survey of current advising directors and managers on campus about the desire to create opportunities for increased communication, the sharing of best practices and the coordination of campus advising services;
- consulted with the Director of the Office of Student Research, Gregg Thomson, in review of UCUES data relating to student satisfaction of advising on campus;
- reviewed the notes and evaluations from last spring's UC Berkeley Advising Conference;
- discussed the implementation of a regular advising conference for enhancement of communication and networking opportunities for advisors, as well as a forum for professional development;

- began development of campus-wide advising curriculum and a professional development strategy;
  - ✓ utilized Career Compass mapping structure to identify possible professional development pathways;
  - ✓ identified advisor competencies and development program learning outcomes;
  - ✓ drafted a professional/career development program and a plan for implementation.

## **KEY FINDINGS**

### **Finding 1: The ATF found that there is a decentralized model of advising on campus.**

Many schools and colleges have professional staff advisors; some have faculty advisors. Several have a combination of professional advising staff and faculty advisors. Some schools and colleges advise only undergraduate students, while others primarily advise graduate students. Several schools and colleges advise both undergraduate and graduate students. In addition to these academic departments, staff advisors in student support units serve various populations of students. Students seek advice from professional staff in the residential halls, Sproul Hall, Cesar Chavez Student Center, based upon ease of location, level of comfort, and need for unique support and services. Some students must see multiple advisors to receive the information they require, and at times, receive contradictory information from these multiple advisors. If not contradictory, this model of advising may at least lead to a duplication of effort and a waste of valuable resources.

### **Finding 2: The ATF found that there is not a coherent, consistent mission or philosophy of advising students on campus.**

As a result of a decentralized model of advising on the Berkeley campus, there is not a consistent, articulated mission for advising students. Each school and college, and the majors within these colleges, practice their own model of advising students. Advising units within the divisions of Equity and Inclusion, Student Affairs, and Teaching and Learning create their own philosophies as well. Although all of these advising models may be thoughtful and appropriate for each unit's interactions with a particular group of students on campus, there is an inconsistency in the way in which advising is perceived and practiced. The mission of advising should support the overarching mission of the university, particularly in terms of its approach to teaching and learning, and to student development. The University of California, Berkeley should develop a coherent and consistent student-centered advising philosophy.

**Finding 3: The ATF found that there is a limited infrastructure for campus-wide communication and collaboration among advisors, as well as the managers and directors of advising staff on campus.**

Although there are current efforts to bring campus advisors together at a bi-annual advising conference held during spring break, or at occasional forums, or at webinars, there remains limited opportunity for ongoing communication among key stakeholders of advising on campus. Geographically, advisors are located in multiple buildings, and are spread across numerous colleges, divisions and majors. Advisors are supervised by deans, directors, Vice Provosts and Vice Chancellors.

**Finding 3.1** The ATF identified **five organizational conditions** that relate to advising:

- 1) Input, ideas, and feedback from front-line advising staff.
- 2) Coordinated decision-making (high level) and communication.
- 3) Resources (money, time, staffing, etc.) to carry out cross-campus coordination.
- 4) Resources and commitment to implement decisions (expertise, staff, time).
- 5) Approval/buy-in of advising unit heads to decisions.

**Finding 3.2** The ATF also identified the need for the following **six advising coordination functions**, articulated more fully as Appendix D:

- 1) *Institutional Structures and Practices for Advising at UCB.* High priorities in this area include developing a strategic plan for advising on campus and developing a student-centered advising philosophy for UC Berkeley.
- 2) *Communication for Advisors, Administrators, & Students.* High priorities in this area include communicating the above philosophy to campus and providing advising staff with knowledge of the organizational structure as it relates to advising.
- 3) *Assessment and Reward.* An example of a high priority in this area is the development of an inventory of existing advising resources that the campus community could use.
- 4) *Advising Tools.* A very high priority is the development of a website of advising services and resources for students, faculty, and staff. See sample at <http://www.uc.edu/registrar/advising/default.html>
- 5) *Professional Development and Ongoing Learning for Advisors.* A top priority in this area is the dedication of resources to build and implement learning opportunities for advisors.
- 6) *Advocacy and Compliance.* A high priority is ensuring that advisors have supervisory support. Other needs in this area



include the coordination of student policy and the development of a set of ethics and responsibilities.

**Finding 4: The ATF found that campus advisors had both a need and a desire for professional development opportunities.**

There is no consistent expectation of credentials or level of education and foundational knowledge among advisors on campus, and no workshops or trainings devoted specifically to professional development and ongoing learning about advising. An increase of such opportunities will promote career growth, increase advisor excellence and engagement, strengthen networks among advisors and provide an institutional acknowledgment of the important contributions that professional advising staff make to the Berkeley educational experience for students. By connecting professional development opportunities to the skills and knowledge requirements of the Student Services Job Families and core competencies within Career Compass, central campus demonstrates an institutional commitment to the career development of those who advise Berkeley students.

**Finding 4.1** The ATF identified five **job success factors** essential to successful advising:

- 1) *Foundation Skills and Knowledge* -- knowledge of learning and advising theory, understanding the role of the advisor, as well as legal and ethical issues, including FERPA.
- 2) *Institutional Skills and Knowledge* -- knowledge of campus mission, vision and values, an overview of campus resources, and the ability to follow policies and procedures.
- 3) *Practice Skills and Knowledge* -- understanding of trends and issues facing diverse students, causes of academic difficulty, advising the undeclared student, and helping students with career decisions.
- 4) *Interpersonal Skills and Knowledge* -- development of active listening skills, cross-cultural communication, and dealing with resistant learners.
- 5) *Work Effectiveness Skills and Knowledge* -- teamwork and collaboration, conflict management, time management and organization.

**Finding 5: The ATF found a need for an institutional acknowledgement of the professional advising staff.**

Professional development should be tied to recognizing and rewarding those master advisors currently on campus, and promoting the sharing of best advising practices in support of the institutional vision and mission. The institution should consider creating an

advising award for faculty and professional student advising staff who meet the criteria for excellence. The award could be designed and administered similar to the Distinguished Teaching Award. The National Academic Advising Association (NACADA) also recognizes regional and national leaders in advising. The campus could use the organization's existing criteria and then nominate our campus awardees for consideration of these prestigious awards.

**Finding 6: The ATF found that campus advisors look to central campus to demonstrate an institutional commitment to advising all Berkeley students.**

Because of the decentralized model of advising and the lack of a coherent and consistent mission or philosophy of advising students on campus, advisors look to central campus to recognize the importance and significance of their work with students, particularly as it supports the institutional mission of teaching and learning. Advisors often feel isolated and devalued on campus, and they would benefit from a stated commitment to the significant contribution of advising to the quality of the educational experience of all students.

## **RECOMMENDATIONS**

The following recommendations of the U.C. Berkeley Advising Task Force propose several cost-effective ways to address the above findings. Implementation of these recommendations will help the campus to achieve the goal of a seamless and positive advising experience for all Berkeley students, by improving communications among advisors, their directors, and their departments and colleges. Such communication and leadership will help reduce the existing duplication of effort and mixed messaging among advisors across campus, and will streamline efficiencies in a tight fiscal environment. These recommendations will also provide advisors with clearly defined professional development goals and learning opportunities. Both improved communication and professional development opportunities will have the additional benefit of clarifying job performance management goals, acknowledging mastery in advising practices, and improving advisor job satisfaction on campus.

**RECOMMENDATION #1: Implement several methods of improved communication, as well as mechanisms for sharing information among advisors and directors of advising staff across campus.**

This recommendation, which is based on Findings 1-3, supports a more seamless advising experience for all students, and a consistent and coherent campus-wide mission and philosophy of advising. The ATF recommends the following three proposals:

**1.a. Form a rotating Campus Committee of Advisors** to continue the work started this past year by the ATF. The **Campus Committee on Advising** would

be charged to improve the students' advising experience on campus by facilitating communication among all advising units, surfacing concerns from front-line advising staff, and serving as the primary working group on campus for addressing advising issues. The ATF proposes that this committee would create ad-hoc working groups to accomplish specific time-driven deliverables. To address several of the coordination functions outlined above, we recommend that the specific charge of the Campus Committee on Advising for the 2009-2010 academic year be to:

- Draft an advising mission/philosophy/values statement and vet with the campus;
- Assist with the coordination of the UC Berkeley advising conference (if there is one this year);
- Assist with the implementation of the proposed professional development activities (see Recommendation #2 below).

If approved, this group will meet approximately once a month. Membership will consist of 16 members, selected from among a wide spectrum of campus advisors, and will be staggered with one half of the group "retiring" each year and the other half continuing for their second year of service. Members will serve as a liaison to a "cluster" of advising departments/units and be responsible for communication between those departments and the committee. A proposal on the composition, criteria for participation, and organizational structure of this group is outlined in Appendix E. Given the current administrative reorganization, the executive co-sponsors for the Campus Committee on Advising would be Vice Provost for Teaching, Learning, Academic Planning and Facilities Cathy Koshland and Vice Chancellor for Equity and Inclusion Gibor Basri.

**1.b. Form an Advising Directors Round Table.** There is an interest among advising directors and managers to communicate and collaborate more fully across campus. In Spring 2009, a survey was administered electronically to advising administrators. Of the 53 managers and directors polled, 62% responded to the survey. The survey results showed that there is an interest among this group to communicate, collaborate and share best advising practices. Directors also reported a desire to participate in round table meetings at least once a semester.

We propose that the purpose of the Advising Directors Round Table be to:

- Improve the advising/educational experience of all students;
- Facilitate communication among all advising units;
- Vet ideas forwarded from the Campus Committee on Advising;
- Provide a forum for academic advising administrators;
- Promote the development of the advising workforce
- Participate in higher-level decision-making, when needed.

The charge of the Directors Round Table would be to:

- Share best practices, concerns, and information to improve advising services;
- Partner with COrWE to promote professional training and expertise among advising units on campus;
- Support leadership training, mentorship, and networking among advising directors;
- Provide feedback on proposed changes to advising policies and procedures;
- Assist executive leadership with strategic planning, communication and assessment on advising services.

If approved, the Advising Directors Round Table will be comprised of directors and managers of advising programs and those responsible for advising resources across campus. See Appendix F for a comprehensive list of advising programs within academic and administrative units. One or two individuals would serve as chair and/co-chair of the Roundtable and facilitate meetings, handle logistics, and develop agendas based on interests and needs of the group as well as issues, initiatives, and proposals submitted by the Campus Committee on Advising. In-person meetings would be held a minimum of two times per year, with virtual correspondence to take place throughout the year as needed. The ATF envisions that this group will meet in-person once a semester to build relationships, share information and best advising practices, and assist executive leadership with strategic planning, communication, and assessment of advising services on campus.

**1.c. Form a Steering Committee on Advising** co-chaired by Vice Provost for Teaching, Learning, Academic Planning and Facilities Cathy Koshland and Vice Chancellor for Equity and Inclusion Gibor Basri, so as to inform and consult with the executive leadership of campus.

The ATF envisions the above two advising committees working together in the following manner: the Steering Committee would include the Chair(s) of the Campus Committee on Advising and the Chair(s) of the Advising Director's Round Table, as well as one graduate and undergraduate student representative. The Steering Committee would provide continuity for all advising issues, practices and proposals on campus, allowing the Vice Provost and the Vice Chancellor to inform and consult the Council of Undergraduate Deans, the Dean of the Graduate Division, and members of the Chancellor's cabinet for all institutional decision-making regarding the advising of Berkeley's undergraduate and graduate students. This would allow the Vice Provost and Vice Chancellor to engage the executive leaders of campus on critical issues, policies and procedures for advising all students on the Berkeley campus.

**RECOMMENDATION #2. Define a strategy and curricula for the professional and career development of academic advisors on campus.**

This recommendation, based on Findings 4-6, will build an infrastructure for collaboration and learning among advising constituencies, improve communication, and promote consistent advising practices. The design of professional development activities, based on the Career Compass job requirements and core competencies for advisors, aims to strengthen ongoing learning, accountability and engagement, and institutional acknowledgement of the contribution of professional advising across campus. Providing professional growth and learning opportunities to the advising community will promote quality service to undergraduate and graduate students, enhancing the teaching and learning mission of the university.

The ATF recommends that the **Campus Committee on Advising** (Recommendation 1a) collaborate with the Center for Organization and Workforce Effectiveness (COrWE) to develop learning and development activities and to obtain institutional support for advisor participation in professional and career development. The committee would have the following action items to implement the professional development program as proposed:

**2.a. Provide advice on the professional development of advisors.**

- Develop an online survey for advisors to assess advisor competencies, skills and knowledge, as well as their interest in specific professional and career development opportunities.
- Identify campus advisors and others who can help teach advisors or develop online materials for advisors

**2b. Garner institutional support for advisor participation in professional and career development activities.**

- Identify levels of support needed for coordination and implementation of the professional development program.
- Encourage faculty and professional student advisors to participate in the professional/career development program as learners and teachers.

**2c. Implement professional development program**

- Partner with COrWE in the campus-wide implementation of professional development activities for advisors.
- Work with BSA to develop a part of the existing mentorship program specifically for advisors.
- Incorporate professional development activities into the campus-wide bi-annual Advising, Counseling, Mentoring Conference.

Details of this proposed professional development program drafted by the ATF can be found in Appendix G.

## **Resources for the Recommendations**

Participation in any of the committees proposed in Recommendation #1 would serve as a professional development opportunity for the participants in and of itself. The ATF believes that such participation would likewise benefit the committee member's home department, as well as the campus via increased communication and networking with other advisors. Participation on the Campus Committee on Advising would be limited to a two-year term. Participation on the Directors Round Table would be voluntary and limited to no more than two in-person meetings per year. Staffing needs for the Campus Committee will be provided in part out of the office of either of the executive co-sponsors. We do not anticipate a need to staff the Directors Round Table, where the chair(s) will coordinate such functions.

Resources for the proposed professional development program and other learning activities for advisors (Recommendation #2) will engage campus resources where possible to ensure relevance and cost-effectiveness. COrWE has committed staff and staff development funding resources to assist with the design, development, and implementation of learning activities to promote the professional and career development of advisors.

## **List of Appendices**

- Appendix A: Institutional Action Plan for Advising All Berkeley Students: A Report Based Upon Campus-Wide Collaborations and the NACADA Administrators' Institute
- Appendix B: Invitation Letter from Vice Provost Christina Maslach
- Appendix C: 2008-2009 UCB Advising Task Force (ATF) Roster
- Appendix D: Advising Coordination Functions
- Appendix E: Vice Provost's Committee on Advising Structure (2009-2010)
- Appendix F: UC Berkeley Advising Programs
- Appendix G: Professional Development Program for Advisors – 2 Year Plan
  - Attachment 1: Competency Model/ Curriculum Map
  - Attachment 2: Class Sequence for Advisor Certification
  - Attachment 3: On-Line Modules
  - Attachment 4: Process of Performance Measurement

## **APPENDIX A:**

### **Institutional Action Plan for Advising All Berkeley Students**





Institutional Action Plan for Advising All Berkeley Students:  
A Report Based upon Campus-wide Collaborations and  
the NACADA Administrators' Institute.

Report Submitted by:

Eva Rivas  
Director, Transfer, Re-entry, and Student Parent Center

Derek Van Rheenen  
Director, Athletic Study Center

Maria DePalma  
Assistant Director, College of Letters and Science

Susan Hagstrom  
Assistant Director, College of Letters and Science

To: Vice Provost Christina Maslach, Assistant Vice Provost Barbara Davis, Director Elizabeth Elliot, and Director Avis Hinkson  
Fr: Director Eva Rivas, Director Derek Van Rheenen, Assistant Director Maria DePalma, and Assistant Director Susan Hagstrom  
Re: Action Plan from NACADA Administrator's Institute: Campus-Wide Commitment to Advising for All Berkeley Students  
Date: 2/25/08

#### BACKGROUND

In January 2007, the Council of Undergraduate Deans (CUD) met and discussed advising on the Berkeley campus. Notes from the meeting reflect Executive Vice Chancellor and Provost George Breslauer's inquiries as to whether and how CUD might play a more regularized role in two critical areas of undergraduate education: advising and curriculum management. Specifically he asked whether CUD might 1) articulate some campus-wide goals, principles, and/or objectives for advising and 2) identify specific practices and policies that need to be changed or instituted in order to meet those articulated goals, principles, and or objectives.

Acting in her dual roles as Vice Provost for Undergraduate Education and Interim Dean of the Undergraduate Division of the College of Letters and Science, Christina Maslach forwarded this information to the joint College of Letters and Science Office of Undergraduate Advising and Division of Undergraduate Education (LSDUE) administrative management team for discussion and consideration.

As a result, in early fall 2007, Derek Van Rheenen and Susan Hagstrom, members of this joint LSDUE management team, submitted a proposal for an advising communication plan that would:

- Create a more seamless and positive undergraduate experience for students.
- Break down silos of privileged information across student service units: Increase accuracy, consistency and appropriateness of information and referrals given to students.
- Provide a common vehicle for posting "official" student service staff announcements.
- Learn from one another: Increase opportunities for general discussion, professional dialogue, and community-building among student service staff.
- Fully acknowledge the professional expertise of academic advisors/student affairs officers on campus.
- Include the Career Compass job mapping work in our efforts to ensure that we are in alignment with larger campus mission and goals.

Charged with furthering the development of an action plan to achieve these goals, the subcommittee was expanded to include Eva Rivas and Maria DePalma. This group of four was subsequently asked to attend the National Academic Advising Association's (NACADA's) Administrator's Institute in San Diego February 2008 to continue progress on this issue.

## FEBRUARY 2008 NACADA ADMINISTRATORS' INSTITUTE

During the intensive NACADA Administrators' institute, the four managers focused on creating an action plan "to strengthen communication among advisors in order to create a more seamless and positive advising experience for students at UC Berkeley." This plan was then reviewed and commented upon by colleagues from like institutions and senior NACADA faculty facilitating the Administrators' Institute.

The objectives of the Berkeley plan developed at the NACADA Institute fall into three broad categories:

- Strengthening mechanisms for the exchange of information.
- Networking and building-community across campus boundaries.
- Supporting opportunities for professional development in advising.

## CURRENT AND NEAR-TERM EFFORTS

The NACADA workgroup acknowledges and encourages the substantial progress that the campus is making in these three areas. A chart of these current and near-term efforts is attached as Addendum 1. Examples of this momentum include:

### *Strengthening mechanisms for the exchange of information*

- The Vice Provost for Undergraduate Education is sponsoring a new CalMessages listserv for the distribution of official advising-related memos.
- LSDUE is encouraging the revitalization of AdvisorNet, a grass-roots, advisor-driven campus networking and information-sharing organization.
- L&S department advisors have recently launched the on-line L&S Advising Help Desk <http://ls.berkeley.edu/?q=advising/helpdesk>.
- Assistant Vice Provost Barbara Davis's office is creating a flyer to be distributed at the UCB advising conference in March 2008 to encourage usage of the Cal Messages listserv, AdvisorNet, and the L&S Advising Help Desk.
- The Fall 2007 College of Letters and Science Colloquium on Undergraduate Education, entitled "Take My Advice—Please! Academic Advising at Cal" brought a large number of faculty, departmental and college advisors together to discuss the theoretical and practical application of advising at Berkeley.
- The LSDUE managers group will expand to include managers and key stakeholders from all undergraduate schools and colleges.
- LSDUE will seek inclusion of all schools and colleges at the Student Affairs Round Table.
- A proposal submitted for a roundtable discussion at the UCB Advising, Counseling, and Mentoring Conference will bring together staff from various advising units to review current LSDUE recommendations and discuss additional ways to improve campus-wide communication.

### *Networking and building community across campus boundaries*

- There is great momentum towards building a community of advisors and beginning to break down structural divisions on campus. Examples of these efforts include cross-unit field trips between advising groups such as Molecular and Cell Biology; Student Life Advising Services; Transfer, Re-entry, and Student Parent Center; Athletic Study Center; Career Center; College of Natural Resources; L&S Advising; and the Office of the Registrar.

- Several informal cross-unit gatherings and receptions have been held recently or will be held soon for campus advising staff (e.g., an LSDUE holiday party, the advising conference reception, L&S College mixers for department advisors, etc.).
- Satellite advising has taken root across campus, with staff from the Career Center, Haas Undergraduate School of Business, University Health Services, and the L&S Office of Undergraduate Advising meeting with students in places such as the residence halls and at the Cesar Chavez Student Center.
- The UCB advising conference, scheduled for March 24-26, 2008, will attract a campus-wide representation of Berkeley advising staff at a time of unprecedented campus interest in advising. The conference will be used as a forum to discuss specific institution-wide advising issues and will provide an opportunity for professional development.

*Supporting opportunities for professional development in advising*

- Interim Vice Chancellor Harry Le Grande and Vice Provost Christina Maslach have supported professional development of campus advisors with the purchase of NACADA's webinars, providing a training forum for all staff to learn about numerous advising topics, such as "Ensuring Advisor Success: Mastering the Art of Advising through the First Year of Advising and Beyond" and "Swirling to a Degree: The Ups and Downs of College Transfer."
- Vice Provost Christina Maslach, Assistant Vice Provost Barbara Davis, and Director of Workforce and Organizational Development Director Elizabeth Elliott provided administrative support for a Berkeley team of advising managers to attend the NACADA Administrators' Institute February 16-19, 2008 to create an institutional action plan for campus advising.
- In alignment with UC Berkeley's Career Compass process and the mapping of the student academic advising job field, the Center for Workforce and Organizational Development plans to design a campus-wide Advising Curriculum and a workforce architecture for professional development and training. Institutions throughout the country are heading in a similar direction and have provided the Berkeley representatives to the NACADA Institute with several examples. See also Addenda 2-4 of this document, NACADA's Concept of Academic Advising and Core Values of Academic Advising statements, as well as the Council for the Advancement of Standards in Higher Education (CAS) for Academic Advising
- Workforce and Organizational Development Director Elizabeth Elliott has discussed using the orientation and professional development of student academic advisors as a campus model for other job families and fields with Human Resources' implementation of Career Compass on campus.

## FUTURE DIRECTIONS

The guiding principle of NACADA's Administrator's Institute is beginning any institutional action plan with a clarification of the university's advising mission and vision. NACADA acknowledges that articulating a singular mission on advising is a difficult task; as such, NACADA has created Concept of Academic Advising and Core Values of Academic Advising statements to help in this effort (Addenda 2-3). NACADA also promotes use of the Council for the Advancement of Standards in Higher Education (CAS) for Academic Advising (Addendum 4). Many institutions have adopted these values and principles for their respective campuses.

In order for Berkeley to meet the objectives outlined above, we propose three possible models currently utilized at like institutions represented in NACADA. We also strongly encourage on-going administrator participation in NACADA. These four proposals are not mutually exclusive and could be implemented concurrently.

1. Hire a dedicated professional administrator responsible for coordinating campus-wide advisor development and communication. We believe that at UC Berkeley, this position should report to the Vice Provost for Undergraduate Education. The rationale for this reporting line is that advising is understood as a vital form of teaching. Please see the attached samples of two job descriptions at like institutions (Addenda 5a and 5b).
2. Create an Advising Administrators' Board, comprised of key managers from advising units across campus including all schools and colleges, Student Affairs, Undergraduate Education, and Equity and Inclusion. We recommend that the board have decision-making authority and report to the VP for Undergraduate Education. We also recommend a designated staff member within DUE be given time to work with this board. An example of Board by-laws and operational rules from a like institution's Advising Board is attached (Addendum 6). Also attached is a similar proposal authored in 2004 by Berkeley advisors Susan Cass, Kim Guilfoyle, and Kati Markowitz (Addendum 7).
3. Support grass roots efforts through which a community of practice can emerge organically. This might include revitalizing AdvisorNet and/or creating a new University Council of Academic Advisors. Institutional commitment in the form of cabinet level recognition and release time for participation would highlight the value and importance of advising on campus.
4. Encourage participation in NACADA, particularly at the administrator level. This would provide a common theoretical and professional foundation for our work, as well as professional networking opportunities and sharing of information and best-practices. The concerns and efforts shared by administrators at the recent institute were very similar to those at UC Berkeley.

In addition to the models outlined above, we recommend recognizing the best advising practices in support of the institutional mission and vision. Professional development should be tied to rewarding those master advisors currently on campus. The institution should consider creating an advising award for faculty and professional student affairs officers who meet the criteria for excellence. The award could be more formally designed by one of the latter two groups recommended above. NACADA also recognizes national leaders in advising. The campus could use the organization's existing criteria and then forward our campus recipients on to NACADA for consideration of their prestigious awards.

## CONCLUSION

In order to create a more seamless and positive undergraduate experience for students, it is imperative to have an institutional action plan to strengthen communication among advisors campus-wide. The areas highlighted in this proposed plan include strengthening mechanisms for the exchange of information, networking and building community across campus boundaries, and supporting opportunities for professional development in advising.

Building upon the momentum of the past academic year and a number of successful initiatives underway, we believe that the best way to accomplish the objectives of this plan are to consider hiring a dedicated professional administrator responsible for coordinating campus-wide advisor development and communication. In addition, we recommend supporting grass roots efforts on campus, such as AdvisorNet, and appointing an Advising Administrators' Board, comprised of key managers from advising units across campus. Our recent experience with fellow advising professionals at the NACADA Administrators' Institute leads us to support campus efforts to affiliate more formally with this national organization, drawing from its practical and theoretical expertise.

Sincerely,

Eva Rivas  
Director, Transfer, Re-entry, and Student Parent Center

Derek Van Rheenen  
Director, Athletic Study Center

Maria DePalma  
Assistant Director, College of Letters and Science

Susan Hagstrom  
Assistant Director, College of Letters and Science

#### RESOURCES

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

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

Council for the Advancement of Standards in Higher Education Standards (CAS) for Academic Advising <http://www.nacada.ksu.edu/Resources/Standards.htm>

#### ATTACHMENTS

Addendum 1: Berkeley's Institutional Action Plan for Advising-Chart Form  
Addendum 2: NACADA Concept of Academic Advising  
Addendum 3a, 3b, 3c: NACADA Core Values of Academic Advising  
Addendum 4: Council for the Advancement of Standards in Higher Education Standards (CAS) for Academic Advising  
Addendum 5a, 5b: Samples of Job Descriptions, Advising Campus Coordinator  
Addendum 6: Sample Advising Administrators' Board Bylaws & Operational Rules  
Addendum 7: 2004 U.C. Berkeley AdvisorNet Proposal

Addendum 1.

## CURRENT & NEAR-TERM EFFORTS

<b>GOALS &amp; Action Items</b>	<b>Lead person</b>	<b>Status</b>	<b>Target Dates</b>
<b>STRENGTHEN MECHANISMS FOR THE EXCHANGE OF INFORMATION</b>			
• Create official advising Cal Messages listserv	VP Maslach	In progress	Fall 2008
• Revitalize Advisornet listserv and website <ul style="list-style-type: none"> <li>◦ Reinstate Advisornet monthly meetings/workshops</li> </ul>	TBD	Proposed	3/24/08
• Advertise Cal Messages listserv, Advisornet, and L&S Advisor Help Desk	AVP Davis' office	Proposed	3/24/08
• Expand LS/DUE management group to include managers from Student Affairs & Schools and Colleges	AVP Davis VP Maslach	Proposed	Fall 2008
• Participate in Student Affairs Roundtable	AVP Davis	Completed	Spring 2008
• Campus-wide Colloquium related to advising <ul style="list-style-type: none"> <li>◦ Coordinate future colloquia related to advising</li> </ul>	L&S Policy Director	Completed	Fall 2007

	<b>Lead person</b>	<b>Status</b>	<b>Target Dates</b>
<b>NETWORKING &amp; BUILD COMMUNITY ACROSS CAMPUS BOUNDARIES</b>			
• Cross-unit field trip visits to other student service units	MCB, L&S/DUE, LS/OR/OUA	In progress	On-going
• Receptions and mixers <ul style="list-style-type: none"> <li>◦ Joint holiday celebrations</li> <li>◦ UCB conference reception</li> <li>◦ L&amp;S College &amp; department mixers and receptions</li> </ul>	LS/DUE Planning Cmte Avis Hinkson	Completed Up-coming On-going	Dec. 2007 Mar. 2008 F 07 - S 08
• Satellite Advising <ul style="list-style-type: none"> <li>◦ L&amp;S @ Residential Halls</li> <li>◦ L&amp;S @ Chavez / DSP</li> <li>◦ CPS @ Chavez</li> <li>◦ Career Ctr. @ L&amp;S</li> </ul>	Campus Partners	In progress In progress In progress F '05 – Sp '07	On-going On-going On-going
• UCB Advising conference	Planning Cmte	Up-coming	3/24-26/08

	<b>Lead person</b>	<b>Status</b>	<b>Target Dates</b>
<b>SUPPORT OPPORTUNITIES FOR PROFESSIONAL DEVELOPMENT WITHIN ADVISING</b>			
• NACADA Webinars	VP Maslach/ Interim VCUA Le Grande	In progress	Fall 07- Sp 08
• Develop campus-wide advising curriculum	Director Elliott	Proposed	Fall '08- Sp '09
• Fund participation in professional organizations such as NACADA	Individual units	Proposed	Fall '08- Sp '09
• Create advising awards to promote recognition of excellence in advising	Director Elliott	Proposed	Fall '08- Sp '09
• Utilize Career Compass mapping structure to guide professional development pathways	Director Elliott	Proposed	Fall '08- Sp '09

**National Academic Advising Association**

***CONCEPT OF ACADEMIC ADVISING***

**INTRODUCTION**

The National Academic Advising Association Board of Directors endorses three documents that champion the educational role of academic advising in a diverse world.

The three documents are:

- Concept of Academic Advising
- Statement of Core Values
- Council for the Advancement of Standards in Higher Education Standards and Guidelines for Academic Advising

These sets of guiding principles affirm the role of academic advising in higher education, thereby supporting institutional mission, while at the same time, anticipating the needs of 21st century students, academic advisors, and institutions.

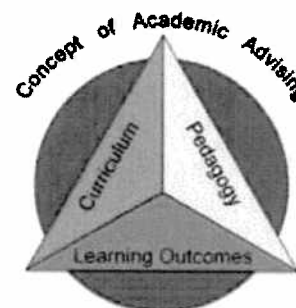
They can be used for a variety of purposes including professional development of academic advisors and program assessment. They also can be used when implementing a new advising program or revising a current one.

Academic advising is carried out by a vast array of individuals, including faculty and staff members. These guiding principles are intended for use by all who advise.

These documents support all categories of institutions with every type of advising delivery system. Intentionally, they do not address every detail and nuance of academic advising. Rather they should be used as starting points and references for a discussion of academic advising, providing the framework for a coherent approach to implementing a well-functioning academic advising program that would meet any specified institutional goals.

**PREAMBLE**

Academic advising is integral to fulfilling the teaching and learning mission of higher education. Through academic advising, students learn to become members of their higher education community, to think critically about their roles and responsibilities as students, and to prepare to be educated citizens of a democratic society and a global community. Academic advising engages students beyond their own world views, while acknowledging their individual characteristics, values, and motivations as they enter, move through, and exit the institution. Regardless of the diversity of our institutions, our students, our advisors, and our organizational structures, academic advising has three components: curriculum (what advising deals with), pedagogy (how advising does what it does), and student learning outcomes (the result of academic advising).





## THE CURRICULUM OF ACADEMIC ADVISING

Academic advising draws primarily from theories in the social sciences, humanities, and education. The curriculum of academic advising ranges from the ideals of higher education to the pragmatics of enrollment. This curriculum includes, but is not limited to, the institution's mission, culture and expectations; the meaning, value, and interrelationship of the institution's curriculum and co-curriculum; modes of thinking, learning, and decision-making; the selection of academic programs and courses; the development of life and career goals; campus/community resources, policies, and procedures; and the transferability of skills and knowledge.

## THE PEDAGOGY OF ACADEMIC ADVISING

Academic advising, as a teaching and learning process, requires a pedagogy that incorporates the preparation, facilitation, documentation, and assessment of advising interactions. Although the specific methods, strategies, and techniques may vary, the relationship between advisors and students is fundamental and is characterized by mutual respect, trust, and ethical behavior.

## STUDENT LEARNING OUTCOMES OF ACADEMIC ADVISING

The student learning outcomes of academic advising are guided by an institution's mission, goals, curriculum and co-curriculum. These outcomes, defined in an advising curriculum, articulate what students will demonstrate, know, value, and do as a result of participating in academic advising. Each institution must develop its own set of student learning outcomes and the methods to assess them. The following is a representative sample. Students will:

- craft a coherent educational plan based on assessment of abilities, aspirations, interests, and values
- use complex information from various sources to set goals, reach decisions, and achieve those goals
- assume responsibility for meeting academic program requirements
- articulate the meaning of higher education and the intent of the institution's curriculum
- cultivate the intellectual habits that lead to a lifetime of learning
- behave as citizens who engage in the wider world around them

## SUMMARY

Academic advising, based in the teaching and learning mission of higher education, is a series of intentional interactions with a curriculum, a pedagogy, and a set of student learning outcomes. Academic advising synthesizes and contextualizes students' educational experiences within the frameworks of their aspirations, abilities and lives to extend learning beyond campus boundaries and timeframes.



**National Academic Advising Association**

***THE STATEMENT OF CORE VALUES OF ACADEMIC ADVISING***

**INTRODUCTION**

The National Academic Advising Association (NACADA) is comprised of professional and faculty advisors, administrators, students, and others with a primary interest in the practice of academic advising. With diverse backgrounds, perspectives, and experiences, NACADA members advise in a variety of settings and work to promote quality academic advising within their institutions.

NACADA recognizes and celebrates the contributions of professional, faculty, para-professional, and peer advisors to the advising profession. NACADA acknowledges the complex nature of higher education institutions and the role academic advising plays within them, the wide variety of settings and responsibilities of academic advisors, and advisors' diverse backgrounds and experiences. NACADA provides a Statement of Core Values to affirm the importance of advising within the academy and acknowledge the impact that advising interactions can have on individuals, institutions and society.

The Statement of Core Values consists of three parts: 1) Introduction, 2) Declaration, and 3) Exposition, a descriptive section expanding on each of the Core Values. While each part stands alone, the document's richness and fullness of meaning lies in its totality.

The Statement of Core Values provides a framework to guide professional practice and reminds advisors of their responsibilities to students, colleagues, institutions, society, and themselves. Those charged with advising responsibilities are expected to reflect the values of the advising profession in their daily interactions at their institutions.

The Statement of Core Values does not attempt to dictate the manner in or process through which academic advising takes place, nor does it advocate one particular advising philosophy or model over another. Instead, these Core Values are the reference points advisors use to consider their individual philosophies, strengths, and opportunities for professional growth. Furthermore, the Core Values do not carry equal weight. Advisors will find some Core Values more applicable or valuable to their situations than others. Advisors should consider each Core Value with regard to their own values and those of their institutions.

Advising constituents, and especially students, deserve dependable, accurate, timely, respectful, and honest responses. Through this Statement of Core Values, NACADA communicates the expectations that others should hold for advisors in their advising roles. Advisors' responsibilities to their many constituents form the foundation upon which the Core Values rest.

The Statement of Core Values provides the guidance academic advisors seek from the National Academic Advising Association. The Statement is reviewed periodically to ensure its alignment with current professional practices and philosophies. The National Academic Advising Association encourages institutions to adopt the Statement of Core Values and support the work of those who provide academic advising.

National Academic Advising Association

## ***THE STATEMENT OF CORE VALUES OF ACADEMIC ADVISING***

### **DECLARATION**

#### ***1) Advisors are responsible to the individuals they advise.***

Academic advisors work to strengthen the importance, dignity, potential, and unique nature of each individual within the academic setting. Advisors' work is guided by their beliefs that students:

- have diverse backgrounds that can include different ethnic, racial, domestic, and international communities; sexual orientations; ages; gender and gender identities; physical, emotional, and psychological abilities; political, religious, and educational beliefs
- hold their own beliefs and opinions
- responsible for their own behaviors and the outcomes of those behaviors
- can be successful based upon their individual goals and efforts
- have a desire to learn
- have learning needs that vary based upon individual skills, goals, responsibilities, and experiences
- use a variety of techniques and technologies to navigate their world.

In support of these beliefs, the cooperative efforts of all who advise include, but are not limited to, providing accurate and timely information, communicating in useful and efficient ways, maintaining regular office hours, and offering varied contact modes.

Advising, as part of the educational process, involves helping students develop a realistic self-perception and successfully transition to the postsecondary institution. Advisors encourage, respect, and assist students in establishing their goals and objectives.

Advisors seek to gain the trust of their students and strive to honor students' expectations of academic advising and its importance in their lives.

#### ***2) Advisors are responsible for involving others, when appropriate, in the advising process.***

Effective advising requires a holistic approach. At many institutions, a network of people and resources is available to students. Advisors serve as mediators and facilitators who effectively use their specialized knowledge and experience for student benefit. Advisors recognize their limitations and make referrals to qualified persons when appropriate. To connect academic advising to students' lives, advisors actively seek resources and inform students of specialists who can further assess student needs and provide access to appropriate programs and services. Advisors help students integrate information so they can make well-informed academic decisions.

#### ***3) Advisors are responsible to their institutions.***

Advisors nurture collegial relationships. They uphold the specific policies, procedures, and values of their departments and institutions. Advisors maintain clear lines of communication with those not directly involved in the advising process but who have responsibility and authority for decisions regarding academic advising at the institution. Advisors recognize their individual roles in the success of their institutions.

#### ***4) Advisors are responsible to higher education.***

Academic advisors honor academic freedom. They realize that academic advising is not limited to any one theoretical perspective and that practice is informed by a variety of theories from the fields of social sciences, the

humanities, and education. They are free to base their work with students on the most relevant theories and on optimal models for the delivery of academic advising programs. Advisors advocate for student educational achievement to the highest attainable standard, support student goals, and uphold the educational mission of the institution.

*5) Advisors are responsible to their educational community.*

Academic advisors interpret their institution's mission as well as its goals and values. They convey institutional information and characteristics of student success to the local, state, regional, national, and global communities that support the student body. Advisors are sensitive to the values and mores of the surrounding community. They are familiar with community programs and services that may provide students with additional educational opportunities and resources. Advisors may become models for students by participating in community activities.

*6) Advisors are responsible for their professional practices and for themselves personally.*

Advisors participate in professional development opportunities, establish appropriate relationships and boundaries with advisees, and create environments that promote physical, emotional, and spiritual health. Advisors maintain a healthy balance in their lives and articulate personal and professional needs when appropriate. They consider continued professional growth and development to be the responsibility of both themselves and their institutions.

The Statement of Core Values provides the guidance academic advisors seek from the National Academic Advising Association. The Statement is reviewed periodically to ensure its alignment with current professional practices and philosophies. The National Academic Advising Association encourages institutions to adopt the Statement of Core Values and support the work of those who provide academic advising.

National Academic Advising Association

***THE STATEMENT OF CORE VALUES OF ACADEMIC ADVISING***

EXPOSITION

*Core Value 1: Advisors are responsible to the individuals they advise.*

- Academic advising is an integral part of the educational process and affects students in numerous ways. As advisors enhance student learning and development, advisees have the opportunity to become participants in and contributors to their own education. In one of the most important potential outcomes of this process, academic advising fosters individual potential.
- Regular student contact through in-person appointments, mail, telephone, E-mail, or other computer-mediated systems helps advisors gain meaningful insights into students' diverse academic, social, and personal experiences and needs. Advisors use these insights to assist students as they transition to new academic and social communities, develop sound academic and career goals, and ultimately, become successful learners.
- Advisors recognize and respect that students' diverse backgrounds are comprised of their ethnic and racial heritage, age, gender, sexual orientation, and religion, as well as their physical, learning, and psychological abilities. Advisors help students develop and reinforce realistic self-perceptions and help them use this information in mapping out their futures.
  - Advisors introduce and assist students with their transitions to the academic world by helping them see value in the learning process, gain perspective on the college experience, become more responsible and accountable, set priorities and evaluate their progress, and uphold honesty with themselves and others about their successes and limitations.
  - Advisors encourage self-reliance and support students as they strive to make informed and responsible decisions, set realistic goals, and develop lifelong learning and self-management skills.
  - Advisors respect students' rights to their individual beliefs and opinions.
  - Advisors guide and teach students to understand and apply classroom concepts to everyday life.
  - Advisors help students establish realistic goals and objectives and encourage them to be responsible for their own progress and success.
  - Advisors seek to understand and modify barriers to student progress, identify ineffective and inefficient policies and procedures, and work to affect change. When the needs of students and the institution are in conflict, advisors seek a resolution that is in the best interest of both parties. In cases where the student finds the resolution unsatisfactory, they inform students regarding appropriate grievance procedures.
  - Advisors recognize the changing nature of the college and university environment and diversity within the student body. They acknowledge the changing communication technologies used by students and the resulting new learning environments. They are sensitive to the responsibilities and pressures placed on students to balance course loads, financial and family issues, and interpersonal demands.
  - Advisors are knowledgeable and sensitive regarding national, regional, local, and institutional policies and procedures, particularly those governing matters that address harassment, use of technology, personal relationships with students, privacy of student information, and equal opportunity.

### Addendum 3c

- Advisors are encouraged to investigate all available avenues to help students explore academic opportunities.
- Advisors respect student confidentiality rights regarding personal information. Advisors practice with an understanding of the institution's interpretation of applicable laws such as the Federal Educational Rights and Privacy Act (FERPA).
- Advisors seek access to and use student information only when the information is relevant to the advising process. Advisors enter or change information on students' records only with appropriate institutional authorization to do so.
- Advisors document advising contacts adequately to meet institutional disclosure guidelines and aid in subsequent advising interactions.

*Core Value 2: Advisors are responsible for involving others, when appropriate, in the advising process.*

- Academic advisors must develop relationships with personnel critical to student success including those in such diverse areas as admissions, orientation, instruction, financial aid, housing, health services, athletics, academic departments, and the registrar's office. They also must establish relationships with those who can attend to specific physical and educational needs of students, such as personnel in disability services, tutoring, psychological counseling, international study, and career development. Advisors must also direct students, as needed, to experts who specialize in credit transfers, co-curricular programs, and graduation clearance.
- Because of the nature of academic advising, advisors often develop a broad understanding of an institution and a detailed understanding of student needs and the resources available to help students meet those needs. Based upon this understanding:
  - advisors can have an interpretative role with students regarding their interactions with faculty, staff, administrators, and fellow students, and
  - advisors can help the institution's administrators gain a greater understanding of students' needs.
- Students involved in the advising process (such as peer advisors or graduate assistants) must be adequately trained and supervised for adherence to the same policies and practices required of the professional and faculty advisors and other specially trained staff advising in the unit/institution.

*Core Value 3: Advisors are responsible to their institutions.*

- Advisors work in many types of higher education institutions and abide by the specific policies, procedures, and values of the department and institution in which they work. When circumstances interfere with students' learning and development, advisors advocate for change on the advisees' behalf with the institution's administration, faculty, and staff.
- Advisors keep those not directly involved in the advising process informed and aware of the importance of academic advising in students' lives. They articulate the need for administrative support of advising and related activities.

### Addendum 3c

- Advisors increase their collective professional strength by constructively and respectfully sharing their advising philosophies and techniques with colleagues.
- Advisors respect the opinions of their colleagues; remain neutral when students make comments or express opinions about other faculty or staff; are nonjudgmental about academic programs; and do not impose their personal agendas on students.
- Advisors encourage the use of models for the optimal delivery of academic advising programs within their institutions.
- Advisors recognize their individual roles in the success of their institutions and accept and participate in institutional commitments that can include, but are not limited to, administrative and committee service, teaching, research, and writing.

#### *Core Value 4: Advisors are responsible to higher education in general.*

- Advisors accept that one goal of education is to introduce students to the world of ideas in an environment of academic freedom. Advisors demonstrate appreciation for academic freedom.
- Advisors base their work with students on the most relevant theoretical perspectives and practices drawn from the fields of social sciences, the humanities, and education.
- One goal of advising is to establish, between students and advisors, a partnership that will guide students through their academic programs. Advisors help students understand that learning can be used in day-to-day application through exploration, trial and error, challenge, and decision making.
- Advisors advocate for student educational achievement to the highest attainable standards and support student goals as they uphold the educational mission of the institution.
- Advisors advocate for the creation, enhancement, and strengthening of programs and services that recognize and meet student academic needs.

#### *Core Value 5: Advisors are responsible to their educational community.*

- Many institutions recognize the importance of integrating classroom learning with community experience, study abroad, and programs that bridge the gap between the academic and off-campus environments.

### Addendum 3c

Where such programs exist, advisors help students understand the relationship between the institution and local, regional, national, and international communities.

- Advisors advocate for students who desire to include study abroad or community service learning into their co-curricular college experience, and they make appropriate referrals to enable students to achieve these goals.
- Advisors understand the intricacies of transfer between institutions and make appropriate referrals to enable students to achieve their goals.

*Core Value 6: Advisors are responsible for their professional practices and for themselves personally.*

- Advisors use the Statement of Core Values to guide their professional actions.
- Advisors seek opportunities to grow professionally. They identify appropriate workshops, classes, literature, research publications, and groups, both inside and outside the institution, that can keep their interest high, hone professional skills, and advance expertise within specific areas of interest.
- Advisors seek cross cultural opportunities to interact with and learn more about ethnic communities, racial groups, religions, sexual preferences, genders, and age levels, as well as physical, learning, and psychological abilities and disabilities found among the general student population.
- Advisors recognize that research topics are embedded in academic advising practice and theory. Advisors engage in research and publication related to advising as well as in areas allied with their training and disciplinary backgrounds. Advisors' research agendas safeguard privacy and provide for the humane treatment of subjects.
- Advisors are alert to the demands surrounding their work with students and the necessity of taking care of themselves physically, emotionally, and spiritually to best respond to high level demands. They learn how to maintain a 'listening ear' and provide sensitive, timely responses that teach students to accept their responsibilities. Advisors establish and maintain appropriate boundaries, nurture others when necessary, and seek support for themselves both within and outside the institution.

The Statement of Core Values provides the guidance academic advisors seek from the National Academic Advising Association. The Statement is reviewed periodically to ensure its alignment with



### Addendum 3c

current professional practices and philosophies. The National Academic Advising Association encourages institutions to adopt the Statement of Core Values and support the work of those who provide academic advising.

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## **ACADEMIC ADVISING PROGRAM CAS STANDARDS and GUIDELINES**

### **Part 1. MISSION**

The primary purpose of the Academic Advising Program (AAP) is to assist students in the development of meaningful educational plans.

AAP must incorporate student learning and student development in its mission. AAP must enhance overall educational experiences. AAP must develop, record, disseminate, implement, and regularly review its mission and goals. Its mission statement must be consistent with the mission and goals of the institution and with the standards in this document. AAP must operate as an integral part of the institution's overall mission.

The institution must have a clearly written mission statement pertaining to academic advising that must include program goals and expectations of advisors and advisees.

### **Part 2. PROGRAM**

The formal education of students is purposeful, holistic, and consists of the curriculum and the co-curriculum. The Academic Advising Program (AAP) must identify relevant and desirable student learning and development outcomes and provide programs and services that encourage the achievement of those outcomes.

Relevant and desirable outcomes include: intellectual growth, effective communication, realistic self-appraisal, enhanced self-esteem, clarified values, career choices, leadership development, healthy behaviors, meaningful interpersonal relations, independence, collaboration, social responsibility, satisfying and productive lifestyles, appreciation of diversity, spiritual awareness, and achievement of personal and educational goals.

AAP must provide evidence of its impact on the achievement of student learning and development outcomes.

The table below offers examples of achievement of student learning and development outcomes.

<b>Desirable Student Learning and Development Outcomes</b>	<b>Examples of Achievement</b>
<b>Intellectual growth</b>	Examines information about academic majors and minors; Understands the requirements of an academic degree plan, as well as institutional policies and procedures; Employs critical thinking in problem solving on selection of major and course

	selection; Uses complex information from a variety of sources including personal experience and observation to form a decision or opinion; Declares a major; Achieves educational goals; Applies previously understood information and concepts to a new situation or setting; Demonstrates understanding of a general education and expresses appreciation for literature, the fine arts, mathematics, sciences, and social sciences
<b>Personal and educational goals</b>	Sets, articulates, and pursues individual goals; Articulates personal and educational goals and objectives; Uses personal and educational goals to guide decisions; Produces a schedule of classes in consultation with advisors. Understands the effect of one's personal and education goals on others
<b>Enhanced self-esteem</b>	Shows self-respect and respect for others; Initiates actions toward achievement of goals; Evaluates reasonable risks with regard to academic course selection and course load when conferring with advisors
<b>Realistic self-appraisal</b>	Evaluates personal and academic skills, abilities, and interests and uses this appraisal to establish appropriate educational plans; Makes decisions and acts in congruence with personal values and other personal and life demands; Focuses on areas of academic ability and interest and mitigates academic weaknesses; Uses information on degree program requirements, course load, and course availability to construct a course schedule; Seeks opportunities for involvement in co-curricular activities; Seeks feedback from advisors; Learns from past experiences; Seeks services for personal needs (e.g., writing labs and counseling)
<b>Clarified values</b>	Demonstrates ability to evaluate personal values and beliefs regarding academic integrity and other ethical issues; Articulates personal values; Acts in congruence with personal values; Identifies personal, work, and lifestyle values and explains how they influence decision-making in regard to course selection, course load, and major and minor selections
<b>Career choices</b>	Describes career choice and choices of academic major and minor based on interests, values, skills, and abilities; Documents knowledge, skills, and accomplishments resulting from formal education, work experience, community service and volunteer experiences; Makes the connections between classroom and out-of-classroom learning; Identifies the purpose and role of career services in the development and attainment of academic and career goals
<b>Independence</b>	Operates autonomously by attending advising sessions or programs or by seeking the advice of advisors in a timely

	fashion; Correctly interprets and applies degree audit information; Selects, schedules, and registers for courses in consultation with advisors-
<b>Effective communication</b>	Communicates personal and academic strengths and weaknesses that affect academic plans; Demonstrates ability to use campus technology resources; Composes appropriate questions when inquiring about particular requirements, departments, and resources
<b>Leadership development</b>	Articulates leadership philosophy or style; Serves in a leadership position in student, community, or professional organizations; Comprehends the dynamics of a group; Exhibits democratic principles as a leader; Exhibits ability to visualize a group purpose and desired outcomes
<b>Healthy behavior</b>	Exhibits personal behaviors that promote a healthy lifestyle; Articulates the relationship between health and wellness and accomplishing life long goals; Exhibits behaviors that advance a healthy campus and community
<b>Meaningful Interpersonal Relationships</b>	Develops relationships with academic advisors, faculty members, students, and other institution staff to be engaged with the institution in meaningful ways; Listens to and considers others' points of view; Treats others with respect
<b>Collaboration</b>	Works cooperatively with others; Seeks the involvement of others; Seeks feedback from others; Contributes to achievement of group goals; Exhibits effective listening skills
<b>Social responsibility</b>	Understands the requirements of the codes of conduct; Understands and practices principles of academic integrity; Understands and participates in relevant governance systems; Understands, abides by, and participates in the development, maintenance, and orderly change of community, social, and legal standards or norms; Appropriately challenges the unfair, unjust, or uncivil behavior of other individuals or groups; Participates in service and volunteer activities
<b>Satisfying and productive lifestyles</b>	Achieves balance among academic course load requirements, work, and leisure time; Develops plans to satisfy academic requirements, work expectations, and leisure pursuits; Identifies and works to overcome obstacles that hamper goal achievement; Functions on the basis of personal identity, ethical, spiritual, and moral values; Articulates long-term goals and objectives
<b>Appreciating diversity</b>	Selects course offerings that will increase understanding of one's own and others' identity and cultures; Seeks involvement with people different from oneself; Demonstrates an appreciation for diversity and the impact it has on society

<b>Spiritual awareness</b>	Identifies campus and community spiritual and religious resources, including course offerings; Develops and articulates personal belief system; Understands roles of spirituality in personal and group values and behaviors
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**Both students and advisors must assume shared responsibility in the advising process. AAP must assist students to make the best academic decisions possible by encouraging identification and assessment of alternatives and consideration of the consequences of their decisions.**

The ultimate responsibility for making decisions about educational plans and life goals should rest with the individual student.

**AAP must be guided by a set of written goals and objectives that are directly related to its stated mission. AAP must:**

- **Promote student growth and development**
- **Assist students in assessing their interests and abilities, examining their educational goals, making decisions and developing short-term and long-term plans to meet their objectives**
- **Discuss and clarify educational, career, and life goals**
- **Provide accurate and timely information and interpret institutional, general education, and major requirements**
- **Assist students to understand the educational context within which they are enrolled**
- **Advise on the selection of appropriate courses and other educational experiences**
- **Clarify institutional policies and procedures**
- **Evaluate and monitor student academic progress and the impact on achievement of goals**
- **Reinforce student self-direction and self-sufficiency**
- **Direct students with educational, career or personal concerns, or skill/learning deficiencies to other resources and programs on the campus when necessary.**
- **Make students aware of and refer to educational, institutional, and community resources and services (e.g., internship, study abroad, honors, service-learning, research opportunities)**
- **Collect and distribute relevant data about student needs, preferences, and performance for use in institutional decisions and policy**

AAP should provide information about student experiences and concerns regarding their academic program to appropriate decision makers.

**AAP must be (a) intentional, (b) coherent, (c) based on theories and knowledge of teaching, learning and human development, (d) reflective of developmental and**

**demographic profiles of the student population, and (e) responsive to the needs of individuals, special populations, and communities.**

AAP should make available to academic advisors all pertinent research (e.g., about students, the academic advising program, and perceptions of the institution).

**The academic advisor must review and use available data about students' academic and educational needs, performance, and aspirations.**

**AAP must identify environmental conditions that may positively or negatively influence student academic achievement and propose interventions that may neutralize negative conditions.**

**AAP must provide current and accurate advising information to students and academic advisors.**

AAP should employ the latest technologies for delivery of advising information.

**Academic advising conferences must be available to students each academic term.**

Academic advisors should offer conferences in a format that is convenient to the student, i.e., in person, by telephone, or on-line. Advising conferences may be carried out individually or in groups.

**Academic advising caseloads must be consistent with the time required for the effective performance of this activity.**

The academic status of the student being advised should be taken into consideration when determining caseloads. For example, first year, undecided, under-prepared, and honors students may require more advising time than upper division students who have declared their majors.

Academic advisors should allow an appropriate amount of time for students to discuss plans, programs, courses, academic progress, and other subjects related to their educational programs.

When determining workloads it should be recognized that advisors may work with students not officially assigned to them and that contacts regarding advising may extend beyond direct contact with the student.

### **Part 3. LEADERSHIP**

**Effective and ethical leadership is essential to the success of all organizations. Institutions must appoint, position, and empower Academic Advising Program (AAP) leaders within the administrative structure to accomplish stated missions. Leaders at various levels must be selected on the basis of formal education and training, relevant work experience as an advisor, personal skills and competencies, knowledge of the literature of academic advising, relevant professional credentials, as well as potential for promoting learning and development in students, applying effective practices to educational processes, and enhancing institutional effectiveness. Institutions must determine expectations of accountability for AAP leaders and fairly assess their performance.**

**AAP leaders must exercise authority over resources for which they are responsible to achieve their respective missions.**

**AAP leaders must:**

- **articulate a vision for their organization**
- **set goals and objectives based on the needs and capabilities of the population served**
- **promote student learning and development**
- **prescribe and practice ethical behavior**
- **recruit, select, supervise, and develop others in the organization**
- **manage financial resources**
- **coordinate human resources**
- **plan, budget for, and evaluate personnel and programs**
- **apply effective practices to educational and administrative processes**
- **communicate effectively**
- **initiate collaborative interactions between individuals and agencies that possess legitimate concerns and interests in academic advising**

**AAP leaders must identify and find means to address individual, organizational, or environmental conditions that inhibit goal achievement.**

**AAP leaders must promote campus environments that result in multiple opportunities for student learning and development.**

**AAP leaders must continuously improve programs and services in response to changing needs of students and other constituents and evolving institutional priorities.**

#### **Part 4. ORGANIZATION and MANAGEMENT**

**Guided by an overarching intent to ensure student learning and development, Academic Advising Programs (AAP) must be structured purposefully and**

managed effectively to achieve stated goals. Evidence of appropriate structure must include current and accessible policies and procedures, written performance expectations for all employees, functional workflow graphics or organizational charts, and clearly stated service delivery expectations.

Evidence of effective management practices must include use of comprehensive and accurate information for decisions, clear sources and channels of authority, effective communication practices, decision-making and conflict resolution procedures, responsiveness to changing conditions, accountability and evaluation systems, and recognition and reward processes. AAP must provide channels within the organization for regular review of administrative policies and procedures.

The design of AAP must be compatible with the institution's organizational structure and its students' needs. Specific advisor responsibilities must be clearly delineated, published, and disseminated to both advisors and advisees.

Students, faculty advisors, and professional staff must be informed of their respective advising responsibilities.

AAP may be a centralized or decentralized function within an institution, with a variety of people throughout the institution assuming responsibilities.

AAP must provide the same services to distance learners as it does to students on campus. The distance education advising must provide for appropriate real time or delayed interaction between advisors and students.

## Part 5. HUMAN RESOURCES

The Academic Advising Program (AAP) must be staffed adequately by individuals qualified to accomplish its mission and goals. Within established guidelines of the institution, AAP must establish procedures for staff selection, training, and evaluation; set expectations for supervision; and provide appropriate professional development opportunities. AAP must strive to improve the professional competence and skills of all personnel it employs.

Academic advising personnel may be full-time or part-time professionals who have advising as their primary function or may be faculty whose responsibilities include academic advising. Paraprofessionals (e.g., graduate students, interns, or assistants) or peer advisors may also assist advisors.

An academic advisor must hold an earned graduate degree in a field relevant to the position held or must possess an appropriate combination of educational



**credentials and related work experience.**

Academic advisors should have an understanding of student development, student learning, career development, and other relevant theories in education, social sciences, and humanities.

Academic advisors should have a comprehensive knowledge of the institution's programs, academic requirements, policies and procedures, majors, minors, and support services.

Academic advisors should demonstrate an interest and effectiveness in working with and assisting students and a willingness to participate in professional activities.

**Sufficient personnel must be available to address students' advising needs without unreasonable delay.**

**Degree or credential-seeking interns must be qualified by enrollment in an appropriate field of study and by relevant experience. These individuals must be trained and supervised adequately by professional staff members holding educational credentials and related work experience appropriate for supervision.**

**Student employees and volunteers must be carefully selected, trained, supervised, and evaluated. They must be trained on how and when to refer those in need of assistance to qualified staff members and have access to a supervisor for assistance in making these judgments. Student employees and volunteers must be provided clear and precise job descriptions, pre-service training based on assessed needs, and continuing staff development.**

**AAP must have technical and support staff members adequate to accomplish its mission. Staff members must be technologically proficient and qualified to perform their job functions, be knowledgeable of ethical and legal uses of technology, and have access to training. The level of staffing and workloads must be adequate and appropriate for program and service demands.**

Support personnel should maintain student records, organize resource materials, receive students, make appointments, and handle correspondence and other operational needs. Technical staff may be used in research, data collection, systems development, and special projects.

**Technical and support personnel must be carefully selected and adequately trained, supervised, and evaluated.**

**AAP staff must recognize the limitations of their positions and be familiar with**

**institutional resources to make appropriate referrals.**

**Salary levels and fringe benefits for all AAP staff members must be commensurate with those for comparable positions within the institution, in similar institutions, and in the relevant geographic area.**

**AAP must institute hiring and promotion practices that are fair, inclusive, and non-discriminatory. AAP must employ a diverse staff to provide readily identifiable role models for students and to enrich the campus community.**

**AAP must create and maintain position descriptions for all staff members and provide regular performance planning and appraisals.**

**AAP must have a system for regular staff evaluation and must provide access to continuing education and professional development opportunities, including in-service training programs and participation in professional conferences and workshops.**

**AAP must strive to improve the professional competence and skills of all personnel it employs.**

Continued professional development should include areas such as the following and how they relate to academic advising:

- theories of student development, student learning, career development, and other relevant theories in education, social sciences, and humanities
- academic policies and procedures, including institutional transfer policies and curricular changes
- legal issues including US Family Education and Records Privacy Act (FERPA)/Canadian Freedom Of Information and Protection of Privacy (FOIPP) and other privacy laws and policies
- technology and software training (e.g., degree audit, web registration)
- institutional resources (e.g., research opportunities, career services, internship opportunities, counseling and health services, tutorial services)
- ADA compliance issues

## **Part 6. FINANCIAL RESOURCES**

**The Academic Advising Program (AAP) must have adequate funding to accomplish its mission and goals. Funding priorities must be determined within the context of the stated mission, goals, objectives, and comprehensive analysis of the needs and capabilities of students and the availability of internal and external resources.**

**AAP must demonstrate fiscal responsibility and cost effectiveness consistent with institutional protocols.**

Special consideration should be given to providing funding for the professional development of advisors.

Financial resources should be sufficient to provide high-quality print and web-based information for students and training materials for advisors. Sufficient financial resources should be provided to promote the academic advising program.

## **Part 7. FACILITIES, TECHNOLOGY, and EQUIPMENT**

**The Academic Advising Program (AAP) must have adequate, suitably located facilities, adequate technology, and equipment to support its mission and goals efficiently and effectively. Facilities, technology, and equipment must be evaluated regularly and be in compliance with relevant federal, state, provincial, and local requirements to provide for access, health, safety, and security.**

**AAP must assure that online and technology-assisted advising includes appropriate mechanisms for obtaining approvals, consultations, and referrals.**

**Data about students maintained on individual workstations and departmental or institutional servers must be secure and must comply with institutional policies on data stewardship.**

**Academic advisors must have access to computing equipment, local networks, student data bases, and the Internet.**

**Privacy and freedom from visual and auditory distractions must be considered in designing appropriate facilities.**

## **Part 8. LEGAL RESPONSIBILITIES**

**The Academic Advising Program (AAP) staff members must be knowledgeable about and responsive to laws and regulations that relate to their respective responsibilities. Staff members must inform users of programs and services and officials, as appropriate, of legal obligations and limitations including constitutional, statutory, regulatory, and case law; mandatory laws and orders emanating from federal, state, provincial, and local governments; and the institution's policies.**

**Academic advisors must use reasonable and informed practices to limit the liability exposure of the institution, its officers, employees, and agents.**

**Academic advisors must be informed about institutional policies regarding personal liability and related insurance coverage options.**

**The institution must provide access to legal advice for academic advisors as needed to carry out assigned responsibilities.**

**The institution must inform academic advisors and students, in a timely and systematic fashion, about extraordinary or changing legal obligations and potential liabilities.**

## **Part 9. EQUITY AND ACCESS**

**The Academic Advising Program (AAP) staff members must ensure that services and programs are provided on a fair and equitable basis. Facilities, programs, and services must be accessible. Hours of operation and delivery of and access to programs and services must be responsive to the needs of all students and other constituents. AAP must adhere to the spirit and intent of equal opportunity laws.**

**AAP must be open and readily accessible to all students and must not discriminate except where sanctioned by law and institutional policy. Discrimination must especially be avoided on the basis of age; color; creed; cultural heritage; disability; ethnicity; gender identity; nationality; political affiliation; religious affiliation; sex; sexual orientation; or social, economic, marital, or veteran status.**

**Consistent with the mission and goals, AAP must take affirmative action to remedy significant imbalances in student participation and staffing patterns.**

**As the demographic profiles of campuses change and new instructional delivery methods are introduced, institutions must recognize the needs of students who participate in distance learning for access to programs and services offered on campus. Institutions must provide appropriate services in ways that are accessible to distance learners and assist them in identifying and gaining access to other appropriate services in their geographic region.**

## **PART 10. CAMPUS and EXTERNAL RELATIONS**

**The Academic Advising Program (AAP) must establish, maintain, and promote effective relations with relevant campus offices and external agencies.**

**Academic advising is integral to the educational process and depends upon close working relationships with other institutional agencies and the administration. AAP**

should be fully integrated into other processes of the institution. Academic advisors should be consulted when there are modifications to or closures of academic programs.

For referral purposes, AAP should provide academic advisors a comprehensive list of relevant external agencies, campus offices, and opportunities.

#### **Part 11. DIVERSITY**

**Within the context of the institution's unique mission, diversity enriches the community and enhances the collegiate experience for all; therefore the Academic Advising Program (AAP) must nurture environments where similarities and differences among people are recognized and honored.**

**AAP must promote educational experiences that are characterized by open and continuous communication that deepen understanding of one's own identity, culture and heritage, and that of others. AAP must educate and promote respect about commonalities and differences in historical and cultural contexts.**

**AAP must address the characteristics and needs of a diverse population when establishing and implementing policies and procedures.**

#### **Part 12. ETHICS**

**All persons involved in the delivery of the Academic Advising Program (AAP) must adhere to the highest of principles of ethical behavior. AAP must develop or adopt and implement appropriate statements of ethical practice. AAP must publish these statements and ensure their periodic review by relevant constituencies.**

**Advisors must uphold policies, procedures, and values of their departments and institutions.**

Advisors should consider ethical standards or other statements from relevant professional associations.

**AAP staff members must ensure that privacy and confidentiality are maintained with respect to all communications and records to the extent that such records are protected under the law and appropriate statements of ethical practice. Information contained in students' education records must not be disclosed without written consent except as allowed by relevant laws and institutional policies. AAP staff members must disclose to appropriate authorities information judged to be of an emergency nature, especially when the safety of the individual or others is involved, or when otherwise required by institutional policy or**

**relevant law.**

When emergency disclosure is required, AAP should inform the student that it has taken place, to whom, and why.

**All AAP staff members must be aware of and comply with the provisions contained in the institution's human subjects research policy and in other relevant institutional policies addressing ethical practices and confidentiality of research data concerning individuals.**

**All AAP staff members must recognize and avoid personal conflict of interest or appearance thereof in their transactions with students and others.**

**All AAP staff members must strive to ensure the fair, objective, and impartial treatment of all persons with whom they deal. AAP staff members must not participate in nor condone any form of harassment that demeans persons or creates intimidating, hostile, or offensive campus environment.**

**When handling institutional funds, all AAP staff members must ensure that such funds are managed in accordance with established and responsible accounting procedures and the fiscal policies or processes of the institution.**

**AAP staff members must perform their duties within the limits of their training, expertise, and competence. When these limits are exceeded, individuals in need of further assistance must be referred to persons possessing appropriate qualifications.**

**AAP staff members must use suitable means to confront and otherwise hold accountable other staff members who exhibit unethical behavior.**

**AAP staff members must be knowledgeable about and practice ethical behavior in the use of technology.**

### **Part 13. ASSESSMENT and EVALUATION**

**The Academic Advising Program (AAP) must conduct regular assessment and evaluations. AAP must employ effective qualitative and quantitative methodologies as appropriate, to determine whether and to what degree the stated mission, goals, and student learning and development outcomes are being met. The process must employ sufficient and sound assessment measures to ensure comprehensiveness. Data collected must include responses from students and other affected constituencies.**

467 **AAP must evaluate periodically how well they complement and enhance the**  
468 **institution's stated mission and educational effectiveness.**

469  
470 **Results of these evaluations must be used in revising and improving programs**  
471 **and services and in recognizing staff performance and the performance of**  
472 **academic advisors.**

**Coordinator for Student Support  
Office of the Vice President for Academic Affairs and Provost  
University of Minnesota – Twin Cities**

The Office of the Senior Vice President for Academic Affairs and Provost seeks a highly qualified individual to serve as the Coordinator for Student Support Services. This is 100% time, P and A, class 9354 position. This position will work with administrators, faculty, advisors and staff members on the Twin Cities campus in the development and support of programs and services designed to provide high quality services to undergraduate students across the Twin Cities campus.

**Duties and Responsibilities:**

- With staff in the Office of the Senior Vice President for Academic Affairs and Provost provide leadership for the student service program development;
- Chair task groups related to advising and student support services;
- Develop materials and training programs for Twin Cities student support personnel;
- Work with college administrators, advisors and student support personnel to create, develop, and maintain student support activities and programs across the Twin Cities campus;
- Other duties, as assigned.

**Required Qualifications:**

- Masters degree;
- At least five years experience in student support services and at least two years in an administrative role;
- Demonstrated success in building strong relationships with the academic departments, advisors and faculty and building alliances with colleagues;
- Demonstrated leadership abilities, integrity and strong work ethic; and,
- Commitment to valuing and actively promoting diversity.

**Desired Qualifications:**

- Experience in effectively managing an executive level office;
- Demonstrated ability to work with administrators, faculty and students;
- Experience in the use of technology for undergraduate advising;
- Proficiency in written and verbal communication; and,
- Demonstrated ability to manage complex interrelated operations in such a way that they are both internally efficient and contribute to the academic success of undergraduate students.

The position will begin September 1, 2007, and will report to the Associate Vice Provost.

For further information, please contact Laura Coffin Koch, [koch@umn.edu](mailto:koch@umn.edu) or 612.624.1085. To apply for this position please send a letter of interest, resume, and the names and contact information for 3 references to: Leslie Zenk, [zenklr@umn.edu](mailto:zenklr@umn.edu), 170M Morrill Hall, by August 15, 2007.



## ARIZONA STATE UNIVERSITY SERVICE PROFESSIONAL

<b>TITLE:</b>	<b>Director, Academic Services</b>	<b>JOB CODE:</b>	<b>091497</b>
		<b>GRADE:</b>	<b>99</b>
		<b>FLSA:</b>	<b>E</b>

### **PRIME FUNCTION:**

The Director of the ASU Academic Advising Training and Professional Development Resources office coordinates, organizes and implements university-wide training and professional development strategies for all ASU academic advisors. This position reports to the Executive Director, University College Academic Advising, and will also be guided by a university-wide steering committee.

### **DUTIES AND RESPONSIBILITIES:**

- Establish and maintain a uniform advising training program which incorporates the academic advising institutional philosophy and the establishment of academic advising training standards.
- Initiate and promote professional development opportunities for academic advisors.
- Maintain the ASU Academic Advisor Handbook and related materials.
- Establish a clearinghouse for advisor-related national training programs and academic advising research materials and topics.
- Participate in development, maintenance and implementation of university policies and procedures related to academic advising.
- Coordinate institutional participation in academic advising related workshops, conferences, national organizations (NACADA, etc).
- Complete (assist in developing, collecting and maintaining) data on ASU academic advisor related research, surveys, evaluations, etc.
- Coordinate the development of academic advising program and learning outcomes assessment strategies.
- Identify and catalog new developments and best practices in academic advising at the university and nationally.
- Participate on ASU academic advisor related committees, boards, etc (AAB, AAAC, CAA, etc).
- Coordinate and implement academic advisor recognition programs.
- Establish and facilitate a first year academic advisor support group.
- Identify fiscal resources and structures to enhance academic advising recruitment, training and re-training programs across all ASU colleges.
- Supervise support staff.
- Serve as a University representative at state, regional and national organizations, boards, councils, and committees as assigned.

## ARIZONA STATE UNIVERSITY SERVICE PROFESSIONAL

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		<b>GRADE:</b>	<b>99</b>
		<b>FLSA:</b>	<b>E</b>

### **KNOWLEDGE, SKILLS AND ABILITIES:**

- Knowledge of the principles and practices pertaining to academic advising, recruitment/retention, and/or student support functions.
- Knowledge of management, leadership and supervisory principles and practices.
- Skill in planning, analyzing and coordinating activities and establishing priorities.
- Skill in program design and development.
- Skill in both verbal and written communication skills.
- Skill in establishing and maintaining effective working relationships.
- Skill to create and deliver effective workshops as well as provide effective training to others.
- Knowledge of fundamental budget management methods and techniques.

### **MINIMUM QUALIFICATIONS:**

Master's degree AND six (6) years experience in one or more of the following: advising, recruitment/retention, other related student services in a college/university environment, which includes four (4) years of supervisory experience; OR, Any equivalent combination of education and/or experience from which comparable knowledge, skills and abilities have been achieved.

### **DESIRED QUALIFICATIONS:**

Doctorate degree in Higher Education, Counseling, or related field.

**Arizona State University**  
**Advising Administrator's Board (AAB)**  
<http://www.asu.edu/provost/committees/AAB.html>

**Purpose:** The purpose of this board is to optimize the effectiveness of undergraduate academic advising by providing a forum for those individuals who have academic advising administration responsibilities on the campuses of Arizona State University, to identify and discuss common issues, to develop and/or propose resolutions to problems, and to refer concerns to appropriate university administrators, departments and/or committees. It is a forum for exchange of information, mutual support, and creative activity relevant to academic advising at ASU.

Historically, the goals of the Board have been to improve academic advising for both students and academic advisors, communicate shared opportunities for students, and keep each other abreast of changes.

**Membership:** The Board consists of those individuals who supervise academic advisors and/or oversee the delivery of academic advising in the following areas:

- Each college and free standing school on all ASU campuses
- The Department of Intercollegiate Athletics
- Council of Academic Advisors president or designee
- Provost Office representative
- Director, ASU Academic Advising Training & Professional Development

In order to best reach our goals, ex-officio memberships may be extended to staff members from appropriate units as relevant (see agenda Items below).

**Operational Guidelines:**

**Meetings:** Held once a month throughout the year. Currently, meetings are scheduled for the first Wednesday of each month from 3-5 p.m. Teleconference technology allows for a meeting room on each ASU campus to participate in the meeting.

**Chair:** The previous year's co-chair becomes the chair each year beginning in July.

- facilitates meetings
- develops agenda
- contacts guests
- sends call to meeting notice
- serves as liaison to the University Community as needed
- schedule rooms, etc. for meetings

**Co-Chair:** Volunteer or nominee each year in May or June.

- stand in for chair when needed
- summarizes action items in minutes

**Goals:** Set each August to guide the board for the academic year.

Minutes Notes: Should be kept in a brief, summary format provided by the co-chair, and distributed to the AAB listserv (see below).

Agenda items: Established by the members, reflect needs of the group, and promote positive relations with various university departments such as:

- Undergraduate Admissions
- New Student Programs
- Office of the Registrar
- Academic Transfer Articulation Office
- Community College Liaison
- Extended Education
- Disability Resource Center
- University Technology Office
- International Programs Office
- Residential Life/Learning Communities
- Student Financial Assistance/Scholarships
- Institutional Analysis
- e-Advisor, PeopleSoft/OASIS, etc.
- Other student and academic services offices, as appropriate

Roundtable/updates: each meeting provides an opportunity for an exchange of information among the AAB members within a collegial and supportive environment.

List serve: AAB will maintain a listserv for members and key representatives to maintain communication channels. Any list serve member may post notes to this list serve. The list serve will be maintained by the AAB chairperson.

**AdvisorNet Proposal for an UC Berkeley Advising Council; October 2004**

Susan Cass, *Nutritional Science and Toxicology*; Kim Guilfoyle, *Haas Business School*;  
Kati Markowitz, *Neuroscience Graduate Program*

*Need for Advising Council (Why):*

Along with research and teaching, advising plays a major role in the quality of the educational experience of graduate and undergraduate students at UC Berkeley. From program planning to preparation for the Oral Qualifying exam as well as personal and career development, staff and faculty play a key role in mentoring students through the process of preparing for their futures as professionals, scholars, and citizens.

Institutions of higher education across the country recognize advising as a skilled pursuit supported by a body of professional literature and educational training. Just as important as the committees established to ensure sound research and thoughtful pedagogy, a campus advising council would serve the need to develop and guide effective advising programs. We propose that an advising council would:

- Encourage the development of a prevailing advising philosophy and elevate the role advising plays in the overall educational experience for students,
- Unify the leadership and management of advising on campus,
- Establish clear lines of communication essential for a decentralized campus by creating a central repository of advising resources and information, and
- Ensure professional training and expertise among the units/departments.

*Advising Council Charge/Goals (What):*

- Develop and continue to assess and refine campus-wide advising values and philosophy,
- Develop and continue to assess and refine campus-wide advising mission and its goals,
- Develop standardized advising programs assessment tools and disseminate them for use in different advising centers and units on campus,

## Addendum 7 - 2004 U.C. Berkeley AdvisorNet Proposal

- Develop standardized advising professionals evaluation tools and disseminate them through Human Resources for use in Student Affairs Officer's annual evaluations,
- Develop an advising professionals reward system and implement it through the Staff Infrastructure Steering Committee and the Office of Human Resources,
- Develop an appropriate faculty advisers' reward system and implement it through the Academic Senate,
- Develop and implement a comprehensive advisor training and development program for both faculty and staff advisors,
- Provide the central venue for timely and effective dissemination of advising information to all campus stakeholders: policies and procedures; best practices; open forum for discussion of advising issues,
- Act as consultative body on academic advising issues to the Academic Senate and Executive Administration,
- Advocate for advising and the advising profession, and
- Engage in an ongoing dialogue and re-evaluation of the Advising Council's role and practices.

### *Advising Council Reporting Line (Where):*

- Charged by and accountable to the Executive Vice Chancellor and Provost, thus covering the entire academic side of the campus.

### *Advising Council Membership (Who):*

- 4 representatives from the Academic Senate,
- 1 representative from the Office of the Registrar,
- 1 representative from the L&S Undergraduate Dean's Office,
- 1 representative from the Graduate Dean's Office,
- 1 representative from the Vice Chancellor for Student Affairs' Office,
- 1 representative from the Vice Provost for undergraduate Education's Office,
- 2 representatives from the major student advising/services centers such as Career Center, Office of Student Life, Student Learning Center, etc.,

## Addendum 7 - 2004 U.C. Berkeley AdvisorNet Proposal

- 2 representatives of non-L&S College advising centers (ie. CNR, CED, College of Chemistry, College of Engineering),
- 2 departmental undergraduate professional advisors from different colleges, and
- 2 departmental graduate professional advisors from different programs

The Advising Council should have approximately 17 voting members; ideally, 1 FTE should be devoted to providing staff support to the Council.

### *Advising Council Working Procedures (How):*

- The Executive Vice Chancellor and Provost should appoint the membership of the Advising Council in consultation with major advising units, departments, and the Academic Senate,
- The membership of the Advising Council should rotate every 3 years, with initial membership staggered so that 5-6 members have 1-year appointments, 5-6 have 2-year appointments, and 5-6 have 3-year appointments,
- Every year, 1/3 of the membership should cycle off,
- New members should come from units/departments that have parallel function[s] to those of the departing members,
- 1 FTE, a senior professional advisor, should provide administrative, analytical and coordinating support to the Council (this is an “ideal” scenario; the Council could function by apportioning tasks to its members until the FTE can be secured),
- The Council should have monthly meetings of the full membership,
- The Council could charge subcommittees to work in different subjects or on specific Council projects; subcommittees should have representation of Council members, but could also include subject matter specialists from around campus as needed (for instance, on the reward system for staff advisors, Human Resources should be part of the process from the start).

## **APPENDIX B:**

**Invitation Letter from Vice Provost Christina Maslach, July 2008**



# UNIVERSITY OF CALIFORNIA, BERKELEY

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SANTA BARBARA • SANTA CRUZ

OFFICE OF THE VICE PROVOST FOR  
TEACHING AND LEARNING  
228 CALIFORNIA HALL #1500

BERKELEY, CALIFORNIA 94720-1500

July 17, 2008

Anne Aaboe, L&S Biological Sciences  
Anna del Rosario, College of Chemistry  
Maria DePalma, L&S Office of Undergraduate Advising  
Leah Flanagan, L&S Social Sciences  
Kim Guilfoyle, Haas School of Business  
Eugenia Guruwaya-Foon, College of Engineering  
Melissa Hacker, L&S Arts and Humanities  
Susan Hagstrom, L&S Office of Undergraduate Advising  
Emmanuel Lopez, Student Affairs  
Cristobal Olivares, Student Affairs  
Moirá Perez, Graduate Division  
Eva Rivas, Equity & Inclusion  
Dexter Stewart, L&S Physical Sciences  
Dawn Strough, L&S Interdisciplinary Studies  
Donna Symon, College of Natural Resources  
Marty Tuttle, College of Environmental Design  
Derek Van Rheenen, Teaching and Learning

Dear Colleagues:

I am writing to invite you to serve on the newly created UC Berkeley Advising Task Force for a one-year term from September 2008 through June 2009. This invitation is based upon your proven commitment to advising students, and my belief that your input will be invaluable to the stated charge and goals of the Advising Task Force.

The charge of the UC Berkeley Advising Task Force is to provide more broad-based input into the development and implementation of the Berkeley Plan for advising all Berkeley students and fostering better communication among key stakeholders. The goals of this plan are to:

- 1) Strengthen mechanisms for the exchange of information.
- 2) Network and build community across campus boundaries.
- 3) Support opportunities for professional development in advising.

It is my hope that the Task Force will help identify specific practices and policies that need to be changed and/or implemented in order to meet the articulated goals of this institutional plan. The Task Force will be co-chaired by Susan Hagstrom and Eva Rivas.

We are asking the following of all Task Force members:

- Serve as a liaison to their area/dept/unit for a year
- Be an active participant

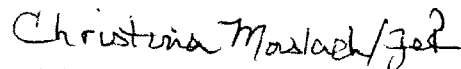
- Attend meetings regularly
- Be willing to facilitate town hall meetings, focus groups, etc.

Our expectation is that meetings will proceed on a bi-weekly basis, with the possibility of member participation on smaller working groups, as determined by the Task Force.

Please email Joyce Rawlins ([jrawlins@berkeley.edu](mailto:jrawlins@berkeley.edu)) by August 8<sup>th</sup> to let us know whether you accept this nomination.

I look forward to meeting with you and working to create a more seamless and positive advising experience for students at UC Berkeley.

Sincerely,

A handwritten signature in dark ink, appearing to read "Christina Maslach/Jed".

Christina Maslach  
Vice Provost – Teaching and Learning  
& Professor of Psychology

Attachment

cc: Linda Finch Hicks, L&S Social Sciences  
Roseanne Fong, Student Affairs  
Bob Giomi, College of Engineering  
Troy Gilbert, Student Affairs  
Barbara Gross Davis, Equity and Inclusion  
Avis Hinkson, L&S Office of Undergraduate Advising  
Renate Holub, L&S Interdisciplinary Studies  
Kimberly Johnson, College of Natural Resources  
Paulette Powell, L&S Arts and Humanities  
Sandra Rehling, College of Chemistry  
Andrew Szeri, Graduate Division  
Miquel Villas-Boas, Haas School of Business  
Kayoko Wakamatsu, L&S Interdisciplinary Studies  
Susan Wells, L&S Physical Sciences  
Chris Williams, College of Environmental Design  
Auben Winters, L&S Biological Sciences

## APPENDIX C

### UCB Advising Task Force Membership as of 1/26/09:

Student Affairs: Cristobal Olivares, 643-2463 / [cmo@berkeley.edu](mailto:cmo@berkeley.edu) and Emmanuel Lopez, [e.lopez@berkeley.edu](mailto:e.lopez@berkeley.edu)

Grad Division: Moira Perez 642-5068 / [moirap@berkeley.edu](mailto:moirap@berkeley.edu)

Equity and Inclusion: Eva Rivas 643-5740 / [erivas@berkeley.edu](mailto:erivas@berkeley.edu)

Teaching and Learning: Derek Van Rheenen 642-0605 / [dvr@berkeley.edu](mailto:dvr@berkeley.edu)

College of L&S, Office of Undergrad Advising: Maria DePalma 643-6094 / [mdepalma@berkeley.edu](mailto:mdepalma@berkeley.edu)

L&S Biological Sciences: Anne Aaboe 643-7473 / [aaaboe@berkeley.edu](mailto:aaaboe@berkeley.edu)

L&S Physical Sciences: Dexter Stewart 642-8520 / [dstewart@astro.berkeley.edu](mailto:dstewart@astro.berkeley.edu)

L&S Arts and Humanities: Melissa Hacker 642-2678 / [melhacker@berkeley.edu](mailto:melhacker@berkeley.edu)

L&S Social Sciences: Leah Flanagan 642-0356 / [leahf@berkeley.edu](mailto:leahf@berkeley.edu)

L&S Interdisciplinary Studies: ~~(was Dawn Strough)~~ TBA

College of Engineering: Eugenia Guruwaya-Foon 642-7594 / [eugenia@coe.berkeley.edu](mailto:eugenia@coe.berkeley.edu)

College of Natural Resources: Donna Symon 642-0542 /

College of Environmental Design: ~~Marty Tuttle 642-4944 / [dtuttle@berkeley.edu](mailto:dtuttle@berkeley.edu)~~ and Susan Hagstrom 642-3888 / [hagstrom@berkeley.edu](mailto:hagstrom@berkeley.edu)

College of Chemistry: Anna del Rosario 643-1745 / [delrosa@berkeley.edu](mailto:delrosa@berkeley.edu)

Haas School of Business: Kim Guilfoyle 642-3944 / [king@haas.berkeley.edu](mailto:king@haas.berkeley.edu)

Center for Organizational and Workforce Development, Director: Liz Elliott 642-3836 / [elliott@berkeley.edu](mailto:elliott@berkeley.edu)

## **APPENDIX D**

### **Advising Coordination Functions 2/17/09 Draft**

#### **Structures & Practices for Advising at UCB**

- HIGHEST PRIORITY: Develop advising philosophy for the campus
- HIGHEST PRIORITY: Plan strategically for advising all students on campus
- Identify issues for the board
- Coordinate advising services w/Kuali
- What forms the center for advising?
- Repository for best practices
- Common practices for staff

#### **Communication for Advisors & Students**

- HIGHEST PRIORITY: Provide knowledge of organizational structure
- HIGHEST PRIORITY: Communicate philosophy to campus
- Foster networking opportunities(connect links between advisors)
- Create master calendar (see tools)
- Community building
- Facilitate relationships
- Promote use of existing faculty resources
- Facilitate/enable communication between advisors and board
- Respond to Board Decisions

#### **Assessment**

- HIGHEST PRIORITY: Assemble and evaluate existing resources and needs for effective institutional advising
- Assess training needs (see training)
- Survey of advisors / students
- Case studies to test structures
- Inventory campus advising resources (see tools)
- What exists already? What works, What does not work?

#### **Tools**

- HIGHEST PRIORITY: Create a website for advising services, benefiting students, faculty, staff. See <http://www.uc.edu/registrar/advising/default.html>
- Master calendar (see communication)
- Flow Charts
- Handouts for students, i.e. who is my advisor?
- Help desk for advisors
- Professional development library (see training)
- Map of where advisors are on campus
- Link website to MyBerkeleyApp
- Inventory campus advising resources (see tools)
- Technology

#### **Training & On-going Learning for Advisors**

- HIGHEST PRIORITY: Assess training needs for advisors across campus(see assessment)
- Coordinate Advisor training
- Professional development library (see tools)
- Coordination of the UCB Advising Conference

#### **Advocacy & Compliance**

- HIGHEST PRIORITY: Ensure supervisory support for advisors
- Coordinate policy (student)
- Bill of Rights for students
- Develop set of ethics and responsibilities [For advisors or students or both? See NACADA on student and advisor responsibilities].

# APPENDIX E

## Advising Task Force Membership and Liaison Groups

15 Task Force members, each of whom represents a cluster of advisers/advising units, plus Chair.

	Academic Affairs					Teaching & Learning Plus	Equity & Inclusion	Student Affairs
	College of L&S	COC, COE, CED, CNR	Professional Schools	Graduate Division	FPF, Summer, BPSA, UCDC			
Number of ATF members	3	3	2	1	1	1	2	2
GR or UG	one GR, two UG	one GR, two UG	GR	GR	UG	UG	either	one GR, one UG
Other?	three diff divisions	three diff colleges	two diff schools				reps divide liaisons in half	reps divide liaisons in half
	Arts & Humanities	Chemistry	Education	Graduate Division	Fall Program for Freshmen (Extension)	Athletic Study Center	Academic Achievement	Admissions & Enrollment
	Biological Science	Engineering	Haas School of Business	Graduate Diversity Program	Summer Sessions	Student Learning Center	Coalition for E&D (BSP, CCSP, CUES, PDP)	Campus Life & Leadership
	Undergraduate Interdisciplinary Studies	Environmental Design	Information		Berkeley Programs for Study Abroad	Undergraduate Research	Disabled Students' Program	Career Center
	Physical Science	Natural Resources	Journalism		UCDC	Scholarship Connection	Gender & Equity Center	Counseling & Psych Services
	Social Science		Law				Graduate Diversity Program	Office of Student Development
	L&S Office of Undergraduate Advising		Optometry				Incentive Awards Program	Berkeley International Office
			Public Health				Multicultural Student Development	Financial Aid
			Public Policy				SAGE Scholars	Health Promotion
			Social Welfare				Student Life Advising Services/EOP	
							Transfer, Re-Entry & Student Parent Center	

Recommendation: Chair is "unaffiliated" and not responsible for a cluster

Goals of this model:

- Ensure 70% undergrad and 30% grad representation to mirror student population.
- Base clusters on common advising practices rather than divisional alignments.

Criteria for ATF members: SAO I or higher; supervisor approval; one year at UCB; ability to commit for two years; committed to fulfilling ATF responsibilities

## APPENDIX F - UCB Advising Programs

EVCP (George Breslauer)	Teaching and Learning (Christina Maslach)	Student Affairs (Harry Le Grande)	Equity and Inclusion (Gibor Basri)	Health and Human Services (Steve Lustig)
Grad Division (Szeri)	Athletic Study Center	Campus Life and Leadership	Academic Achievement Programs	Career Counseling Library
Extension	Student Learning Center	Residential & Student Service Programs	Gender Equity Resource Center	
Summer Session		Admissions and Enrollment (Fin Aid)	Multicultural Student Development	
Fall Program for Freshmen		New Student Services	Student Life Advising Services/EOP	
Chemistry, College of		Student Service Systems (liaison role?)	Transfer, Re-entry, and Student Parent Center	
Education, Graduate School of		Career Center	Disabled Students' Program	
Engineering, College of		Summer Bridge	Chem Scholars?	
Environmental Design, College of		EAP/Study Abroad?	SAGE Scholars Program?	
Haas School of Business			Incentive Awards Program?	
			Multicultural Engineering Program? (part of COE?)	
Information, School of			Professional Development Program?	
Journalism, School of			Biology Scholars Program?	
Law, School of				
Letters and Science, College of				
Natural Resources, College of				
Optometry, School of				
Public Health, School of				
Public Policy, Richard & Rhoda Goldman School of				
Social Welfare, School of				

## **APPENDIX G:**

### **Professional Development Program for Advisors – 2 Year Plan**

- Attachment 1: Competency Model/ Curriculum Map
- Attachment 2: Class Sequence for Advisor Certification
- Attachment 3: On-Line Modules
- Attachment 4: Process of Performance Measurement

## **ADVISOR PROFESSIONAL DEVELOPMENT PROGRAM PROPOSAL FOR THE UCB CAMPUS**

### **INTRODUCTION**

The Professional Development ATF subcommittee has designed a learning and development program for advisors on the Berkeley campus. The focus of the program is to encourage sharing best practices and advisor-to-advisor learning in order to support excellence in advising for our students. The proposed program will include (1) open-enrollment workshops, webinars, information panels and interactive forums, (2) online learning modules and books/articles for self-study, (3) cohort-based classes for selected groups of advisors, (4) on-the-job training with mentors, and (5) networking opportunities for advisors across the whole campus. The professional development program is based on the Career Compass job requirements for advisors and the campus core competencies. The subcommittee has partnered with the Center for Organizational and Workforce Effectiveness to develop a formal course for advisors and to define specific professional development modules.

### **Purpose and Goals of Advisor Professional Development**

The overall goal of the Advising Task Force is to strengthen communication among advisors in order to create a more seamless and positive advising experience for all students attending UC Berkeley.

The Purpose and goals of the ATF Subcommittee #2 are:

1. Provide learning and professional growth opportunities for advisors
2. Establish a common foundation of job knowledge and skills for effective student advising
3. Support the creation of a campus-wide advising community to improve collaboration and promote consistent advising practices
4. Promote greater campus recognition of the important value student advising provides (advising is teaching)

### **Background and History of Project**

As a part of the Career Compass initiative, Berkeley Campus Human Resources has recently completed Job Family matrices for most jobs on campus, including the Student Services field. Skills and knowledge have been identified for each position in each job family. Given this new job classification system, we can now design career development maps to help employees identify ways to gain the skills and knowledge they need to succeed in their current jobs and prepare for future opportunities.

The Student Services Job Field includes three Job Families that provide a wide range of support services to Berkeley students. The competence of members of this Job Field is essential to ensuring that our students, especially undergraduates, receive the best education possible. There are over 600 employees in this Job Field and campus projections suggest that succession planning and training are critical now. Efforts are underway to educate and



provide professional development for members of this Job Field; however no comprehensive career development program currently exists.

In 2002, a grass-roots campus organization, AdvisorNet, was created by UCB advisors to promote advisor professional development, and worked on advisor professional development and networking ideas through 2005, when it went dormant because of lack of institutional support. In February 2008, a team of advisors attended a workshop at the NACADA Administrators' Institute in San Diego to develop a plan for the campus. This plan was presented for discussion at the campus Advising Conference in March 2008. As a result, the Advising Task Force was created. Subcommittee 2 was charged with designing a learning and development program for advisors on the Berkeley campus.

The Subcommittee worked on this project throughout 2008-2009 and has now partnered with CORWE to finalize this proposal.

#### Benchmarking: Advisor Professional Development Models at UCB and Elsewhere

The following advisor professional development programs were examined by the ATF Subcommittee 2, as models and sources of ideas.

1. UC Riverside: Professional Academic Advisor Certification Course
  - A cohort-based, year-long course of 8 sessions of 3 hours each leading to a certificate of completion.
2. UC Davis: Student Advising Certificate Series
  - A series of 13 workshops ranging in length from 3 to 14 hours, of which 6 are required for a certificate of completion and the remaining 7 are elective.
3. UC Berkeley L & S New Advisor Training Curriculum
  - A 29-module guide for new advisors for on-the-job training supervised and signed off by mentors.
4. University of Cincinnati
  - An academic masters' level course in Student Learning Theory combined with a comprehensive menu of online tools and information to support advisors.
5. National Academic Advising Association (NACADA)
  - An online masters' level program offered in conjunction with the University of Kansas.

#### **ADVISOR COMPETENCY MODEL**

This model is arranged in five tiers, which include sets of related skills, knowledge and abilities that are essential for successful performance in the advising job fields represented. Further, the model provides knowledge and skill mapping against the proposed instructional strategy. The competency model demonstrates that the program design incorporates and supports relevant Career Compass core competencies in all training components.

(See attachment 1)

## **ADVISOR PROFESSIONAL DEVELOPMENT STRATEGY**

The strategy is based on the following assumptions about the principles of adult learning, the needs of the Berkeley advising community, and the logistical/resource realities of the campus today:

- (1) Adult learning tends to work best when designed as follows: 10% formal content/didactic learning, 20% coaching & mentoring, 70% on-the-job learning.
- (2) There is a body of foundational knowledge for advisors that needs to be acquired in a formal content/didactic learning context – cohort-based classes with a lead instructor, homework and assignments. This is the most often expressed need among the campus advising community.
- (3) Since foundational skills are applicable across all categories of advisors, the cohort class would be relevant to all categories of advisors. Some additional topics that will be presented in workshops, information panels, interactive forums and webinars will be more specific to certain advisor categories.
- (4) The calendar of activities and events will be determined by the UCB academic calendar in order to provide a schedule that will offer events during times of minimal pressure on advisors.
- (5) Maximize the use of online learning modules, including a learning module on how to access all the internal and external online resources available as tools and information for advisors.
- (6) Host a variety of learning events in which advisors come together and interact with each other, to offer greater opportunity for networking and a shared body of knowledge regarding best practices among campus advisors.
- (7) All participation in learning activities, including online learning, will be documented and tracked in the UCB Learning Management System for reporting purposes. Additionally, training hours documented in LMS may be utilized to attain Continuing Education units and/or a Certificate, if consensus is found that either determination is feasible.

## **PROFESSIONAL DEVELOPMENT COMPONENTS**

### **Component 1: Two instructor-led cohort-based classes: "Learning and Advising Theory" and "Skills and Techniques for Successful Student Advising"**

- Each class to consist of 5 sessions of 2-3 hours each, for selected groups of up to 25 advisors.
- One class to be offered each semester, preferably on a low peak time such as Friday mornings once a month.

- Possible instructors for the course: UCB faculty, experienced UCB advisors, off-campus faculty from UCB Extension, CSU.
- Suggested textbook: Student Services: A Handbook for the Profession. By Susan R. Komives and Dudley B. Woodard (Jossey-Bass 2003)

(See Attachment 2)

**Component 2: Open enrollment workshops (2 per semester/2 Hours each: 12 Hours Total)**

- Workshop topics:
  - 1) Understanding Cal and UC
  - 2) Legal and Ethical Issues in Advising/FERPA
  - 3) Understanding the Role of the UCB Advisor
  - 4) Teamwork and Collaboration
  - 5) Supervising Student Workers
  - 6) Conflict Management
  - 7) Overview of Campus Resources

**Component 3: NACADA Webinars (7 per year, 2 hours each: 14 hours Total)**

- To be scheduled at noon time to allow people to participate in a brown-bag lunch format
- Webinars will include an interactive component, consisting of a facilitated discussion regarding the content immediately following the broadcast
- NACADA Webinar topics
  - 1) The Role of Academic Advising in Student Persistence
  - 2) Advising Undecided/Undeclared Students for Success
  - 3) Using the CAS Standards, NACADA Core Values, and NACADA Concept of Academic Advising to Assess Your Advising Program
  - 4) Advising Students on Academic Probation
  - 5) Effective Academic Advising Strategies
  - 6) Breaking Bad News: Delivery Techniques that Help Students Make Good Alternative Choices
  - 7) The Role of Faculty Advisors in Student Success

**Component 4: Other Learning Activities, e.g., Presentation Panels and Interactive Forums**

- Topics will provide an overview of campus resources, which include but are not limited to;
  - 1) Sproul, Tang
  - 2) Residential Life
  - 3) Student Development
  - 4) Teaching and Learning
  - 5) Equity and Inclusion
  - 6) Student Conduct

- 7) Cal Student Demographics
- 8) Tour of the Campus

**Component 5: Online learning modules**

This component will allow participants access to learning and study aids, as well as a pace of study, which will best suit their individual needs. Modules are mapped to job competencies to assist with the identification of projected areas of professional development, based on the advisor's self-assessment. The modules target various levels of learners and will be of use to participants at any level of proficiency. All courses and materials are accessible 24/7 to UCB staff with Cal-Net ID via the "BLU" portal under "E-Learn". (See Attachment 3)

**Component 6: On-the-job training with mentors**

This component will provide activities to develop and enhance specific knowledge of policies, procedures and knowledge of the particular academic or student services unit. Methodology is based on the L&S model. The Berkeley Staff Assembly Mentoring Program will also be utilized for development of mentors.

**Component 7: Bi-Annual Berkeley Advising Conference (*For Discussion*)**

**TARGET AUDIENCE, SELECTION, REGISTRATION AND TRACKING**

- Selection for semester-long cohort classes:

- Top priority audience: staff in the 3 Student Services Fields that have the most face-to-face and multi-dimensional advising relationship with students.

- (1) Student Academic Advising
- (2) Student Life & Development (Residential Advisors)
- (3) Student Services Advising

Eventually, the programs could be extended to staff in the other 6 Student Services Fields, or even faculty advisors if interested.

- Targeted career level: mid-career level 2-3-4 advisors (though open, if capacity permits, to level 1 advisors and to advising supervisors)
- Process:
  - Interested advisors obtain approval from their advising supervisor
  - An advising supervisor may require an advisor take one or both of the classes
  - In both cases, release time to be granted by advising supervisor
  - Focus on advisors who do not have Masters' degrees in fields such as higher education, counseling or student development
  - Balance first-come-first-served with desirability of broad-based representation of different campus units and constituencies.

- Selection for open enrollment learning activities: first-come-first-served online registration, approval of advising supervisor if release time is required.
- Selection for mentoring and on-the-job training activities: to be determined on a college-by-college and department-by-department basis, with special emphasis on advisors in levels 1 and 2.
- Registration and tracking for all learning activities: through the UCB Learning Center (LMS)

## **ADVISING PORTAL AND LINKS**

- A central administratively supported Advisor Portal for all advisor related information and tools.
- Links from the portal: (a) to UCB Learning Center (LMS) for registering for courses and tracking, (b) to e-Learn for particular online courses.
- Links into the portal: all departmental units who have staff in student advising roles should include in their staff resources a link to the Advising Portal and the UCB Learning Center.

## **OWNERSHIP/RESPONSIBILITIES/ROLES**

- Sponsorship and funding: the cohort classes, workshops, interactive forums and online learning modules to be sponsored by the Office of the Vice Provost of Teaching and Learning, and centrally funded. Contribution by departments to be in the form of release time for employees.
- An advisor professional development coordinator role. During an initial incubation period of one or more years, this implementation role will include a member of the COrWE staff, reporting to the COrWe Director. Eventually, this role might be taken over by a designated staff member in the office of the Vice Provost of Teaching and Learning.
- Subcommittee 2 of the Advising Task Force:
  - (1) Be the "face" of the program to the campus advising community: advocacy, promotion, recruitment.
  - (2) Ongoing feedback and advice to the Advisor Professional Development Coordinator.
  - (3) Assist with the rollout of the program.
  - (4) Presence at program events to set context and introduce.
  - (5) Participate in program evaluation.

- Advising Directors' Network (under consideration):
  - (1) Support, promote and provide expert input into the ongoing development of the program.
  - (2) Support by encouraging and requiring participation of advisors in the program.
  - (3) Implement mentoring and on-the-job training components of the program in the various colleges and departments.
  - (4) Participate in program evaluation.

## **OUTREACH AND MARKETING (TBD)**

*QUESTIONS FOR DISCUSSION: In what ways should this program be promoted among campus advisors? What could the ATF, especially Subcommittee 2, do to help recruit advisors to the program and promote support for the program among advising supervisors?*

Discussion clarified that a fall 2009 task for Subcommittee 2 would be to aid in the development of an orientation for managers and supervisors. One group to focus an orientation on would be the L&S-SAO Supervisors Group.

## **PROPOSED ROLL-OUT CALENDAR (TBD) *(FOR DISCUSSION)***

Discussion clarified that this should be a fall 2009 task for the ATF Subcommittee 2. The roll-out calendar should include the seven NACADA webinars, which begin in September. The calendar should reflect at the minimum, a 24 month timeline.

## **EVALUATION PROCESS (TBD)**

In order to evaluate organizational outcomes based on the reported competencies and to assist managers with identifying the value of the professional development the program provides to their front-line workers; tracking measurable changes in what participants offer students will be necessary. Outcomes reflect staff's efforts to bring about change for students.

Direct and indirect methods of evaluation should be utilized to fully analyze program content and provide effective feedback on ongoing revisions to the program's components.  
(Attachment 4)

Demographic information related to participants would be aggregate for reporting purposes and would be kept confidential. Participants would be tracked utilizing various quantitative and qualitative methods in order to document learning outcomes at every stage, as well as upon completion. Tracking would also occur at 6 month and 12 month intervals after completion date to capture further data related to professional development outcomes. Lateral employment moves would also be tracked.

A matrix will be developed to capture data related to knowledge and abilities gained, which have been applied across participant's specific advising duties, during the course of the program. Learning portfolios for all participants would also be developed to demonstrate learning outcomes applied across the job families that are represented by participants.

<b>FOUNDATIONAL COMPETENCIES</b>						
<b>Learning and Advising Theory Knowledge</b>						
1	Understand advising philosophy and theoretical frameworks					
2	Understand college student development theory					
3	Ability to apply theory to practice					
<b>Legal and Ethical Issues in Advising</b>						
4	Identify legal and ethical issues in higher education			√		
5	Utilize correct FERPA practices			√		
<b>The Role of the Advisor</b>						
6	Understand mission and goals of advising at UC Berkeley			√		
7	Understand the role of the Advisor					
8	Ability to connect advisor role to the mission and goals of UCB and dept.					
9	Understand issues and trends in higher education			√		
<b>PRACTICE COMPETENCIES</b>						
<b>Cultural Competence</b>						
Understand trends/issues facing diverse students and how to advise						
10	them appropriately			√		√
11	Understand one's own cultural background in relation to others			√		√
<b>Career Advising Knowledge and Skills</b>						
12	Understand academic major and important workplace competencies					
13	Understand campus career resources			√		
Understand graduate, professional and continuing education opportunities						
14	in advisement areas				√	√
<b>Academic Advising</b>						
15	Understand and identify factors that lead to academic difficulty			√		√
16	Understand and apply techniques for advising undeclared students				√	√
17	Understand the role of the graduate student advisor					
<b>INTERPERSONAL COMPETENCIES</b>						
<b>Communication, Interpersonal, Counseling/Referral Skills</b>						
18	Use active listening skills by utilizing probing/open-ended questions			√		
Understand and apply effective communication methods to present						
19	information clearly			√		
Understand and apply methods to establish sensitive and effective						
20	working relationships			√		
<b>INSTITUTIONAL COMPETENCIES</b>						
<b>Understand Cal and UC Systems</b>						
21	Identify UCB student demographics					
		Workshop		Panel	Forums	On-The-Job Mentorship
√				√		√

22 Understand UC and Cal history	✓				✓				✓			
23 Understand current campus issues	✓				✓				✓			
24 Understand the Berkeley shared governance model	✓				✓				✓			
<b>Knowledge of Campus Resources</b>												
Ability to refer students to appropriate campus resources during advising sessions	✓				✓							
<b>Policies and Procedures</b>												
Understand and effectively apply departmental and UCB's policies & procedures	✓				✓				✓			✓
<b>WORK EFFECTIVENESS COMPETENCIES</b>												
<b>Time Management and Organization</b>												
27 efficiently	✓				✓						✓	
28 Understand and apply techniques to perform several tasks at once	✓				✓						✓	
<b>Team work and Collaboration</b>												
29 techniques	✓				✓				✓			
<b>Writing and Computer Skills</b>												
30 Demonstrate proficient business and informational writing style	✓				✓							
31 Apply knowledge of computer applications and web page development					✓							
<b>Teaching/Facilitation Skills</b>												
32 learning					✓							
33 Understand and utilize methods to establish agendas and run efficient r					✓							
<b>Supervisory/Management Skills</b>												
34 Understand and apply ethical/professional/supervisory hiring practises					✓							
35 Understand appropriate methods of supervision to manage student workers					✓							
36 Utilize financial planning methods and formulate or manage budgets					✓							
<b>Personal Assessment and Learning</b>												
37 Assess personal strengths and limitations in student services	✓											
38 Apply methods to independently set and monitor goals, implement projects and assess outcomes	✓				✓							
39 Incorporate suggestions to improve performance	✓											
40 Utilize trends in student services to seek out opportunities and foster professional development	✓								✓			



**2-CLASS SEQUENCE FOR ADVISOR PROFESSIONAL DEVELOPMENT CERTIFICATION  
OR CE CREDITS**Learning Outcome

By the end of this 2-class sequence, advisors will be able to explain learning and advising theory and apply it to their advising sessions, and use best practice skills and techniques to obtain successful results in their advising.

Learning Methods

- Self-assessment of knowledge, skills and abilities (pre- and post-)
- Lectures by class instructor and guest lecturers
- Reading assignments (textbook and articles)
- Homework assignments (reflective papers on how knowledge/skills are being applied)
- Out-of-class group projects supporting the in-class learning
- Attendance at concurrent Information Panels, Interactive Forums and NACADA webinars (5 per semester)
- Class discussions

Class Duration and Time Commitment

- Class sessions: 3 hours each, 5 sessions per semester. (30 hours)
- Readings, homework assignments and group projects: 3 hours between sessions. (30 hours)
- Concurrent learning events: 2 hours between sessions. (20 hours).

Proposed Textbook

*Student Services: A Handbook for the Profession.* By Susan R. Komives and Dudley B. Woodard (Jossey-Bass 2003)

**Class 1: Fundamentals of Student Advising***Session 1: Learning and Advising Theory*

- Philosophies and dynamics of learning
- Differences in learning styles
- Understanding the needs of adult learners
- Philosophy and values of the advising profession
- Different types of student advising

*Session 2: Higher Education/Dynamics of a Campus Environment*

- Issues and trends in higher education
- Organizational structure and culture of a university campus
- Social dynamics of a campus environment
- Understanding the UC system and the UCB campus

*Session 3: Student Development Theory*

- Student psychosocial development
- Student cognitive development
- Student identity development
- Understanding the student experience
- Common challenges that impact student performance
- Key factors supporting student success

*Session 4: Understanding the Role of the Advisor*

- Crucial contribution of advisors to student learning
- Changing role of the advisor in higher education
- Advising as logistical help and orientation
- Advising as teaching and support to student development
- Advising as counseling and referral to professional counseling
- The different roles of staff and faculty advisors
- Role and perceptions/expectations of advisors on the UCB campus

*Session 5: Trends and Issues Facing Diverse Students*

- Range of social and individual diversities on a university campus
- Demographics of CA, UC and the UCB campus
- Multicultural and international diversity – trends and issues
- Special issues/needs of different types/categories of students
- Best practices for working with students of diverse backgrounds

**Class 2: Skills and Techniques for Successful Student Advising***Session 1: Teaching, Counseling & Helping Skills for Advisors*

- Understanding requirements and policies for students
- Understanding the questions students typically bring
- Connecting with and establishing relationships with students
- Conveying empathy and helpfulness
- Showing interest in students as individuals
- Being accessible in multiple ways
- Providing developmental guidance beyond immediate queries
- Sympathetic listening and offering of wise counsel

*Session 2: Communication Strategies for Student Advisors*

- Model for effective communication
- Paying attention and active listening
- Asking the right questions
- Effective presentation of information
- Giving effective feedback
- How to deliver "bad news"
- Sensitive confrontations
- Dealing with resistance
- Conflict resolution

*Session 3: Advising Diverse Student Populations*

- Understanding the specific needs of diverse student groups
- Multicultural and cross-cultural sensitivity skills
- Cross-cultural communication skills
- Working with students with different levels of academic preparation
- Working with under-represented student groups
- Working with international students

*Session 4: Working with Students in Difficulty or Distress*

- Helping students in academic difficulty
- Advising students in financial difficulty
- Supporting students in emotional/personal crisis
- Dealing with resistant or problem students
- Knowing when to refer to psychological counseling
- Resources for on-campus referral

*Session 5: Case Studies in Working with Specific Student Issues*

- Advising the undeclared student
- Advising graduate students
- Helping students with career decisions
- Working with issues of student conduct
- Advising students who want to study abroad

<b>E-Learn Classes/On-Line Modules</b>	<b>INTERPERSONAL</b>	Communication	Counseling/Referral Skills	<b>PRACTICE</b>	Cultural	<b>WORK EFFECTIVENESS</b>	Time Management and Organization	Team Work and Collaboration	Writing Skills	Computer Skills	Teaching and Facilitation Skills	Supervisory and Management Skills	Personal Assessment and Learning
Workplace Communication Skills		√											
Listening Basics		√	√										
Listening for Higher Purposes		√	√										
Communicating to Get Results		√	√										
Overview to Effective Business Communication		√											
Advanced Business Communication		√											
The Art of Global communication		√			√								
Improving Your Cross-cultural Communications		√			√								
The Impact of Culture on Communication		√			√								
Effective Intercultural Relationships		√			√								
Interpersonal Communications: The Process		√	√					√					
Communication Skills to Fast-track Your Career		√											√
Communicating with Power and Confidence		√											
Conquering Conflict through Communication		√	√					√					
Handling Conflict		√						√					√
Managing Your Anger		√											√
The Path to Peace and Harmony		√											√
Effective Telephone Techniques		√											
Making Telephone Calls Count		√											
Overcoming Difficult Service Situations		√	√										
Time Management							√						
Your Time and You							√						
Techniques for Improved Time Management							√						
Developing Excellent time Management Habits							√						
Conflict, Stress, and Time Management							√						
Effective Interfunctional Relationships								√					
Difficult People in the Workplace Environment		√						√					√
Effectively Communicating in Teams								√					
Communicating for contacts								√					
Making Cross-generational Teams Work								√					
Project Management Overview													√
Managing Projects within Organizations													√
Project Life Cycles and Stakeholders													√

<b>E-Learn Classes/On-Line Modules</b>	<b>INTERPERSONAL</b>	Communication	Counseling/Referral Skills	<b>PRACTICE</b>	Cultural	<b>WORK EFFECTIVENESS</b>	Time Management and Organization	Team Work and Collaboration	Writing Skills	Computer Skills	Teaching and Facilitation Skills	Supervisory and Management Skills	Personal Assessment and Learning
Executing, Monitoring & Controlling, and Closing a Project													✓
Program Planning													✓
Managing as Project Champion													✓
Facilitative Fundamentals: Techniques and Tools											✓		
Facilitative Formats and Tools: Offering Options											✓		
Presenting Successfully											✓		
Available Presentation resources											✓		
Group Problem Solving and Decision Making								✓			✓		
Gaining Allies, Creating Change								✓			✓		
Analyzing Workplace War Zones								✓			✓		
Leadership Communication Skills		✓										✓	
Facilitating Effective Hiring												✓	
An Essential Guide to Giving Feedback		✓										✓	
Managerial Skills and Abilities												✓	
Becoming a Manager: Responsibilities and Fears												✓	
Organizational Ethics												✓	
Understanding Organizational Ethics												✓	
Hiring Temporary (Contingent) Employees												✓	
EEO and Affirmative Action												✓	
Screening Applicants												✓	
Coaching Performance												✓	
Problem Performance Improvement												✓	
Management of Cash Flows												✓	
The Principles of Financial Management												✓	
Effective Budget Management												✓	
Budgeting and Controlling Costs												✓	
Writing with Intention									✓				
Writing to Reach the Audience									✓				
Understanding Writing Mechanics									✓				
Crisp Composition									✓				
Punctuating with Skill									✓				
Avoiding Grammatical Errors in Business Writing									✓				
Advanced Business Writing for Results									✓				
Effective Business Communication									✓				

<b>E-Learn Classes/On-Line Modules</b>	<b>INTERPERSONAL</b>	Communication	Counseling/Referral Skills	<b>PRACTICE</b>	Cultural	<b>WORK EFFECTIVENESS</b>	Time Management and Organization	Team Work and Collaboration	Writing Skills	Computer Skills	Teaching and Facilitation Skills	Supervisory and Management Skills	Personal Assessment and Learning
Getting the Most from Business Documents									√				
Intro to Computers and Microsoft Windows Vista										√			
Using Effective Remote Communication		√								√			
Essentials of Electronic Communication		√								√			
E-mail and Organizational communication		√								√			
Optimizing E-mail at Work										√			
NetMeeting								√		√	√		
Working with Laptops and Portable Devices										√			
Creating custom Slide Shows in PowerPoint 2007										√			
e-Business Part 5: Understanding the Applications										√			
e-Business Part 6: Working with Employees										√			
Executing Projects with Project Server 2007										√			√
Basic Troubleshooting										√			
Cisco CIPT1 6.0: Implementing Media Resources										√			
Growing with Technology-Level 4										√			
ICDL Module 2: Using the Computer and Managing Files										√			
Behavior: Putting Your Best Foot Forward													√
Putting Knowledge to Work													√
Being Prepared for Change													√
Working with Negative People and Procrastinators		√											√

PROCESS OF PERFORMANCE MEASUREMENT

