The AACSS Handbook is intended for members of NACADA’s Academic Advising Consultants and Speakers Service. Its purpose is to provide in one place information about the ins and outs, dos and don’ts of the consultants’ and speakers’ roles and responsibilities. Ultimately, it the intention of this Handbook to prepare members to serve as representatives of the Association to the global advising community in particular and higher education in general.

It is the responsibility of every AACSS member to be familiar with the four documents that fundamentally define our work:

- Core Values of Academic Advising
  http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Core-values-of-academic-advising.aspx
- CAS Standards for Academic Advising
  http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/CAS-Advising-Standards.aspx
- Concept of Academic Advising
- NACADA’s vision, mission, and strategic goals
**Components of an Advising Program:** Used as a guide for a program review and evaluation process and as the framework for the information that follows.

**Definitions:**

**Vision:** The aspirations of what academic advising can be.

**Mission Statement:** The statement which reflects the purpose of academic advising and serves as the institution’s roadmap to reach its vision and affirm its values for academic advising.

**Goals:** The long-range expressions of the desired future for academic advising.

**Student Learning Outcomes:** A series of statements that articulate what students are expected to KNOW (Cognitive), DO (Behavioral), and VALUE (Affective learning) as a result of their academic advising experience.
**Process Outcomes**: A series of statements that articulate the expectations for how advising is delivered and what information should be delivered through the experience.

**Advising Policies**: The institutional guidelines and rules that support the advising goals and outcomes.

**Organization/Delivery**: The institutional delivery model for academic advising that is clear, easily communicated to all stakeholders, and reflects the advising goals and outcomes.

**Roles/Responsibilities**: A clear statement of the roles and responsibilities for all involved in the academic advising process, e.g. Administrative leadership, faculty advisors, staff advisors, students, IT representatives, registrar, etc. who reflect and reinforce the goals and outcomes.

**Advisor Development/Tools**: An intentional, institutional plan that provides advisors and students with the knowledge and skills needed to satisfy both the learning and process outcomes and how to fully use the tools available for the support of advising.

**Technology**: The IT systems used to support the organization and delivery of advising (degree audit, on-line appointments and advisor notes, automated communications, student tracking, cohort data base and reporting).

**Program and Advisor Assessment**: The process through which the institution gathers evidence about the claims it is making with regard to student learning and the process/delivery of academic advising in order to inform and support improvement (Campbell, S. 2008).

**NACADA Consultants Preparation Materials and Procedures**
The following information also is provided to requesting institutions on the AACSS website.

(Materials are preferred approximately three to four weeks prior to campus visit)

1. **Charge to Consultants**:

   - What is the specific charge from the host institution? What are the specific academic advising areas being reviewed (one department, one college, entire institution, multiple campus locations, etc.)?
   - What are the specific areas of concern or areas of interest the institution specifically wants the consultants to address?
   - Is the institution interested in possible reorganization or restructuring, or do recommendations need to be made within current organizational structures?
   - What are specific areas/topics the institution wants the consultants to address while on campus and in the final written report?
2. Description of the Academic Advising Process and Organization in the Institution:

This information could include but is not limited to:

- Organizational structure of the institution and where academic advising fits into this structure.
- Which individual or office is ultimately responsible for the academic advising program institution-wide?
- Who establishes academic advising policies and procedures?
  - Faculty Senate or body
  - Individual colleges/departments
  - Central administration
  - Other
- Who provides academic advising?
  - Faculty
  - Professional Advisors/staff
  - Peer/Graduate Student advisors
  - Other
- How many academic advisors are there in any of the advisor types immediately above? Have the numbers of these types of advisors shifted in recent years?
- What are academic advisor/advisee ratios at the institution or in each unit?
- Organization of the advising centers and offices-- staff, administration, duties, etc.
- Advising process during the undergraduate experiences -- including those who begin as first-year students, transfer students, and certificate students
- Responsibilities of advisees -- have these been clearly established, articulated, and distributed to all students as well as to all constituencies in the college, i.e., administration, faculty, and staff? If so, please describe.
- Responsibilities of advisors -- have these been clearly established, articulated, and distributed to all students as well as to all constituencies in the college, i.e., administration, faculty, and staff? If so, please describe.
- How is technology engaged to support the academic advising process, including by advisors and for students?

3. Professional Development for Advising Staff:

Description of professional development activities provided for the staff -- including training and on-going development opportunities. This description would include any in-house professional development as well as professional development opportunities outside the institution.
4. Assessment:

Description of assessment process as well as any results and how those results have been used for improvements. This information should include:

- Academic Advising Mission, Vision, and Goal Statements – Do they currently exist?
- Mission, Vision, and Goal statements for the Academic Advising Centers themselves that reflect the institution's mission, vision, and goals
- Expected outcomes for the advisors
- Expected student learning outcomes for the advisees
- Measurements employed for goals and outcomes -- where measured, how measured, and when measured?
- Performance evaluation/assessment process for advisors and advising administrators
- Examples of any measurement used - both direct and indirect

5. Additional Items to Consider:

- Advising position descriptions
- Evidence of faculty role in advising: Faculty Handbook? Tenure and Promotion criteria for advising? Advising placed within the teaching mission of the institution?
- University, college and/or departmental advising policies
- Is there an institution-wide advising initiative, e.g. Advising Council? --Is advising centralized across the institution or decentralized in smaller units?
- Is there an institution-wide strategic plan? A strategic plan for smaller units?
- Are the institution’s and units’ mission statements accessible on the web?
- Institutional support for advising programs – e.g. space, operating budget, etc. – who makes budget decisions for advising?
- Will a final wrap-up meeting be needed? Does the institution choose to hear initial consultant comments and recommendations at the end of the visit prior to leaving campus, or will these comments be provided only = in a final written report?

6. Stakeholders the Consultants Will Want to Interview:

- Students (student leaders, student employees, general students who receive academic advising in areas being reviewed)
- Institution administrators invested in academic advising processes, procedures, oversight, etc. (from specific unit administrators to central administrators who have a stake in the outcomes of the consultant review)
- Campus units and non-advising entities who are impacted directly by the academic advising programs
- Academic advisors representing all areas being reviewed
- Advising support staff – individuals who have direct contact with students in person, on the phones, etc.
- College/department administration, chairs, faculty, etc. who have a stake in the outcome of the consultant review
• Technology support staff – those who create, maintain, and operate technology resources connected to academic advising processes and procedures

7. Sample Consultant Visit Schedule

AGENDA: DAY 1

9:00am – 10:00am:
• Meeting with Academic Advising Task Force (AATF)
• Members College of Arts & Sciences Faculty
• College of Business Faculty
• College of Education & Health Sciences Faculty
• Professional Staff Advisors
• Student Members

10:00am-10:30am
• Break

10:30am – 11:30am
• Meeting with College of Arts & Sciences Dean
• Chairs
• Other Faculty from the College of Arts & Sciences

11:30am – 12:30pm
• Meeting with College of Business Dean:
• Chairs
• Professional Staff Advisors
• Other Faculty from the College of Business

12:30pm – 1:30pm
• Lunch Meeting with Professional Advising Staff (on-campus students)

1:30pm-2:00pm
• Break

2:00pm – 3:00pm
• Meeting with College of Education & Health Sciences Co-Interim Deans
• Chairs
• Other Faculty from the College of Education & Health Sciences

3:00pm – 4:00pm
• Student Meeting

4:00pm – 4:30pm
• University President & Vice President for Academic Affairs
AGENDA: DAY 2

8:45am - 9:30am
• Meeting with Advisors for Online and Distance Degree Students Online
• Dual Credit

9:30am – 10:15am
• Meeting with Financial Aid, Registrar & Institutional Research

10:15am – 11:00am
• Meeting with Admissions, Center for Engaged Teaching & Learning (First-Year Experience Learning Communities), Student Success Center (Orientation & Career Services)

11:00am - 11:15am
• Break

11:15am - 12:00pm
• Campus Tour

12:00pm – 12:15pm
• Break

12:15pm – 1:30pm
• Lunch with Students

1:30pm – 2:30pm
• Meeting with Athletics, Office of International Programs, Honors Program, Native American Center & Veterans Center

2:30pm - 3:30pm
• Exit Interview: Academic Advising Task Force, Vice President Academic Affairs & University President

8. Consultant Requests:

• Meals may be working meals (meeting with individuals during meals is appropriate if needed)
• If consultants will be meeting with various individuals at different locations, please plan appropriate travel time. If possible, it helps to have someone walking consultants to different meetings since consultants are not familiar with campus
• Restroom breaks are appreciated
• Ability to connect to campus internet on laptops, etc. would be appreciated
Practical Tips and Advice for NACADA Consultants

Consultants will benefit from reviewing these tips prior to each campus visit.

1. **Team vs individual consultant visits:**

   The primary difference between an individual conducting a program review and a team will, of course, be the necessity of one person conducting all phases of the review. More breaks should be scheduled when a consultant is working alone, and not all meals should be work related. (We would like to suggest no more than one working meal per day if possible.) Conducting a program review alone will be more taxing and require more overall stamina. Team reviews allow the consultants to collaborate with each other and take turns facilitating meetings, taking notes, etc.

   Whether reviewing alone or as part of a team, consultants must maintain the highest degree of professionalism as a representative of NACADA.

2. **Preparing questions for campus meetings:**

   Consultants should have questions for meeting participants prepared ahead of time to initiate conversation. These questions will ultimately depend upon the purpose of the consultation (e.g., program review, development of assessment process, professional development).

   For example, some common, general, questions for a program review might include:

   - What about the advising program and advising activities at institution do you believe are going well, or are you most proud of?
   - What areas do they see need for improvement/gaps they perceive exist?
   - What are the more critical student issues that advisors could assist with?
   - How might your office or service improve outreach to students? How do students know about what you provide?
   - What strategies might academic advisors use to enhance their involvement with students? How do you get students connected to advisors?
   - What is the general perception of how Academic Advisors fulfill a role at institution?
   - How does your institution address exploratory/undecided students? Other special populations?
   - What opportunities exist for advisor training and professional development at your institution?

3. **How to facilitate campus meetings:**

   Consultants should be prepared to facilitate meetings during campus consulting visits. They are the key individuals managing the meeting format and structure to elicit appropriate feedback. Tips to consider are:

   - Don’t assume that individuals attending meetings know why you are there, or why they are there. Consultants should give a brief overview of the purpose of the
meeting (based on information received from institution prior to visit) and the role of consultants as representatives of NACADA.

- If meeting groups are small (10 or fewer people) then quick introductions of all meeting attendees is recommended, allowing them to tell consultants their roles on campus. If the groups are much larger it may take too long for introductions.

4. Note taking strategies:

Consultants should be prepared to take excellent notes throughout the campus visit. If the program review is being conducted by a team, a best practice is to have one person facilitate the meetings while another person takes notes.

One strategy to consider is using the meeting schedule to write in possible questions for each group and space for notes on the responses.

Notes should be shared among consultants during and after the campus visit rather than with the institution. The notes will be critical to make sure key issues are addressed in a final report.

5. Report Templates – NACADA’s common language:

Typical **program review** reports should include the following sections:

- Introduction: (Overview/summary statement of the campus visit, what meetings occurred, etc.)
- Common assumptions about academic advising: advising as teaching and learning, references to key NACADA documents such as Concept of Advising, NACADA Core Values, and CAS Standards. (Remember to brush up on these documents before the campus visit.)
- Observations:
  - Strengths of advising program and campus
  - Challenges/concerns of advising program and campus
- Recommendations: Consultants should review the institution’s specific charge for ideas on how to organize recommendations
- Summary
- Campus Visit Itinerary (appendix)
Regarding travel arrangements, reimbursements, and reports

Travel arrangements-
- Travel arrangements should not be booked until after the Consultant Agreement Form/Institution contract is signed by all parties—unless special circumstances apply and the institution has given permission for the flight to be purchased.
- Consultants will be the primary coordinator of their travel arrangements. In many cases, the institution is willing to book all travel arrangements for consultants. If the institution books any travel arrangements, the consultant will supply them with a screen shot or link to the flight/arrangements they would prefer for the event.

Flights-
- Coach airfare will be covered. Additional charges, such as main cabin or preferred seats and flight cancellation insurance, will not be reimbursed.
- If flight changes are made for personal reasons, institutions will not be billed or expected to reimburse these change fees or extra fare costs.
- Notify AACSS Liaison (Cathy Swartz) of any date changes or trip cancellations ASAP.

Meals-
- There is currently no limitation on meal allowance. Please be considerate of the institution’s financial budget when dining out, especially for dinner.
- Please submit the original itemized receipt for all meals. Some institutions require copies of the consultant’s itemized receipts be included with the invoice.
- No alcoholic beverages on receipts for reimbursement. If you choose to have an alcoholic beverage on a consulting trip, please ask waiter to put on a separate receipt.

Rental Car-
- When driving a rental car, you are covered under your personal auto insurance policy for accidents. Please be sure to check with your insurance agent prior to booking your rental car.
- Additional collision coverage added to the rental will not be reimbursed. You will be responsible for these charges.
- If conducting a review with an additional consultant(s), please try to coordinate the use of only one rental car. Sometimes due to circumstances, this arrangement will not work and multiple rental cars will be needed. We ask for your assistance to check with one another prior to booking separate rental cars.
Reimbursement-

- Consultants need to complete an AACSS Reimbursement Form for every visit.
- The completed and signed reimbursement form along with scanned copies of receipts are to be sent to Cathy Swartz, swartz@ksu.edu
- All receipts the consultant would like reimbursed need to be submitted using the AACSS Reimbursement Form to the EO Liaison within one week of the conclusion of the consulting trip via email or fax to ensure prompt invoicing/payment. Please submit the original itemized receipt for all meals. Some institutions require copies of the consultant’s itemized receipts be included with the invoice. The original receipts should also be saved in the event the institution requires them for payment processing.
- Consult your tax or financial advisor regarding any tax implications (international or domestic). NACADA will issue form 1099 by January 31 each year.

Audit Reports-

- A copy of the audit report must be submitted to the AACSS Liaison (Cathy Swartz) at nacada-acss@ksu.edu for every audit that takes place.

Resumes-

- Consultants will submit an updated resume to the EO Liaison in January of each year using the AACSS Resume Template. The EO Liaison does, however, accept updated resumes throughout the year and especially encourages new consultants to update after completing their first several AACSS events.

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