Response to Information Request - Academic and Career Advising Redesign Implementation

Phase 1 Implementation Milestones

- Develop position descriptions for advising support roles in the Advising Hub

1. What duties in the advising support roles will be transferred from advisor positions?

Advising support roles are under development, and as we construct these positions, we expect no transfer of duties from advisor positions to advising support roles.

Phase 2 Implementation Milestones

- *Develop processes for assigning advisors and subgroups in consultation with Pathway Advising Directors and departments*
- *Implement Pathway Advising Director supervision and change in reporting lines*

2. How will reporting relationships and oversight functions be changed for current advisors?

Prior to the beginning of implementation of Academic and Career Advising Redesign Recommendations, advisors had inconsistent reporting relationships across schools and colleges. For example, in the School of Business, advisors reported to a full-time Director, and in the College of the Arts, advisors functionally reported to the Associate Dean and technically reported to the Dean.

In moving to a coordinated and unified advising system, which includes the Pathway Advising model and hiring of Pathway Advising Directors, all academic professional advisors will report to a Pathway Advising Director, and Pathway Advising Directors will report to the Associate Vice Provost for Advising and Career Services. One purpose in moving to this model of oversight is to provide *all* advisors with consistent and meaningful support from their direct supervisor.

3. Are there any advisors who will not experience a change in reporting to Pathway Advising Directors?

Yes, there are a small number of advisors with particularly unique responsibilities that will not experience a change in reporting to Pathway Advising Directors. For example, the Criminology and Criminal Justice Department in the College of Urban and Public Affairs has a fully online degree program. The nature of the duties and responsibilities of the online CCJ advisor are so unique as to make it most fitting for the position to continue reporting within the current structure. Per the agreement made with the department, the online CCJ advisor will participate in Pathway Advising team activities as appropriate.

4. Will advisors be moved physically to accommodate these new structures?

The best practice for an advising team is to ensure that team members have easy access to one another and their supervisor. To accommodate the new Pathway Advising model, it is possible that advisors will move physical locations, but it is not known at this time who would move or when this would happen. It is worthwhile to note that some advisor physical office locations will change after the Neuberger Hall renovation is complete (see responses to questions 14-16).

5. How will advisors embedded in unit's interface with departmental leaders?

This will depend on the particular academic department. For instance, in English in the College of Liberal Arts & Sciences (CLAS), the embedded advisor has participated in departmental meetings with faculty and is a valued contributor. This advisor will retain those duties and responsibilities in support of students majoring in English, and the Office of Academic Affairs is collaborating with CLAS to document these duties and responsibilities in an MOU.

In other departments, embedded advisors have participated differently. The duties and responsibilities advisors have fulfilled that support advising and student success efforts in those departments/schools and colleges can likely continue and be documented in the MOU under development for each school/college. It is expected that while most departmental advisors will not be supervised by departments, they will continue to interact with departmental leadership in performance of their job duties and responsibilities.

6. What will happen to the work advisors in departments currently perform for the department? Will advisors retain that work?

Provided that the work is consistent with the duties and responsibilities outlined in advisor position descriptions, the work can continue and be documented in the MOU under development for each school/college.

7. If advisors will not retain that work, will central advising seek to demote all advisors from AC 2 to AC 1 who are no longer performing AC 2 work for the departments?

No. We do not have a plan to demote any currently employed advisor from an AC 2 to an AC 1 position as a result of the Academic and Career Advising Redesign implementation process.

8. Is there a plan to train all these new Pathway Directors in how to manage the transition; how to supervise and evaluate employees, and all other lowest level manager skills?

Yes, Pathway Advising Directors will start in their new roles in the late spring/early summer. Training will be approached in a number of different ways, which include but are not limited to: (1) Training and support on lowest level manager skills and the employee evaluation process through PSU HR resources and support from the AVP for Advising and Career Services, (2) Full-day retreat to engage in meaningful learning opportunities about leadership and management of former peers, as well as to develop plans for supporting advisors in this change process, and (3) Resources external to PSU as needed.

9. Will there be consistent standards of evaluation for all advisors across all Pathways? If so, how will consistency be maintained?

Currently (prior to Academic and Career Advising Redesign), supervisors of advisors use the evaluation process and forms provided on the HR website. While there is consistency in the basic process and forms used, it is my understanding that at this time there is wide variation in how evaluations are conducted and feedback is provided to advisors.

To have a meaningful evaluation process for advisors, it will be important that Pathway Advising Directors engage in a similar process across Pathways. However, there should also be room for Pathway Advising Directors and advisors on particular Pathway teams to acknowledge unique aspects of each Pathway in their evaluation process.

Consistency in approach will rely on the HR practices in place for all academic professionals, collaboration between Pathway Advising Directors, communication with all advisors, as well as support from the AVP for Advising and Career Services.

- *Revise advisor position descriptions to be consistent with common practices and required student milestones*

10. How will performance expectations of advisors change with the revision of job descriptions? What are the new performance expectations?

As part of performance expectations, advisors will have the opportunity to engage in the Common Practices outlined in the Academic and Career Advising Redesign Report. Many advisors have been engaged in many of these practices, and by making these practices "common" in the PSU professional advising community, we can best ensure consistency in our student success and degree completion efforts.

Revision of job descriptions will be minimal and include common practices and student advising milestones (see question 13 for information on student advising milestones).

11. What training will be conducted for advisors and supervisors to support these expectations?

As we move forward with Academic and Career Advising Redesign implementation, advisors will have the opportunity to attend training workshops on common practices and student advising milestones (likely to take place fall 2017). The purpose of these workshops will be to provide advisors with the process, content, and toolkits they need to be successful. There will be multiple training workshop opportunities, and advisors will be supported beyond the initial workshop as they request it.

12. What is the transition period for the new expectations? When will the new expectations begin to be evaluated?

The transition period for the new expectations (common practices and student advising milestones) will begin at the end of summer 2017 and go through the end of fall 2017. We will be functioning from our new Pathway Advising model by January 2018.

New expectations (common practices and student advising milestones) will be a part of advising community shared practice by January 2018, and so comments about them could be included in 2018 performance evaluations.

13. Will advisors be expected to be accountable for students reaching required milestones?

All five of the student advising milestones are process oriented and focused on conversations taking place between advisors and their assigned advisees. Advisors will be expected to make diligent attempts to engage in these milestone appointments/conversations with their advisees, but advisors will not be held to particular student actions based on those conversations.

- *Articulate design for career counselor/career center in the Hub*

14. How does administration contemplate the physical space for the advising function will change?

Until the Neuberger Hall renovation is complete (projected completion date is September 2019), we will be working with the space we have as we engage in the Academic and Career Advising Redesign implementation process.

VP Jhaj and AVP Harcleroad believe that advisors require private space for advising conversations with students. Vice Provost Jhaj has made an ongoing effort to advocate for high-quality office space for Advising and Career Services and AVP Harcleroad has participated in two conversations on space with the Neuberger Hall building design team. We are delighted that the current plan for Neuberger Hall has significant space for the advising and career services function.

The new space in Neuberger Hall will house career services staff (career services leadership, career counselors, and employer relations team members), as well as provide space for advisors, advising support roles, and the AVP for Advising and Career Services. At this time, it is our understanding that in addition to the new space in Neuberger Hall, advising and career services will retain the current space it has in PSU schools/colleges.

15. Will advisors continue to have their own offices?

See #14. It is the current goal to retain individual office space for each advisor position at PSU, and the Neuberger Hall renovation plans include individual office spaces for advisors.

16. Please share the current draft of the design and architectural plan for the advisor space to be housed on the 3rd floor of Neuberger Hall.

The architectural firm working with PSU is *Hacker Architects,* and they are currently in the process of incorporating feedback received during our last review session in March 2017. Examples of the feedback provided include the request for designated break room space in the advising and career services suite, and the request to maintain private offices for all advisors and career counselors. AVP Harcleroad requested an electronic copy of the current plan for the third floor of Neuberger Hall, and this plan has been included with the response as an attachment.

- *Develop a comprehensive training plan for new and existing advisors on new advising structure, majors…and common practices*
- *Develop changes to electronic systems in order to support advisor assignments and student-facing appointment scheduling*

17. Will advisors be expected to make their calendar's available to students for direct scheduling? Will they be able to block time slots as they deem appropriate, and current with past practice, to take care of other aspects of their position?

Yes, consistent with current practice, advisors will be expected to make their calendars available to students for direct scheduling. Current appointment scheduling practices are varied across the advising community, and within advising units in some cases. For instance, some advising units use YouCanBookMe, and in this way, students already have access to making appointments directly with advisors. In some advising units, a combination of scheduling practices are in place to support the needs of advisors and students. For example, advisors use YouCanBookMe, but students can also call a front desk or send an email to a specific advisor to schedule an appointment.

To make scheduling more consistent for students, a scheduling tool that the entire advising and career services community can use would be helpful, and it should provide a way for students to make appointments directly (especially since this is consistent with current practice and is an aspect of meaningful service to PSU students). While a common scheduling tool can help both advisors and students, it is anticipated that advisors will need to block time on their calendars to complete other aspects of their position responsibilities. As is the case currently, advisors can set their schedules for appointments in consultation with their supervisor.

18. Will advisor notes about advising appointments and students be made public as part of any new software?

No, advisor notes about advising appointments and students will not be made public.

The current database and note-taking system in place at PSU is the Education Advisory Board's Student Success Collaborative Campus (EAB SSC Campus). Due the fact that students often work with more than one person on campus, it is helpful for advisors to see the contact notes other advisors have taken regarding student appointments. For example, it is useful for advisors to know what courses a student has been advised to take the following term.

While sharing notes within the advising community is helpful to support our work with students and our work with each other, contact notes are part of a student's record and protected under FERPA. For this reason these notes can not be made public, and the only individuals who should have access are those who have a "need to know" in order to support a student's progress at PSU.

19. What aspects of advisor performance will be measured by the advising analytics software?

The analytics capabilities in EAB SSC Campus are used to help identify students in need of outreach, support, advising, etc., and they are not currently used to measure advisor performance. While there has been no discussion about the use of this platform to measure advisor performance, the advising platform does record interactions between advisors and students.

Through the redesign process, the only changes to our approach to advisor performance are in relationship to the consistent engagement of the common practices and student advising milestones (see response to question 10) by all PSU advisors.

Phase 3 Implementation Milestones

- *Establish a plan to implement faculty advising in each Pathway*

20. Will faculty be expected to add advising to their current duties? If so, is the plan for release time to be provided?

The Academic and Career Advising Redesign Report includes recommendations on the establishment and clarification of advising roles. These roles include *assigned advisor, career counselors, faculty advising, exploratory advising, Pathway Advising Director, advising support, and transfer advisor roles.* (The effort to establish and clarify advising roles was done in response to feedback received from both professional and faculty advisors.)

Of these roles, the two that are most applicable to faculty are *assigned advisor* and *faculty advising.* (For more information on the details of the *assigned advisor* role and *faculty advising*, please see page 18 of the Academic and Career Advising Redesign Report.) Faculty can serve in the *assigned advisor* role, but in order to do so, they must have FTE dedicated to advising students. Faculty members can choose to serve in the *assigned advisor* role based on their

interests and the needs of their department, and in each Pathway this will be determined with each individual department.

It is our understanding that faculty currently advise students but practices and intensity vary across campus. While not all faculty members will serve in an "assigned advisor" role, the report recommendations suggest that all students should receive faculty advising in their junior and senior year for the purpose of receiving mentorship in the field, deepening their connection to the major, participating in career discussions, exploring graduate school options, etc. In many departments, these faculty advising activities are already taking place. Our goal is to clarify advising practices at the departmental level to support continued engagement of faculty in advising and to facilitate these kinds of faculty-student interactions more consistently across Pathways and academic departments. It's possible that some faculty will serve in an *assigned advisor* role, as they currently do, and in this case, FTE should be devoted to these activities.

21. What does the addition of faculty advising mean regarding the continued use of advisors in those areas?

The Academic and Career Advising Redesign Report recommendations did not include the *addition* of faculty advising to advising work at PSU. Rather, the report recommendations sought to provide clarity in roles for a student's *assigned advisor* and the importance of *faculty advising* in the junior and senior years. In many cases, faculty members are currently participating in the advising activities outlined for *faculty advising.* The redesign report sought to bring consistency to this work. Professional Academic and Career Advisors will continue to be utilized in the same ways they have been. For example, in the School of Business, professional advisors will serve as the *assigned advisor* for all students, and faculty members will continue to provide students with the mentorship and engagement opportunities already available.

22. If faculty advising is intended to complement and be supportive and not competitive, how will faculty members and advisors in these roles interface with each other?

The ways in which *faculty advising* is defined in the Academic and Career Advising Redesign Report suggest it is indeed intended to complement and be supportive rather than competitive with the work of professional advisors. The ways in which these roles will interface with each other will be dependent on the needs of each school and college, as well as the unique needs of academic departments. (See question 21 for a School of Business example.)

23. Are there plans, or possibility of plans, where advisors would be completely supplanted by faculty members?

We are not aware of plans where professional advisors would be completely supplanted by faculty members.

- *Establish assessment plan to determine impact of redesigned system on student success*

24. Will any aspect of the assessment plan include the assessment of advisor performance?

Assessment of the advising model is a distinct practice from formal performance evaluation of advisors. We will engage in ongoing assessment of advising practices, including soliciting feedback from students, in order to improve our practices and to assess whether the redesigned system is meeting student need and improving student success outcomes in the aggregate.

We also want to ensure that professional advisor evaluations are consistent and objective and that advisors have the opportunity to receive formative and summative assessment of their work. Performance evaluations will follow protocols already in place through the CBA.

25. Will this include student's providing evaluations of advisors? If so, will this include customer service type survey from each time a student interacts with an advisor?

Yes, we intend to solicit student feedback on meaningful interaction with advisors. The feedback can be solicited in a variety of ways (*virtual, email, phone, and in-person methods*). Providing advisors with feedback that allows them to improve their advising interactions with students is important to the success of advisors and the students they serve. Some colleges already have these practices in place.

- *Develop and implement reports for evaluating student use of…advisor contact with students via virtual, email, phone, and in-person methods*

26. Will there be accountability expectations of advisors that fall out of this reporting?

It is incredibly important in a resource constrained environment that we ensure students are using advising resources and working with advisors to the fullest extent that time and position duties and responsibilities allow. At a system and Pathway level, through the establishment of reports evaluating student usage of resources and contact with advisors, we will be able to determine if students are using their resources to the fullest extent possible.

27. Will any aspect of these reports be used to evaluate or potentially sanction advisors?

Yes, we intend to use student feedback as one of the elements in advisor performance evaluations.

Information requested not specifically related to milestones

28. How will the redesign implementation plan be evaluated after rollout? How frequently?

As a component of the implementation plan (see Phase 3 milestones to be implemented October 1, 2017 - December 31, 2017), we will be developing an assessment plan. Our initial thinking about that plan is relayed in questions 24-27 of this document, and we will determine methods and frequency of evaluation for ongoing system improvement in a more comprehensive form by December 31, 2017. At this time, we envision an annual assessment process.

29. Does administration contemplate they will want the evaluation process for advisors to change from what is currently in the CBA?

At this time, we do not contemplate changing the evaluation process for advisors from what is currently in the CBA.

30. As part of the redesign, will someone be tracking the movements of students annual into/out of majors and departments?

Yes, we will study student movement out of majors/departments/Pathways in order to ensure that Pathways have the advising support they need to successfully support students. Students will be coded by Pathway and by major so that reports can easily be pulled tracking student movement through academic programs.

31. Does administration continue to see 2 levels of advisor position? Will the hierarchical nature of the two positions be maintained?

The answers to these questions are dependent upon the current Job Family and Compensation Study analysis underway and overseen by the Academic Professional Advisory Committee (APAC) in consultation with Sibson Consulting. Please see Page 16 of the Academic and Career Advising Redesign Report for more information about the improvement of advisor experience.

32. A lot was said during focus groups about promotional pathways for advisors, long term job security, and work as a source of joy, but note of that is in the implementation plan. Have these matters, which advisors feel are most important, been dropped out of the plan? If not, where do they fit in the implementation plan?

The goal of improving the advisor experience remains paramount and imbedded in all aspects of the redesign implementation process, and VP Jhaj and AVP Harcleroad remain personally committed to this goal. The very recommendations in the redesign report were built on direct feedback from advisors and faculty members, and the subsequent implementation Phases and Milestones document is a breakdown of many (but not all) of those recommendations into attainable goals within a reasonable timeframe for completion of the work. (For more information on the recommendations for improving the advisor experience, please page 16 of the Academic and Career Advising Redesign Report.)

In order to specifically call out the work on promotional pathways for advisors, as well as other ways in which the recommendations aim to improve advisor experience, into a task completion format, VP Jhaj, AVP Harcleroad, and the members of the Academic and Career Advising Redesign Work Group, thought it necessary to utilize the work of the Academic Professional Advisory Committee and Sibson Consulting on the Job Family and Compensation Study. According to the website, Phase 2 of this work is scheduled to be completed sometime during the 2017-18 academic year, and we look forward to the study's completion. To acknowledge this, improving the advisor experience could be listed in the *Ongoing Projects* section of the Phases & Milestones document, and in any future iterations of this document, it can be added.

Redesign implementation will be ongoing after the initial implementation steps have been completed (as outlined in the Phases & Milestones implementation document), and we will pick up and move forward with specific aspects of promotional pathways for advisors when APAC and Sibson have completed their work.

33. What professional development does administration feel is relevant for advisors in the new redesign about advisors learning about "common practices" that are not currently performed by advisors at PSU?

Of the 16 common practices outlined on Page 23 of the Academic and Career Advising Redesign Report (practices 1-15), 15 of them are currently practiced by some, if not all professional advisors, at PSU. By identifying them as "common practices," and conveying that all advisors should participate in them, we give consistency to our advising work. Additionally, and importantly, students have the opportunity for a more seamless experience at PSU if professional advisors are engaged in a set of common practices. In the redesign report, practice 16 is newer to advisors, although many of the advising activities that accompany the five student advising milestones have also been in practice by many PSU professional advisors.

Training/education on the common practices and five advising milestones will be conducted in a workshop format in the fall, and there will be multiple workshops to choose from. There are five work groups for the five student advising milestones chaired by AAUP represented members of the Academic Advising Council, and in their work groups, they are further defining the purpose of each milestone, developing resource lists, checklists, and other aspects important to advisor and student success.