



The New Advisor Guidebook

Mastering the Art of
Academic Advising

Pat Folsom
Franklin Yoder
Jennifer E. Joslin
EDITORS

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*This book is dedicated to all embarking on the journey
to master the art of academic advising.*

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P R E F A C E

This is an exciting time to become an academic advisor—a time in which global recognition of the importance of advising is growing, and research affirms the critical role advising plays in student success (Klepfer & Hull, 2012). This positive attention to the field also means that advisors, regardless of their specific responsibilities, face the intense challenge to deliver quality services responsive to the specific contexts of the institution and the changing needs of students (Wallace, 2013, ¶3). This second edition of *The New Advisor Guidebook* is specifically designed to help first-time advisors meet this challenge. As the first of three books in the newly developed academic advisor core resource library, it also prepares advisors to meet the students' advising needs over time and within a continuously changing higher education environment.

Changing Emphases in Higher Education

State, provincial, federal, and national parliamentary bodies are compelling postsecondary institutions to focus on degree completion, financial affordability, career attainment, the worth and efficacy of higher education, and the burden borne by citizens, students, parents, and governments. The resulting focus on college completion has increased the scrutiny of policies extant before the global financial crisis in the late 2000s and inspired new policies; for example, performance-based funding has replaced enrollment-based funding. This reprioritization is associated with increased involvement of government entities and higher education foundations.

Agents of change are paying attention to graduation rates and progression, career and work readiness, appropriate major choices, and careers in science, technology, engineering, and math as well as service-oriented business environments. The Georgetown Center on Education and the Workforce, The Lumina Foundation, and other nonprofit organizations stress that college-bound students should consider financial aid responsibilities, graduation and progression rates, and majors that lead to the best job postgraduation (e.g., Carnevale, 2013; Carnevale, Smith, & Strohl, 2010). In the United States, President Obama has called for greater institutional transparency such that students and their parents can access information helpful for making optimal choices for the postsecondary experience.

As the burden for higher education has shifted from taxpayers to students and parents in the United States, the United Kingdom, and elsewhere, institutions have redoubled efforts on effective academic advising, personal tutoring, and other student support services (Field, 2015; Organisation for Economic Co-operation and Development, 2012; Thomas, 2012). Advising administrators as well as practitioners have responded to the new demands by highlighting the importance of adequate staffing,

state-of-the-art technology tools, assessment, and training and ongoing professional development for long-term effective advising.

Current State of Advisor Training and Development

The increased attention on the importance of effective academic advising leads to greater recognition of the importance of and need for advisor training and ongoing professional growth and development. To deliver advising that enhances students' educational experiences, aids in fulfilling institutional missions and goals, and meets the changing emphases in higher education, advisors must participate in opportunities for professional growth.

The first edition of this *Guidebook* (Folsom, 2007) offered a vision for a comprehensive approach to advisor training and development, calling for programs that include “year-long new-advisor development programs” (Folsom, 2007, p. 8) and “that provide ongoing training support” to ensure that newcomers to the field “fully develop as advisors” (p. 8). More recently, Julie Givans Voller (2011) explicitly outlined the requisite components of a comprehensive approach to advisor training and development:

Comprehensive programs include pre-service training for new advisors as well as ongoing support throughout a new advisor's first year in the field. Moreover, they include continuous professional development through multiple delivery methods for experienced advisors at all stages of their careers. ¶3

However, upon review of the 2011 NACADA *National Survey of Academic Advising*, Givans Voller (2013) noted that “fewer than one half of the respondents indicated receiving pre-service training and individualized development and nearly one tenth received no training or development” (¶3). She also pointed out, “Even though the success of advising hinges upon the strength of training provided from pre-service until the end of an advisor's career, the number of institutions supporting comprehensive training and development programs for advisors is low” with “fewer than one half (47%) of institutions [offering the components] . . . , which embody the definition of *comprehensive*” (Givans Voller, 2013, ¶3).

Recent publications indicate that despite making some progress in training content, institutions need to substantially improve access to extensive initiatives (Fusch & Phare, 2014). An Academic Impressions survey of advising directors (Fusch & Phare, 2014) indicated that the content of training has improved since the publication of the first edition of the *Guidebook*: “Most formal training programs remain short, heavily information-driven sessions” (Folsom, 2007, p. 7, summarizing from Gordon & Habley, 2000). In fact, the Academic Impressions survey revealed that most directors of advising offer “some training in developmental and intrusive advising, rather than merely prescriptive [*sic*] advising” (Fusch & Phare, 2014, ¶4) and that “approximately

65% provide training in the other skill sets: relational (establishing trust, communication, questioning, mentorship), conceptual (the theory and practice of advising, student rights/responsibilities), and personal (including personal growth and professional development)” (¶2). Although conceptual and relational components of advising are incorporated into initiatives at some institutions, in general, training programs appear to remain information heavy: “More than 90% of directors provide some training on informational skills” (Fusch & Phare, 2014, ¶2).

The amount of training advisors may receive remains discouraging. According to the Academic Impressions survey, “Only 61% offer an orientation for new advisors” and “a sizeable minority offers no training at all” (Fusch & Phare, 2014, ¶6). These findings indicate little, if any, improvement since 2011, when the *NACADA National Survey of Academic Advising* revealed that 40% of institutions provide pre-service training (Carlstrom & Miller, 2013). As Givans Voller (2013) explained, these findings “suggest that college students may know more about the institution than their advisors do” (¶8).

In fact, ongoing training and development efforts fall short of the continuous professional development critical for comprehensive programs (Givans Voller, 2013). According to the Academic Impressions survey, ongoing training and development—a critical component of comprehensive programs—is not being maximally offered by advising directors (Fusch & Phare, 2014, ¶7):

- 65% . . . offer occasional workshops.
- 62% facilitate some form of peer advising or mentorship.
- . . . 51% offer a structured series of ongoing trainings (which may, or may not, be mandatory).

Most of the directors responding to the 2014 Academic Impressions survey worked with professional advisors, but an earlier survey targeting academic deans and department chairs as well as advising directors paints an equally alarming picture of training for faculty advisors (Fusch, 2012). Survey results indicate that “three quarters of the institutions surveyed rely heavily on faculty advisors,” yet “faculty advisors often receive little or no training” even at institutions where “there were many resources available for training and developing professional staff” (Fusch, 2012, ¶2).

Results from the Academic Impression surveys (Fusch, 2012; Fusch & Phare, 2014) suggest that institutions are not fulfilling goals for preparing and developing effective academic advisors. The question posed by directors in the latest Academic Impressions survey may reveal much about the work left to do: “How do you move training beyond just an information dump, and ensure that advisors will be equipped and driven to implement what they’re learning?” (Fusch & Phare, 2014, ¶8). In the long term, this question can be addressed by the implementation of comprehensive advisor training and development programs at all institutions of higher education. More immediately, leaders in the advising field must (a) create a common advising

curriculum delineating the knowledge and skills new advisors must acquire, (b) provide advisors with the resources to study this curriculum, and (c) give advisors the tools to manage their development. The academic advisor core resource library offers effective tools for new advisors, even for those without access to formal training programs.

The Academic Advisor Core Resource Library

The academic advisor core resource library supports all advisors in their development over time: as they enter the field, gain proficiency, and master the art of advising. The resource library is composed of three books, each of which addresses one of the three essential components of advising (Habley 1987, 1995; chapter 2):

- The informational component includes knowledge advisors must acquire.
- The relational component reflects the communicative skills and approaches advisors must master.
- The conceptual component refers to the ideas and theories that advisors must understand.

The *Guidebook* offers the informational component. It introduces readers to and provides the foundational basis for all three components of advising. The book also offers guidelines for meeting goals related to the three components in the advisor's first year through foundational mastery (three or more years). The *Guidebook* is Advising 101 and serves as the entry point to the core resources for most new advisors.

Academic Advising Approaches: Strategies That Teach Students to Make the Most of College (Drake, Folsom, & Miller, 2013) focuses on the relational component. As they grow more proficient in their craft, academic advisors expand their relational skills to include a variety of approaches and strategies that help students understand and take advantage of the college experience. *Approaches* provides a comprehensive examination of the communicative strategies advisors invoke, as appropriate, to address the diverse and sometimes difficult issues students bring to advising sessions. The *Approaches* book is considered Advising 201, the second-level core resource for advisors (Year 2 and beyond).

Beyond Foundations: Becoming a Master Advisor (Grites, Miller, & Givans Voller, forthcoming) concentrates on the conceptual component of academic advising, including a variety of topics that experienced, master advisors must understand to make a difference for their students, campus, and profession. *Beyond Foundations*, Advising 301, is targeted to advisors who have been practicing the craft for more than three years.

The New Advisor Guidebook: Audience, Focus, and Aims

The audience for the updated *New Advisor Guidebook* extends to faculty or professional advisors new to the field. We anticipate that those establishing or refining training programs will utilize the *Guidebook* as a resource for advisors, and it will serve as the primary resource for advisors managing their own development. We encourage those institutions and associations worldwide to use the *Guidebook* as a curriculum guide for those new to the profession, especially those responsible for their own self-development.

Advisors develop excellence through formal study, training, practice, and observation (The American Heritage College Dictionary, 1993). As experiential learners, academic advisors remain students in their fields to gain mastery and achieve excellence (chapter 1). The content and design of the new *Guidebook* support the experiential learning journey advisors take to master the art of advising.

Each chapter focuses on foundational content: the basic terms, concepts, information, and skills advisors must learn in their first year and upon which they will build expertise over time. In addition, within each chapter, contributors have created pathways to practice for new advisors: strategies, questions, guidelines, examples, and case studies that help them connect foundational content to their work with students. For example, Kim Roufs (chapter 4) describes a number of student development theories and demonstrates ways they may be employed in advising sessions; Karen Archambault (chapter 10) identifies five questions advisors can use to gain awareness of their biases and avoid making assumptions about students and then illustrates their use in student situations; Jayne Drake (chapter 12) presents case studies to demonstrate various advising approaches. Additional practice-oriented materials are included in Applications and Insights, such as Peggy Jordan's checklist for listening, interviewing, and referral skills (chapter 11), and Voices From the Field, that feature advising concepts in practice; for example, Anna Chow (chapter 10) applies Archambault's self-knowledge questions to advising international students.

In addition to pathways to practice, we embedded other key elements of advising within chapter content. The authors integrated concepts of diversity as they apply to the advising field (e.g., student populations, advisor role, and institutional type) into their chapters. They also integrated the use of technology, focusing on ways it affects practice. Contributors aimed to keep the full scope of advising practice in their specialized treatises. Those who have served as trainers recognize that new advisors often focus on the mastering of information and the acquisition of communication as the goals for development. As editors, we wanted new advisors to understand that fundamental knowledge and skills provide the tools to use in helping students succeed.

The *Guidebook* also offers new advisors a framework as well as strategies and tools for managing their own development. An updated New Advisor Development Chart (chapter 1) outlines the knowledge and skills practitioners must acquire to effectively advise students. In the Chart, advisors will find two sets of expectations: those realistic for mastering knowledge and skills at the end of one year and those for

foundational mastery at the end of three years (chapter 1). The first chapter also includes a learning taxonomy (Anderson et al., 2000) advisors can use to benchmark their development. Aiming for Excellence activities at the end of each chapter give advisors concrete ideas and strategies for expanding their knowledge and improving their skills. Franklin Yoder and Jennifer E. Joslin (chapter 17) present advisors with a framework, guidelines, and a calendar template to manage their growth through a year-long self-development program.

Organization

The first and final chapters of the book identify the knowledge and skills advisors must master. These chapters also present frameworks for setting goals, benchmarking progress, and creating self-development plans. Between these two chapters lies the heart of the book—the content advisors need to read, learn, and apply, as well as use for reflection, as they begin to work with students. This core material is divided into four parts. The first four individual parts present the three essential components of academic advising: conceptual, informational, and relational. Parts four and five address the various ways in which advisors deliver advising: one-to-one, in groups, and online. The book concludes with a section on training and professional growth. Readers will find that the New Advisor Development Chart (chapter 1) closely aligns with this organizational scheme.

Definitions

We made an editorial decision to use Linda Higginson's (2000) framework for the informational component of advising—institutional, external, and self-knowledge as well as student needs—in part three of the book. The use of this framework provides consistency across chapters in addressing various aspects of the informational component. We offer a new feature in this edition: a glossary of terms specific to the advising field (part two). The glossary offers new advisors a quick, easy-to-use point of reference as they read chapters or seek to refresh their understanding of advising terminology.

In addition to chapters, we include practice-based features: Applications and Insights, Voices From the Field, and Aiming for Excellence activities. These terms may be applied differently in other NACADA materials. For the purposes of this publication they are defined as follows:

- Applications and Insights are short, practice-based materials that assist advisors in thinking about or applying concepts outlined in the chapters. They may include checklists, questions, outlines, and brief descriptors or strategies (e.g., characteristics of effective advisors).
- Voices From the Field feature information, concepts, and theories applied to the practice of advising as explained by seasoned practitioners.

- Aiming for Excellence activities and queries offer concrete strategies and ideas for advisors to use in managing their growth and development.

Final Thoughts

We congratulate readers on entering this vibrant and rewarding field. We, too, were once new, and we remember how excited—and nervous—we were at the prospect of getting to know and work with our students. We assure readers that they are not expected to possess the knowledge and skills they need to be master advisors on their first day or even in their first year. Advisors achieve excellence through an experiential learning process over many years.

This book sends the advisor on the first leg of the journey. It is designed to help new advisors gain proficiency in advising and to chart their growth as they do so. Although the content focuses on the knowledge and skills advisors need to acquire in their first year, the practice-based materials offer guidance for the years leading to foundational mastery. As advisors apply knowledge they have gained from this book and reflect on their specific experiences in the field, they should return to various chapters and features to document their progress and set new goals. Like the editors and contributors to the first edition of the *Guidebook*, we hope that each advisor’s personal copy of this edition “has notes in the margins and becomes dog-eared” (Folsom, 2007, p. 9). We wish all new advisors a rewarding and successful journey!

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ACKNOWLEDGMENTS

The first edition of *The New Advisor Guidebook: Mastering the Art of Advising Through the First Year and Beyond* (Folsom, 2007) served as an introduction for professional advisors new to the field. In this revision, we expanded the scope to include all advisors worldwide while maintaining the focus on first-year knowledge and skills acquisition. We consider this edition Advising 101 and the first in the academic advisor core resource library from NACADA: The Global Community for Academic Advising.

Like professors who must choose the content and format for an introductory course in psychology or biology, we started the revision by asking questions: What information will give students the best understanding of the field? What formats and activities will best help students learn and apply their knowledge? What topics will provide students with the best foundation upon which to build a comprehensive base of knowledge and skills? The answers to these questions have evolved over time, the result of multiple reviews, comments, suggestions, and chapter drafts by experts in advising. The creation of this book has been a journey, and we appreciate the efforts and contributions of every person who traveled with us, kept us moving forward, and brought this project to a successful conclusion.

Review Panel for *The New Advisor Guidebook*, First Edition

We thank members of the review panel who re-addressed the original text of *The New Advisor Guidebook* (Folsom, 2007). Your insightful analyses, thoughtful comments, and useful suggestions on the first publication challenged us as we deliberated about changes needed to update the book and to meet new advisors' training and development needs. We found ourselves continuously returning to your comments as we addressed the book's content and format. We added a learning taxonomy, improved the alignment between chapters and the New Advisor Development Chart, and specifically targeted Voices From the Field components as results of your review. We so appreciate the strong support of the NACADA: The Global Community for Academic Advising Publications Advisory Board, New Advising Professionals Commission, and Faculty Advising Commission that provided such a talented team of reviewers.

Karen Archambault, Drexel University

Catherine Coe, University of Florida

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Content Review Panel for *The New Advisor Guidebook*, Second Edition

We also thank members of the content review panel for your assistance in the early phases of the second edition of *The New Advisor Guidebook*. Your comments and suggestions helped us identify content gaps, define the key questions, and clarify our direction.

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Your expertise, feedback at the annual meeting, and ongoing drafts helped us identify the most important and foundational information to include for new advisors. We appreciate your extensive time and effort to meet our requests to include pathways

to practice, integrate diversity (advisor, institutional, and student), and explain uses of technology in chapter content. We along with new and future advisors thank you for your contribution to this important project. We encourage readers to check out The Authors section to find out more about the contributors and their passions for helping new advisors succeed.

Executive Office

We thank the Executive Office of NACADA: The Global Community for Academic Advising for their superb support on this book. We offer a special thanks to Marsha Miller, Assistant Director for Resources and Services, whose knowledge of advising research and resources is unparalleled and who, even when we experienced bumps in the road, stepped in and found ways to move us forward. We also extend a very special thanks to Nancy Vesta, NACADA copy editor, for her keen eye and ability to polish our prose to professional standards.

Finally, we dedicate this book to all new advisors and wish them success in their journey to master the art of advising.

PAT FOLSOM
FRANK YODER
JENNIFER E. JOSLIN
EDITORS

Reference

Folsom, P. (Ed.). (2007). *The new advisor guidebook: Mastering the art of advising through the first year and beyond* (Monograph No. 16). Manhattan, KS: National Academic Advising Association.

THE EDITORS



Pat Folsom is the retired Assistant Provost for Enrollment Management and Director of the Academic Advising Center at the University of Iowa. Folsom has 30 years of experience in academic advising including overseeing an exemplary practice advisor development program and serving on the design team for the building in which the Center is housed. Folsom implemented a number of programs for first-year students at the University including IowaLink, a first-year program for at-risk students; The College Transition, a first-year seminar; and College Success Seminar, a course for first-year students on probation. As Assistant Provost, she also worked on initiatives for undergraduate student success including strategic planning for the needs of international students, restructuring the content and format of student orientation programs, and implementing academic support service programming for students. In addition to NACADA: The Community for Academic Advising conference presentations and a webinar, she was the editor of *The New Advisor Guidebook: Mastering the Art of Advising Through the First Year and Beyond* (2007) and has contributed chapters to *Academic Advising: A Comprehensive Handbook (2nd edition)* (2008), *Comprehensive Advisor Training and Development: Practices that Deliver* (2010), and *Academic Advising Administration: Essential Knowledge and Skills for the 21st Century* (2011). Folsom has served as Chair of the Advisor Training and Development Commission, Chair of the Professional Development Committee, and member

of the NACADA Board of Directors. Folsom earned a BA in 1969 from Ohio Wesleyan University and an MLS from SUNY, Geneseo in 1973.



Franklin Yoder has been at the Academic Advising Center at The University of Iowa since 1992. He is currently an Associate Director at the Advising Center where he is responsible for new advisor training. In the past several years, he has been involved with NACADA: The Global Community for Academic Advising by leading workshops for new advisors, co-presenting a webinar on advising theory, writing monograph chapters, and presenting at sessions on training and technology and other related topics. He received his PhD in history from the University of Chicago and also serves as an adjunct professor in the History Department at The University of Iowa.



Jennifer E. Joslin was appointed the Associate Director for Content Development of NACADA: The Global Community for Academic Advising in September 2013. She

had served as the Director of the Office of Academic Advising at the University of Oregon and as the Senior Associate Director for Training and Development at the University of Iowa. Joslin is a Past President of NACADA and former board and council member.

In addition to serving as Coeditor for the second edition of the *New Advisor Guidebook* along with Pat Folsom and Franklin Yoder, Joslin coedited, with Nancy Markee, *Academic Advising Administration: Essential Knowledge and Skills for the 21st Century* (2011).

In 2012, she was awarded a University of Oregon Officer of Administration award acknowledging inspired leadership and commitment to fostering an inclusive campus climate. In 2011, she was awarded the NACADA Region 8 Advising Administrator Award, which recognizes demonstrated excellence in advising administration.

Joslin has presented at regional and national advising conferences, consulted at institutions in the United States and Australia, and presented three national webinars for NACADA on the topics of social media, LGBTQA issues, and advising administration. She has written for the *NACADA Journal* and several NACADA books including *Advising Special Populations* (2007); *The New Advisor Guidebook (1st edition)* (2007); and *Comprehensive Advisor Training and Development* (2011). In addition, she has served on the Content Review Boards for the *Academic Advising Handbook (2nd edition)* (2008); *Academic Advising Today*; and *Foundations of Academic Advising CD 3: Understanding Cultural Identity and Worldview Development*.

Joslin currently teaches graduate courses in the Kansas State University College of Education in the Department of Counseling and Educational Psychology. A native Californian, Joslin received her PhD from the University of Iowa in 2002. She is a proud member of the Jane Austen Society of North America. Tweet (@jenniferejoslin), befriend, and connect with her at <http://about.me/jenniferjoslin>.

