Promotion Structure for Professional Academic Advisors

Indiana University Bloomington

Rationale

Quality academic advising is fundamental to providing students with a quality education and plays a critical role in student success and graduation. "Academic advising is an integral part of the educational process…. 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 seek to understand and modify barriers to student progress, identify ineffective and inefficient policies and procedures, and work to affect change. 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" (excerpted from the National Academic Advising Association Statement of Core Values of Academic Advising).

To develop and sustain the high quality academic advising program necessary to support and advance an outstanding education for our students, the campus needs to adopt a structure to promote and retain our best and most experienced academic advisors. Advisors who leave the profession or who leave IU-Bloomington for advising positions elsewhere commonly cite low salaries and the lack of opportunity for professional advancement as the reasons.

Moreover, the rigorous standards and evaluation required for promotion will serve to emphasize and advance the adoption of advising practices, behaviors and values to which we want all advisors to aspire.

In establishing a promotion process our goals are to:

- retain a core group of the most qualified advisors to sustain and advance quality advising across the campus
- reward those advisors who contribute to the development and implementation of effective advising practices
- develop a corps of advisors who will provide leadership for new initiatives
- recognize and promote advising practices that improve the quality of the undergraduate educational experience and that enhance student success and retention
- develop a corps of experienced advisors to serve as resources and mentors for newer advisors and others

Promotion Levels

Professional academic advisors will have access to a 3 tier promotional structure reflected by the following titles:

- Academic Advisor = entry level positions

- Academic Advisor, Associate = first level of promotion

- Academic Advisor, Senior = second level of promotion

Promotion Policies

1. Pursuit of promotion is a matter of choice. While all advisors are expected to meet or exceed acceptable standards of performance and are expected to engage in professional development each year, so as to ensure they maintain the skills and knowledge necessary to provide quality advising to students, advisors are not required to pursue promotion.

2. Development of the promotion dossier is the responsibility of the individual seeking promotion. Supervisors should consult with and support those reporting to them in their professional development and in the preparation of the promotional dossier.

3. The minimum length of time a person <u>new to the advising profession</u> would need to serve in the entry level "Advisor" position before they would be eligible to apply for promotion to the <u>Associate level</u> is 3 years.

4. Advisors with prior advising experience from outside IUB can count one year from outside IUB toward the minimum 3 years required "advising service" for eligibility for promotion. The most recent 2 years of advising service must be at IUB. In unusual cases, a unit (RCM) may present an argument for an advisor to be considered who has 3 years of service but only one year at IUB.

5. Candidates who choose to come forward early for promotion and who are utilizing "advising service" from outside IUB must provide documentation of their advising performance from the outside institution.

6. Hourly advising appointments will <u>not</u> be considered in determining "years of service" for the purpose of determining eligibility for promotion.

7. Part-time/half-time permanent appointment advising positions are eligible to apply for promotion based on "years of service"—for example, a half-time advisor could be eligible to apply for promotion based on 3 years of half-time service.

8. Each unit (RCM) will develop and publish for their advisors unit-specific performance definitions for promotion which shall conform to the general campus rubric for advisor promotions (defined below in the section "Promotion Performance Standards"). Other than in the initial 2 years of implementation of the IUB advisor promotion process, any changes to the performance definitions for promotion shall be approved and published a minimum of 2 years prior to being applied in the review of dossiers.

9. Each unit (RCM) will establish and publish a process for review of promotion dossiers. Review and decision by the unit (RCM) will be complete in January. Recommendations for promotion from the unit (RCM) will be due to the campus review committee by January 31 each year.

10. Discontinuous Service:

    a. A break in "advising service" (non-advising role anywhere) of 5 years or more will result in restarting the clock in calculating years of "advising service" for the purpose of determining eligibility for promotion.

    b. A break in "advising service" of more than one year but less than 5 years will require that the person serve as an advisor at IUB for at least one additional year before they will be eligible to apply for promotion.

11. Attainment of the minimum required "years of service" will be based on the fiscal year calendar (July 1- June 30) and will be determined as of July 1 each year. Advisors who meet "years of service" criteria should consult with their supervisor about applying for promotion and about development of their dossier. Advisors who are eligible to apply for promotion based on "years of service" will be notified by HR by August 30 (or the next business day) each year. Advisors who intend to apply for promotion must notify their supervisor of their intent in writing no later than September 15 (or the next business day) of the year in which they intend to apply for promotion.

12. Eligibility for promotion on the basis of "years of service" does not translate automatically into consideration for advancement. Eligible advisors will need to meet the performance standards for promotion, will need the endorsement of their home unit (RCM) and will need the endorsement of the campus-level review committee. Eligibility to apply for promotion does not guarantee the outcome of the review process.

13. Advisors classified as professional exempt remain at-will employees if and when they are promoted to Academic Advisor, Associate or Academic Advisor, Senior; professional exempt advisors do not have a right to a hearing or other due process protections regarding the promotions or employment processes.

POLICIES THAT APPLY ONLY IN THE FIRST YEAR OF IMPLEMENTATION

14. In general advisors will need to advance to and serve at the "Advisor, Associate" level for 2 years before being eligible to seek promotion to "Advisor, Senior," but during the initial phase of implementation of the new promotional structure, advisors with an appropriate record and length of service will be eligible to seek and be considered for immediate promotion to "Advisor, Senior." Access to this process will be dependent on availability of funding.

15. Criteria for advisors who are in service at the time this policy is implemented to apply for immediate promotion to "Advisor, Senior":

    a. Advisors must have 5 years or more service as an advisor.

    b. The most recent 3 years of advising service must be at IUB.

c. Candidates must demonstrate that they have met the criteria for promotion to "Advisor, Senior" for the most recent 2 years of service.

d. Advisors who are determined to be eligible for direct promotion to "Advisor, Senior" can choose whether to come forward for promotion and, if they choose to do so, can choose to apply first for promotion to "Advisor, Associate" or to apply directly for consideration for promotion to "Advisor, Senior".

e. Advisors who are eligible and who apply for immediate promotion to "Advisor, Senior" will, at the same time, be considered for promotion to "Advisor, Associate" if they are not endorsed for immediate promotion to "Advisor, Senior. "

f. Advisors must have 5 years of service by July 1, of the fiscal year in which the promotion structure is first implemented to be eligible to apply for immediate promotion to "Advisor, Senior." HR in cooperation with personnel directors in each unit will determine which advisors meet these criteria and will notify advisors and advising directors. Eligibility for consideration for immediate promotion to "Advisor, Senior" will be limited to this identified group. To be considered for immediate promotion to "Advisor, Senior," those identified as eligible for consideration would need to apply for promotion to "Advisor, Senior" within the first 2 years of the implementation of the promotion process.

Promotion Performance Standards

The campus has established a rubric for advisor promotion comprised of three over-arching competency areas:

- **Advising Practice—** weighted 35% in the final evaluation for promotion

- **Advising Knowledge**—weighted 35% in the final evaluation for promotion

- **Professional Engagement**—weighted 30% in the final evaluation for promotion

To be eligible for consideration for promotion an advisor must "meet expectations" in all of these competency areas and must "exceed expectations" or be "outstanding" in one or more of these competency areas as defined below for each level of promotion and in unit-specific criteria for promotion.

Academic Advisor: *The academic advisor is committed to gaining advising knowledge, developing an informed, advising practice, and participating in professional engagement. Using defined learning outcomes, the academic advisor reinforces and supports student degree progress, academic success and retention, in alignment with unit and university strategic goals and initiatives.*

Category	Meets Expectations Demonstrates all of these characteristics	Exceeds Expectations Demonstrates some or all of these characteristics
Advising Practice Interactions with Students	• Explains requirements, policies, and procedures and the use of student-facing technologies • Demonstrates attentiveness & rapport • Provides general support & challenge related to basic student choices and activities • Makes referrals, based on individual student situation, needs, or interests • Demonstrates basic multi-cultural & inclusion skills • Integrates student's degree progress, interests & abilities into future planning • Uses best practices & technology related to student interactions • Reviews student feedback about the advising experience, using it to enhance advising practice • Communicates overall understanding of institutional or regulatory policies	• Effectively explains exceptions or details related to degree requirements, policies, procedures, and student-facing technologies • Elicits student concerns & interests • Provides tailored support & challenge to individual students, depending on their situations • Guides students in decision-making or problem-solving • Intervenes or makes referrals, based on individual student situation, needs, or interests • Tailors advising interactions to accommodate or incorporate student's cultural identity • Demonstrates multiple approaches to planning for degree completion and overall educational experience • Discusses post-graduate plans, when appropriate • Provides strategies related to academic success • Applies advising best practices, theories, and technologies in day-to-day work • Explains degree requirements, policies, and procedures to groups of students, using provided presentation plans • Elicits student feedback about the advising experience • Communicates details of institutional or regulatory policies • Discusses relevance of curriculum to student's goals
Advising Practice Communication Processes	• Provides clear, accurate, timely explanations of advising-related topics and technologies • Demonstrates professionalism and clarity in communications • Responds to student queries in multiple formats or contexts • Practices appropriate outreach, in alignment with recommended plan • Uses technology in communication • Communicates boundaries appropriately and clearly	• Fine tunes and edits explanations or timing of communications related to advising topics and technologies • Demonstrates skillful professionalism in communications • Appropriately redirects students to other contexts or formats for asking their questions • Proactively initiates outreach, editing plan as needed • Implements best practices when using communication technology • Handles difficult conversations
Advising Practice Organization & Management	• Effectively facilitates one-on-one advising sessions • Manages time & calendar to ensure accessibility to students • Maintains accurate records • Correctly submits student-related advising notes or forms for all student contacts • Responds to all student queries • Completes caseload outreach, as directed • Finds and uses advising-related information, reports, and data • Uses advising technology to manage advising practice, as directed	• Adapts structure of advising session, depending on student's needs • Effectively manages time and calendar to ensure accessibility to students • Maintains detailed, accurate records • Submits student-related advising notes or forms in a timely manner • Responds to all student queries in a timely manner • Proactively initiates caseload outreach • Organizes advising-related information, reports, and data • Capitalizes on effective organizational skills • Applies best practices when using advising technology to manage advising practice

Academic Advisor: *The academic advisor is committed to gaining advising knowledge, developing an informed, advising practice, and participating in professional engagement. Using defined learning outcomes, the academic advisor reinforces and supports student degree progress, academic success and retention, in alignment with unit and university strategic goals and initiatives.*

Category	Meets Expectations Demonstrates all of these characteristics	Exceeds Expectations Demonstrates some or all of these characteristics
Advising Knowledge Requirements, Policies, & Procedures	• Demonstrates knowledge of IUB and degree requirements • Demonstrates knowledge of IUB and unit-specific policies and procedures	• Demonstrates nuanced knowledge of IUB and degree requirements • Demonstrates nuanced knowledge of IUB and unit-specific policies and procedures
Advising Knowledge Theories, Concepts, & Best Practices	• Demonstrates familiarity with theories about advising, student development, and learning cognition • Demonstrates knowledge of best practices related to advising • Identifies resources related to career development inventories or concepts • Demonstrates knowledge of the diversity of student backgrounds and experiences • Identifies perspectives and circumstances related to multi-cultural understanding and inclusion	• Demonstrates nuanced understanding of theories or best practices related to advising, student development, or learning cognition • Seeks out best practices • Seeks out resources related to career development inventories or concepts • Seeks out detailed understanding of students' diverse backgrounds and experiences • Demonstrates understanding of multi-cultural issues and considerations as they relate to the IUB experience
Advising Knowledge Data & Technology	• Demonstrates knowledge of how to access and use advising-related data • Demonstrates knowledge of enterprise and unit-specific technology relevant to advising	• Demonstrates nuanced understanding of data related to advising • Demonstrates thorough knowledge of enterprise and unit-specific technology relevant to advising
Advising Knowledge Campus Resources & High Impact Practices	• Demonstrates knowledge of relevant resources across campus and related referral processes • Demonstrates knowledge of high impact practices (study abroad, internships, research, etc.)	• Seeks knowledge of relevant campus resources and referral processes • Demonstrates specific knowledge and guidelines related to high impact practices

Academic Advisor: *The academic advisor is committed to gaining advising knowledge, developing an informed, advising practice, and participating in professional engagement. Using defined learning outcomes, the academic advisor reinforces and supports student degree progress, academic success and retention, in alignment with unit and university strategic goals and initiatives.*

Category	Meets Expectations Demonstrates all of these characteristics	Exceeds Expectations Demonstrates some or all of these characteristics
Professional Engagement Professional Development	• Participates in a team or serves on a committee, at the unit or campus level • Attends professional development events or activities • Collaborates effectively with members of the home unit or department	• Actively participates on a team or committee, at the unit or campus level • Seeks out professional development events and activities and actively engages in them • Collaborates effectively with members of both the home unit and beyond
Professional Engagement Projects & Initiatives	• Implements administrative initiatives, projects, or programs as prescribed • Provides feedback for changes in systems or procedural policies • Contributes feedback or input related to projects or initiatives	• Proactively and effectively implements administrative initiatives, projects, or programs • Recommends improvements for systems or procedural policies, at the unit or campus level • Gathers data or feedback related to projects or initiatives
Professional Engagement Innovation & Creativity	• Makes minor improvements or revisions to resources, processes, or utilized by students or advisors	• Makes improvements or revisions to resources and processes utilized by students or advisors • Practices new approaches to interacting with students or colleagues

Academic Advisor, Associate: *Academic Advisor – Associate: The Academic Advisor – Associate demonstrates breadth in advising knowledge, skill in advising practice, and active participation in professional engagement. Using a variety of advising methods and strategies, the academic advisor – associate tailors daily advising to the interests, goals, and needs of specific students or groups of students. The Academic Advisor – Associate is proactive in implementing unit and university strategic goals and initiatives.*

Category	Meets Expectations Demonstrates all of these characteristics (Same as Exceeds Expectations for Academic Advisor)	Exceeds Expectations Demonstrates some or all of these characteristics
Advising Practice Interactions with Students	• Effectively explains exceptions or details related to degree requirements, policies, procedures, and student-facing technologies • Elicits student concerns & interests • Provides tailored support & challenge to individual students, depending on their situations • Guides students in decision-making or problem-solving • Intervenes or makes referrals, based on individual student situation, needs, or interests • Tailors advising interactions to accommodate or incorporate student's cultural identity • Demonstrates multiple approaches to planning for degree completion and overall educational experience • Discusses post-graduate plans, when appropriate • Provides strategies related to academic success • Applies advising best practices, theories, and technologies in day-to-day work • Explains degree requirements, policies, and procedures to groups of students, using provided presentation plans • Elicits student feedback about the advising experience • Communicates details of institutional or regulatory policies • Discusses relevance of curriculum to student's goals	• Researches and explains nuances or inconsistencies, related to degree requirements, policies, or procedures, and student-facing technologies • Reflects student concerns and interests back to the student, showing holistic understanding • Effectively supports and challenges students to stretch outside comfort zone, when appropriate • Guides students in identifying strategies for decision-making or problem-solving • Effectively intervenes or makes specific referrals, based on individual student situation, needs, or interests • Demonstrates cultural competence in one or more areas • Using in-depth knowledge, incorporates elements outside the primary major (minors, certificates, dual degrees, enhancement experiences, etc.) into degree planning • Communicates correlations between educational plans and post-graduate activities • Coaches students in a variety of activities that ensure academic success • Researches best practices related to solving problems in day-to-day work with students • Customizes presentations about advising-related topics, for groups of students • Researches best practices related to gaining student feedback about the advising experience • Communicates the rationale, logic, and impact of institutional or regulatory decisions and changes • Explains logic, meaning, & outcomes of curriculum as they relate to student goals
Advising Practice Communication Processes	• Fine tunes and edits explanations or timing of communications related to advising topics and technologies • Demonstrates skillful professionalism in communications • Appropriately redirects students to other contexts or formats for asking their questions • Proactively initiates outreach, editing plan as needed • Implements best practices when using communication technology • Handles difficult conversations	• Creates effective messaging and identifies timeline for communicating about advising topics and technologies • Creates highly professional messages and communications • Contributes to creation of best practices regarding the types of topics or activities that occur in various advising-related contexts • Plans overall outreach program • Researches or creates best practices for using communication technology • Handles challenging conversations

| **Advising Practice** Organization & Management | Adapts structure of advising session, depending on student's needs Effectively manages time and calendar to ensure accessibility to students Maintains detailed, accurate records Submits student-related advising notes or forms in a timely manner Responds to all student queries in a timely manner Proactively initiates caseload outreach Organizes advising-related information, reports, and data Capitalizes on effective organizational skills Applies best practices when using advising technology to manage advising practice | Researches or creates best practices related to organizing advising sessions Coordinates calendar and schedule with other staff to ensure accessibility to students Researches or creates best practice related to maintaining thorough, accurate records Proactively manages personal schedule to allow for timely submission of advising-related notes or forms and respond to student queries Considers different approaches to managing caseload Seeks out and compiles advising-related information, reports, and data to use in advising practice Researches or creates best practices related to organization Researches or creates best practices related to using advising technology to manage advising practice |

Academic Advisor, Associate: *Academic Advisor – Associate: The Academic Advisor – Associate demonstrates breadth in advising knowledge, skill in advising practice, and active participation in professional engagement. Using a variety of advising methods and strategies, the academic advisor – associate tailors daily advising to the interests, goals, and needs of specific students or groups of students. The Academic Advisor – Associate is proactive in implementing unit and university strategic goals and initiatives.*

Category	Meets Expectations Demonstrates all of these characteristics (Same as Exceeds Expectations for Academic Advisor)	Exceeds Expectations Demonstrates some or all of these characteristics
Advising Knowledge Requirements, Policies, & Procedures	• Demonstrates nuanced knowledge of IUB and degree requirements • Demonstrates nuanced knowledge of IUB and unit-specific policies and procedures	• Uses nuanced knowledge of IUB and degree requirements to pose questions or provide input to unit administrators • Uses nuanced knowledge of IUB and unit-specific policies and procedures to pose questions or provide input to unit administrators • Serves as resource to colleagues about requirements, policies, and procedures
Advising Knowledge Theories, Concepts, & Best Practices	• Demonstrates nuanced understanding of theories or best practices related to advising, student development, or learning cognition • Seeks out best practices • Seeks out resources related to career development inventories or concepts • Seeks out detailed understanding of students' diverse backgrounds and experiences • Demonstrates understanding of multi-cultural issues and considerations as they relate to the IUB experience	• Seeks out or researches details related to theories or best practices related to advising, student development, or learning cognition • Creates or develops best practice • Demonstrates knowledge of career development inventories or concepts • Synthesizes insights and theoretical understandings related to students' diverse backgrounds and experiences • Demonstrates detailed and nuanced understanding of multi-cultural issues and considerations as they relate to the IUB experience or higher education • Serves as a resource for colleagues about theories, concepts, and best practices
Advising Knowledge Data & Technology	• Demonstrates nuanced understanding of data related to advising • Demonstrates thorough knowledge of enterprise and unit-specific technology relevant to advising	• Analyzes advising-related data to use for assessing and shaping advising practice • Serves as a resources for colleagues about advising-related technology • Investigates the use of new technologies that could support advising
Advising Knowledge Campus Resources & High Impact Practices	• Seeks knowledge of relevant campus resources and referral processes • Demonstrates specific knowledge and guidelines related to high impact practices	• Demonstrates in-depth understanding of activities or services offered by relevant campus resources • Demonstrates understanding of how high impact practices contribute to a holistic college experience

Academic Advisor, Associate: *Academic Advisor – Associate: The Academic Advisor – Associate demonstrates breadth in advising knowledge, skill in advising practice, and active participation in professional engagement. Using a variety of advising methods and strategies, the academic advisor – associate tailors daily advising to the interests, goals, and needs of specific students or groups of students. The Academic Advisor – Associate is proactive in implementing unit and university strategic goals and initiatives.*

Category	Meets Expectations **Demonstrates all of these characteristics** (Same as Exceeds Expectations for Academic Advisor)	Exceeds Expectations **Demonstrates some or all of these characteristics**
Professional Engagement Professional Development	• Actively participates on a team or committee, at the unit or campus level • Seeks out professional development events and activities and actively engages in them • Collaborates effectively with members of both the home unit and beyond	• Takes a leading role (not necessarily as identified leader) on team or committee, at the unit or campus level • Actively participates in shaping or coordinating professional development events or activities • Demonstrates skill in presenting information or ideas to colleagues • Demonstrates skillful collaboration, at the unit or campus level
Professional Engagement Projects & Initiatives	• Proactively and effectively implements administrative initiatives, projects, or programs • Recommends improvements for systems or procedural policies, at the unit or campus level • Gathers data or feedback related to projects or initiatives	• Researches, recommends, or creates best practices for unit or campus initiatives, projects, or programs • Assists in the development of project or program within unit • Proposes or designs improvements for systems or procedural policies, at the unit or campus level • Interprets or analyzes data or feedback related to projects or initiatives
Professional Engagement Innovation & Creativity	• Makes improvements or revisions to resources and processes utilized by students or advisors • Practices new approaches to interacting with students or colleagues	• Makes creative or innovative improvements or revisions to resources or processes utilized by students or advisors • Researches and implements new approaches to interacting with students or colleagues

Academic Advisor, Senior: *The Academic Advisor – Senior demonstrates mastery of advising knowledge, models expertise in advising practice, and shows depth in professional engagement. Using advising and student development theories, institutional data, and research findings, the Academic Advisor – Senior implements best practices that enhance the student experience, support the growth and proficiency of colleagues, and contribute to the unit and university strategic goals and initiatives.*

Category	Meets Expectations Demonstrates all of these characteristics (Same as Exceeds Expectations for Academic Advisor - Associate)	Exceeds Expectations Demonstrates some or all of these characteristics
Advising Practice Interactions with Students	• Researches and explains nuances or inconsistencies, related to degree requirements, policies, or procedures, and student-facing technologies • Reflects student concerns and interests back to the student, showing holistic understanding • Effectively supports and challenges students to stretch outside comfort zone, when appropriate • Guides students in identifying strategies for decision-making or problem-solving • Effectively intervenes or makes specific referrals, based on individual student situation, needs, or interests • Demonstrates cultural competence in one or more areas • Using in-depth knowledge, incorporates elements outside the primary major (minors, certificates, dual degrees, enhancement experiences, etc.) into degree planning • Communicates correlations between educational plans and post-graduate activities • Coaches students in a variety of activities that ensure academic success • Researches best practices related to solving problems in day-to-day work with students • Customizes presentations about advising-related topics, for groups of students • Researches best practices related to gaining student feedback about the advising experience • Communicates the rationale, logic, and impact of institutional or regulatory decisions and changes • Explains logic, meaning, & outcomes of curriculum as they relate to student goals	• Provides an in-depth analysis or makes recommendations related to possible exceptions, opportunities, and combinations related to requirements, policies, or procedures • Uses expertise and creativity in engaging students in conversations, eliciting their concerns, and leading them through problem-solving or decision-making processes • Finely gauges the level of support and challenge needed by a specific student in order to move toward self-authorship and autonomy • Provides opportunities that lead students to come to their own insights and decisions • Effectively, and appropriately, intervenes or makes referrals in crisis situations • Demonstrates sophisticated cultural competence across multiple cultures or identities • Helps students see possible connections between seemingly disparate interests, suggests educational options that the student might not have considered, and links present choices to future options or consequences • Provides specific examples and referrals related to post-graduate opportunities and choices • Explains various approaches to managing and enhancing the college experience, depending on a student's situation, interests, long-term goals, skills, and willingness to take risks, to ensure academic success • Informed by literature, current research, and best practices, creates strategies for applying a comprehensive understanding of advising and student development theory to day-to-day practice • Creates presentations about advising-related topics, for groups of students • Assesses student satisfaction and engagement with advising and recommends improvements in practice • Assesses student understanding of the impact of institutional or regulatory decisions and changes • Assesses student understanding of the curriculum and mastery of student learning outcomes
Advising Practice Communication Processes	• Creates effective messaging and identifies timeline for communicating about advising topics and technologies • Creates highly professional messages and communications • Contributes to creation of best practices regarding the types of topics or activities that occur in various advising-related contexts • Plans overall outreach program • Researches or creates best practices for using communication technology • Handles challenging conversations	• Assesses effectiveness of messaging and timing of communicates related to advising topics and technologies • Plans strategically professional messaging, customized for various groups • Creates guidelines and best practices regarding the types of topics or activities that occur in various advising-related contexts • Assesses outreach program • Assesses use and effectiveness of advising communications and communication technology • Communicates effectively in crisis situations

| **Advising Practice** Organization & Management | • Researches or creates best practices related to organizing advising sessions
• Coordinates calendar and schedule with other staff to ensure accessibility to students
• Researches or creates best practice related to maintaining thorough, accurate records
• Proactively manages personal schedule to allow for timely submission of advising-related notes or forms and respond to student queries
• Considers different approaches to managing caseload
• Seeks out and compiles advising-related information, reports, and data to use in advising practice
• Researches or creates best practices related to organization
• Researches or creates best practices related to using advising technology to manage advising practice | • Assesses effectiveness of various approaches to organizing advising sessions
• Assesses overall advising schedule
• Assesses thoroughness and accuracy of records
• Assesses timeliness of the submission of advising notes and forms and responses to student queries
• Creates strategic plan for caseload management
• Assesses and reports on advising-related information or data
• Assesses potential organizational approaches or systems, recommends their use, and implements strategic changes, as needed
• Assesses use of advising technology |

Academic Advisor, Senior: *The Academic Advisor – Senior demonstrates mastery of advising knowledge, models expertise in advising practice, and shows depth in professional engagement. Using advising and student development theories, institutional data, and research findings, the Academic Advisor – Senior implements best practices that enhance the student experience, support the growth and proficiency of colleagues, and contribute to the unit and university strategic goals and initiatives.*

Category	Meets Expectations Demonstrates all of these characteristics (Same as Exceeds Expectations for Academic Advisor - Associate)	Exceeds Expectations Demonstrates some or all of these characteristics
Advising Knowledge Requirements, Policies, & Procedures	• Uses nuanced knowledge of IUB and degree requirements to pose questions or provide input to unit administrators • Uses nuanced knowledge of IUB and unit-specific policies and procedures to pose questions or provide input to unit administrators • Serves as resource to colleagues about requirements, policies, and procedures	• Serves as expert or go-to person about requirements, policies, and procedures, for administrators or colleagues
Advising Knowledge Theories, Concepts, & Best Practices	• Seeks out or researches details related to theories or best practices related to advising, student development, or learning cognition • Creates or develops best practice • Demonstrates knowledge of career development inventories or concepts • Synthesizes insights and theoretical understandings related to students' diverse backgrounds and experiences • Demonstrates detailed and nuanced understanding of multi-cultural issues and considerations as they relate to the IUB experience or higher education • Serves as a resource for colleagues about theories, concepts, and best practices	• Shows knowledge of IU or national trends related to advising theories or best practices • Serves as expert or go-to person regarding multi-cultural considerations at IU or in higher education • Serves as expert or go-to person regarding advising theories, concepts, or best practices • Demonstrates knowledge of policies and processes regarding researching, writing, or presenting, related to advising
Advising Knowledge Data & Technology	• Analyzes advising-related data to use for assessing and shaping advising practice • Serves as a resources for colleagues about advising-related technology • Investigates the use of new technologies that could support advising	• Identifies research or advising assessment data to be gathered • Designs or develops methodologies for collecting data • Serves as expert or go-to person regarding advising data or technology • Analyzes value or use of new technologies
Advising Knowledge Campus Resources & High Impact Practices	• Demonstrates in-depth understanding of activities or services offered by relevant campus resources • Demonstrates understanding of how high impact practices contribute to a holistic college experience	• Serves as expert or go-to person regarding campus resources or high impact practices

Academic Advisor, Senior: *The Academic Advisor – Senior demonstrates mastery of advising knowledge, models expertise in advising practice, and shows depth in professional engagement. Using advising and student development theories, institutional data, and research findings, the Academic Advisor – Senior implements best practices that enhance the student experience, support the growth and proficiency of colleagues, and contribute to the unit and university strategic goals and initiatives.*

Category	Meets Expectations Demonstrates all of these characteristics (Same as Exceeds Expectations for Academic Advisor - Associate)	Exceeds Expectations Demonstrates some or all of these characteristics
Professional Engagement Professional Development	• Takes a leading role (not necessarily as identified leader) on team or committee, at the unit or campus level • Actively participates in shaping or coordinating professional development events or activities • Demonstrates skill in presenting information or ideas to colleagues • Demonstrates skillful collaboration, at the unit or campus level	• Leads team or committee, at the unit, campus, or inter-campus level • Lead or coordinates professional development events or activities, at the unit, campus, or inter-campus level • Presents at professional development events or activities, at the unit, campus, or inter-campus level • Demonstrates collaborative leadership at the unit, campus, or inter-campus level
Professional Engagement Projects & Initiatives	• Researches, recommends, or creates best practices for unit or campus initiatives, projects, or programs • Assists in the development of project or program within unit • Proposes or designs improvements for systems or procedural policies, at the unit or campus level • Interprets or analyzes data or feedback related to projects or initiatives	• Publishes or presents bests practices to advising community • Leads the development of a project or program within advising community • Designs and implements improvements for systems or procedural policies for the advising community • Uses data to assess and inform future practices
Professional Engagement Innovation & Creativity	• Makes creative or innovative improvements or revisions to resources or processes utilized by students or advisors • Researches and implements new approaches to interacting with students or colleagues	• Publishes or presents creative innovations related to resources or processes, to the advising community • Publishes or presents new approaches to interacting with students or colleagues

As indicated under the section "Promotion Policies" above: "Each unit (RCM) will develop and publish for their advisors unit-specific performance definitions for promotion which shall conform to the general campus rubric for advisor promotions."

Promotion Application Dossier and Documentation

- Letter or statement of support from the unit (RCM), in which the advisor serves, endorsing the promotion. The letter from the RCM would be the result of the RCM's review process.

- Letter or statement from the home department in which the advisor serves or from the advisor's supervisor.

- Statement from the advisor addressing how they meet the criteria for promotion

- Current advisor resume/cv

- Annual evaluation narratives written by the supervisor for the candidate's most recent three years of advising service

- Student feedback for the most recent three years. This student feedback can be in the form of student responses to routine surveys or could be supervisor solicited responses from a subset of the advisor's students or a combination of these. Student feedback should include a representative sample of students assigned to the advisor.

- A minimum of 3 letters of support from professional colleagues (advisors, faculty or staff); at least one of these letters should be from a colleague within the home <u>department</u> and at least one letter should be from a colleague outside the home <u>department</u> (Example: An advisor in the Department of History would need one letter from a colleague within the Department of History and at least one letter from a colleague outside the Department of History. The outside letter could come from a colleague within or outside the RCM (the College). Letters should address the candidate's performance in one or more of the advising competency areas for promotion.

    o **NOTE**—A minimum of four letters should be included in the dossier when it is submitted for review by the Unit Review Committee including one letter from the supervisor plus at least three letters of support from professional colleagues as described above. Clarification added 4/23/2019 by E. Guertin.

- Candidates for promotion are encouraged to include additional documentation in support of their application.

- o **NOTE**—The promotion dossier should not exceed seventy pages (including all letters, narratives, the cv, and all supporting documentation). Clarification added 4/23/2019 by E. Guertin.

Promotion Review Process and Deadlines

16. Advisors who are eligible to apply for promotion based on "years of service" will be notified by HR by August 30 (or the next business day) each year. Advisors who intend to apply for promotion must notify their supervisor of their intent in writing no later than September 15 (or the next business day) of the year in which they intend to apply for promotion.

17. Each unit (RCM) will establish and publish a process for review of promotion dossiers. Review and decision by the unit (RCM) will be complete in January. Recommendations for promotion from the unit (RCM) along with the full dossiers of candidates endorsed for promotion will be due to the campus review committee by January 31 each year.

18. The campus level review of candidates for promotion will be complete by the end of February and decisions will be communicated to the unit (RCM) no later than March 7, or the next business day, each year. The unit is responsible for communicating the results of the promotion review process to the candidate.

19. The campus level review committee shall be comprised of 6-8 members from the breadth of RCM's that employ professional advisors and should include:

    a. at least one advisor (after the initial year of implementation the advisor should be an advisor who has gained promotion)

    b. at least one advising director

    c. at least one faculty member, and

    d. one representative from the Office of the Vice Provost for Undergraduate Education.

20. Members of the campus level review committee shall be appointed by the Provost, or her/his designee, to serve staggered terms of either 2 or 3 years.

Compensation

For each level of promotion, candidates who achieve promotion shall receive compensation in base salary in addition to whatever merit increase is awarded in the year of promotion.

Task Force on Professional Advisor Promotion

*Elizabeth Guertin, Assistant Vice Provost for Undergraduate Education & Executive Director of Advising, Chair, Advisor Promotion Task Force

Dan Woodside--Athletics Advising

Katherine Emblom--College of Arts & Sciences

Mac G. Francis--Health Professions & Prelaw Advising

Barbara Grinder-School of Public Health

Arnell Hammond--Hutton Honors College

Theresa Hitchcock--School of Public Health

Deborah Dee Hrisomalos—School of Nursing

Mark Hurley—College of Arts & Sciences

Jenifer Leigh Berry—21st Century Scholars

Kimberly Jenkins—Groups Scholars Program

Jim Gibson—School of Public Health

Lauren A. Kinzer—Media School

Nancy Lemons—School of Informatics and Computer Science

Lauren McCants--Kelley School of Business

Gail Fairfield--Kelley School of Business

Timothy Niggle--School of Education

Mary O'Shea—University Division

Jennifer Poe—Hudson Holland Scholars

John W. Schrader--School of Public Health

Amy Bastin—School of Public and Environmental Affairs

Adrienne Sewell--University Division

William Earl Smith III--President, Bloomington Academic Advising Association (Academic Advisor, College of Arts & Sciences)

Erin A.Woodley--Jacobs School of Music