Improving Communication for Effective Advising: A New Training Program

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Abstract

This professional project, guided by Communication Privacy Management theory, Myers and Oetzel's Organizational Assimilation Index, and recommendations from NACADA, sought to make improvements and additions to Southern Utah University's academic advising model and the training in place for advisors. The project produced three deliverables: a CPM-based holistic communication model, a personal advising and career philosophy workshop, and a model for ongoing annual training for all advisors.

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Signature Page

I certify that I have read this project report and that, in my opinion, it is satisfactory in scope and quality as a project for the degree of Master of Arts in Professional Communication.

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Improving Communication for Effective Advising: A New Training Program

A recent national student satisfaction report revealed that students enrolled in 4-year public universities consider academic advising to be the most important area of their student experience (Ruffalo Noel Levitz, 2017, p.8). In response to this trend and the data made available to administration, Southern Utah University (SUU) recently made the decision to make advising a much larger priority. Over the course of five academic years, SUU advising transformed, both in the overhaul of outdated advising practices as well as the hiring of additional advisors to nearly double the staff. However, as more advisors were hired and the generational makeup of the student body changed, the model of and practice within advising at SUU needed further updates to focus even more on the holistic needs of students, as well as the training needs of advisors, to better serve SUU's goal of continued student retention.

This professional project designed a more effective training program for new and developing advisors at SUU. Three deliverables were created: the first deliverable is a set of new and updated training modules for the intensive four-week new advisor onboarding program, including a new communication-focused holistic advising training, guided by Sandra Petronio's Communication Privacy Management Theory (2000), that is designed to help advisors gain and improve skills in making meaningful connections with their cohorts. The second deliverable is a one-time advisor training on creating a personal advising philosophy, with the goal of better connecting advisors to their purpose, goals, and reason for choosing this career path. The third is a model for ongoing quarterly training events for all new and veteran advisors. Deliverables two and three are designed to support organizational assimilation for advisors, especially when considering Myers and Oetzel's dimensions of organizational assimilation, two of which include job competency and adaptation or role negotiation (2003).

These resources are a valuable development for SUU Advising. Prior to July 2018, training within advising was seen somewhat as an afterthought. A more robust training program was created in 2018 as a result of a small committee that gathered to support the four new advisors that would begin that summer. However, even that training lacked clear goals and direction, and little to no support was provided for ongoing development in advising at that time. This newly improved model has roots in publications and suggestions from NACADA: The Global Community for Academic Advising, and is clearly tied to the goals listed in the SUU Advising Unit Effectiveness Plan (UEP) of having truly meaningful interactions with SUU students. The improvements and development of these resources should lead to stronger relationships between advisors and students. And, because academic advisors have the ability to reach nearly every single student in a university over the course of the academic year (White, 2015), these more impactful connections also may, in time, positively impact retention of students at SUU.

Literature Review

Communication Privacy Management (CPM)

Communication Privacy Management (CPM) theory was chosen as the guiding theory for this project because of the goal of advisors to build relationships with students through disclosure and conversation, which is a large focus of CPM. CPM was developed starting in the 1980s by Sandra Petronio. The theory was sparked by Petronio's research on self-disclosure, based on Irwin Altman and Dalmas Taylor's Social Penetration theory (Taylor & Altman, 1975). Petronio was most interested in the why of disclosure in general, and took some of the facets of Altman and Taylor's work in an attempt to improve upon them (Petronio, 2004).

CPM, at its root, discusses the pattern of decision-making surrounding individuals' choices to disclose or conceal private information. Sandra Petronio created CPM in response to her desire to create a model of self-disclosure that "assumed that others are also central to discerning the tension between public and private" (Petronio, 2002, p. 2). Her theory is designed around three elements that provide a basis for understanding individuals' management of their private information. The first element is privacy ownership, or, who is the owner of private information. The second element of the theory is privacy control, or the idea that people have criteria and conditions under which they will choose to grant or deny access to information. The third element is privacy turbulence, where boundary rules are tested and sometimes broken (Petronio, 2013).

Often, in regards to boundary rules, Petronio found (2013), "These rules are derived from decision criteria such as motivations, cultural values, and situational needs...These criteria can be categorized into two types: *core criteria* and *catalyst criteria*" (p. 10). Core criteria are the stable and predictable factors surrounding the disclosure of private information, and don't tend to change based on the situation. Catalyst criteria are concerned with the reason that a rule may change, whether based on a situation or new information coming to light that changes the typical pattern a person may follow with their disclosure of private information.

CPM provides a base point for many interesting studies regarding disclosure, especially disclosure in a higher education environment. A few studies have touched on the patterns and effectiveness of faculty and advisors' disclosures to students (Schrodt, 2013; Thompson, Petronio, & Braithewaite, 2012; Hosek & Thompson, 2009), as well as students' willingness to disclose private academic information to the faculty over their courses (Henningsen, Valde, Entzminger, Dick, & Wilcher, 2019). These studies have provided a solid basis for the understanding that disclosure is a complex concept, but there are patterns that can be identified. There has been a dearth of previous research, however, on students' private disclosures, whether academic or personal in nature, to academic advisors specifically.

Academic advising and student disclosure

Academic advising is a critical part of a student's success in a college or university setting. NACADA stated that one role of advising is to help students learn to "become members of their higher education community, to think critically about their roles and responsibilities as students, and to prepare to be educated citizens of a democratic society and a global community" (2006, paragraph 5). Another recent study stated that advising can be seen as "a means of helping students become effective lifelong learners, while also optimizing their capacities for both personal and career success" (Read, Hicks, & Christenbery, 2017, p. 82). With these overarching concepts in mind, a common goal of advising practices across the country is not just advising in general, but promoting student satisfaction and creating meaningful relationships (Vianden, 2016).

Effective academic advising has been linked many times to overall student satisfaction, retention, and persistence to graduation (Vianden, 2016; Vianden & Barlow, 2015; Bowden, 2011; Lynch & Lungrin, 2018; and White, 2015). One specific study even found that due to the implementation of an effective advising model, retention grew by 1.7% in just one year (Polnarieve, Jaafar, Hendrix, Morgan, Khethavath, & Idrissi, 2017). There are many potential reasons for the impact that advising has on student success. Some studies believe that one of the most important things advising does is that it "links students to their institutions" (Vianden, 2016, p. 20; Vianden & Barlow, 2015). Another possible reason that advising impacts student success is through the actual relationships that advisors build with the students (Lee, 2018; Cheung, Siu, & Shek, 2017; White, 2015). Soria, Laumer, Morrow, and Marttinen found that "when they can more quickly develop personal relationships with academic advisors… students may feel more engaged because they feel validated and supported by critical institutional representatives" (2017, p. 63). Other possible reasons for advising's impact on students include the way advising supports overall student learning (NACADA, 2006; Zarges, Adams, Higgins, & Muhovich, 2018; Ranglund, Danielsen, Kionig, & Vold, 2017), provides encouragement in addition to solving problems (Lee, 2018; Vianden & Barlow, 2015; Khalil & Williamson, 2014), and is "capable of reaching every single student enrolled at an institution, a claim not easily made by any other enterprise on a university or college campus" (White, 2015, p. 269). Whatever the reason, the research is clear: advising does positively impact student success.

At its start, advising existed largely as an additional faculty responsibility, to help ensure that their students in their majors would graduate in a timely manner and find success after graduation (Burton, 2016). While this was effective at the time, as generations have moved through university and advising has made its way towards the forefront of services offered by higher education institutions, advising has had to make a shift to better meet the needs of the up and coming generations. The common theory in academic advising today and over the last couple of decades is developmental advising. Developmental advising acknowledges the whole student, not just their academic success in classes, and works with the student on issues beyond class registration (King, 2005). At SUU, this is referred to as holistic advising, or advising to the whole student and is measured in meaningful connections and interactions between advisors and their students.

In the advising office at SUU, one of the main goals is to interact with all students in a meaningful way during each calendar year. Meaningful interactions have been defined by SUU's advising office as interactions that go beyond a transactional or prescriptive model of advising, and instead, check in on the holistic needs of the student, because "addressing holistic student needs and concerns beyond enrollment has a positive impact on a student's ability to navigate college" (Lynch & Lungrin, 2018, p. 70-71). However, holistic needs cannot be addressed if advisors do not know what those needs are. As an additional difficulty, noted by Joyce and Weibelzahl in 2011, students tend not to practice help-seeking behaviors on their own without a nudge, and even when presented the opportunity, in an appointment designated to help address their holistic concerns, do not always disclose personal information that an advisor could use to help the student as much as possible.

It is for this purpose that further training on effective communication and relational skills has been created. A pilot study was conducted at SUU in 2019, and revealed that for the most part, SUU students would be willing to shift their typical boundary rules and share more private information with advisors if there were certain relational, situational, and environmental factors present at the time of an appointment. While not all of these factors are within an advisor's control, some of them can be impacted by simple changes on the part of an advisor to focus more heavily on stronger interpersonal skills, as well as identifying with students what their boundaries are, which is an important factor in CPM. Because of the importance of meaningful interactions and connections, a new module within advisor training is dedicated solely to effective relationship-building and holistic advising, using CPM as a guideline for encouraging rich and relevant disclosure from students. The new relational training introduces advisors to the CPM concepts of boundary rules and decision criteria for making such rules, as well as the concept that a student may, even subconsciously, need time to determine the risks versus the benefits of disclosing private information (Petronio, 2013).

Organizational assimilation

One additional benefit that SUU Advising hopes to gain from these resources is greater retention of advisors, as well as students. Because advising has often been considered an entry point into higher education, it has a propensity towards higher turnover than many other roles. At SUU, advising has historically struggled to retain an advisor longer than two to three academic years. This trend comes at a detriment to students, and has, in fact, become a major source of dissatisfaction via advising's annual student satisfaction survey. Students care about connecting with their advisor, because they know the benefits that the relationship can bring them. To combat this trend of advisor turnover, attention was turned first to more effective organizational entry and assimilation.

While organizational entry has been studied for many years, Myers and Oetzel's 2003 model, the Organizational Assimilation Index, really serves to help organizations focus on the most impactful details so that they are able to "orient and mold recruits into productive organizational members" (p. 438). Organizational assimilation is essentially the next step in the socialization process of a newcomer, after the initial organizational entry. Myers and Oetzel find assimilation to be a "useful aspect of newcomer entry because becoming an effective member of an organization involves...both organizations and newcomers" (p. 439). They identified six dimensions of organizational assimilation: familiarity with others, acculturation, recognition, involvement, job competency, and role negotiation. Where these dimensions are present and focused on, organizational assimilation will be higher, and "employees may demonstrate higher levels of organizational identification and job satisfaction" (p. 451), which are both negatively related to an individual's desire to leave the organization.

Outside of Myers' and Oetzel's factors, there are a multitude of other concepts that impact an individual's entry and assimilation process. Schaubroek, Chunyan Peng, and Hannah (2013) studied the impact of newcomers' development of trusted relationships with peers and supervisors as related to their assimilation and identification with an organization. Their research revealed that newcomers will naturally place a certain amount of trust in those around them based on the situation in which they find themselves, referred to as cognitive-based trust. But over time, as opportunities are provided for positive exchange within a relationship, affect-based trust may be built. This is imperative, because, as Schaubroek, Chunyan Peng, and Hannah found, “relationships characterized by high affect-based trust with peers and leader were both found to influence increases in organizational identification” (2013, p. 1163), relative to the time spent together during the entry period. This leads to the idea that it is critical for newcomers to interact with multiple individuals during their entry period, not just a single trainer or supervisor, so that there are greater opportunities for strong relationships to be built.

An additional area that impacts organizational entry and assimilation is that of sensemaking, information-seeking, and proactive uncertainty reduction by the newcomer. The general idea is that information needs to be readily available in an appropriate format for newcomers to help reduce the anxiety that organizational entry creates. That appropriate format includes not just training, but, as suggested by De Vos & Freese in 2011, socialization with a variety of individuals so that they can truly make sense of the complexity of their role within the organization. The more opportunities that newcomers are given to ask role-related questions during initial onboarding, the better. Additionally, the greater the involvement from the newcomer in their own information-seeking, the better; greater interaction in this process has been linked to greater job satisfaction (Mignery, Rubin, & Gorden, 1995; Saks & Ashforth, 1997). De Vos & Freese (2011) also revealed that while it is important for a newcomer to have the opportunity to build relationships with peers, mentors, and other newcomers, their information-seeking from those individuals is highest for the initial weeks, and not the months ahead. On the other hand, they continue to seek information from their supervisor consistently over time, so a strong relationship or the opportunity to build one should be established early on with the supervisor. In short, the opportunities presented to the newcomer to gain information from a variety of sources as early on as possible is a strong way to ensure job satisfaction, which leads to greater organizational assimilation overall.

The creation of individual advisor philosophies is also aligned with a greater focus on organizational assimilation, as it helps to connect an advisor with the organization and understand their purpose within it. Schaubroek, Chunyan Peng, and Hannah showed that “a collective identity, characterized by a tendency for memberships in collectives to influence self concept, builds affective commitment to an organization” (p. 1162), and that commitment relates directly back to organizational identification, or “a member’s perception that the organization’s values and interests are of primary concern with evaluating decision alternatives” (Myers & Oetzel, 2003, p. 441).

Even more specifically focused into student affairs in higher education is the concept found in Hirschy, Wilson, Liddell, Boyle, and Pasquesi’s 2015 article, of developing a professional identity. According to their study, a professional identity helps tie a new professional more closely to their new role and how they will behave as a new member within the profession they have chosen, and can deeply strengthen one’s commitment to the work. David Freitag with NACADA, in 2011, described a personal advising philosophy as a document that gives clarity to their day-to-day work, notes their inspiration and reasons for entering the field, and connects them more deeply to their career goals within the organization. These qualities connect the exercise closely with factors that promote strong organizational affiliation, especially Myers’ and Oetzel’s factors of acculturation, job competency, and role negotiation.

Effective training and ongoing professional development

The creation of new and updated training and development materials is designed to help advisors at all levels improve their skills. In SUU’s unit effectiveness plan (UEP) for advising, there are six goals for the advising team to work towards, and each of those goals could be supported by training, if it is done well. Effective, high quality training has been shown over and over again to have a positive impact on performance (Mpofu & Hlatywayo, 2015; Gupta, 2019; Zha, Adams, Calcagno-Roach, & Stringham, 2017), the perception of and satisfaction with service delivery (Gupta, 2019), and even the attitudes of employees towards the organization (Karaaslan, 2013; Kang, Gatling, & Kim, 2015; McCluskey-Titus, Cawthon, & Helms, 2019).

A lack of attention to or prioritization of training can be a definite detriment to all industries. Mpofu and Hlatywayon (2015) found that the poor perception of service by one municipal sector was due to poor performance, by employees and management that were just not effectively trained. They found after implementing training and development requirements, that improvements were quickly made, and attributed largely to the program. They wrote, specifically, “Improved, efficient and effective service deliverance, by municipal employees, can be achieved if they are trained and developed in programs of a high standard and which are administered by facilitators who produce work of a high standard” (p. 135). This speaks volumes to the benefit of training generally, but especially the benefit of high quality training.

High quality training tends to come at a high price point, and a concern voiced by many is that it not only requires funds but also time, which is an invaluable resource in any organization. However, Karaaslan said it well in 2013: “Competition is increasing all over the world...one of the most important aspects of competition is qualified personnel. Therefore, investments that are made for the training of personnel will be appropriate for the demands of a changing world” (p. 269).

One way that industries are capitalizing on the investment of training is by involving technology in the training process. Technology not only provides the opportunity for asynchronous learning that can be done at the convenience of its users, but also saves the time of those who would have been involved in more of the face-to-face training. Banking is one industry that has picked up e-learning and other technologies and really ran with them. In a 2013 study on the use of e-learning, Karaaslan noted that "because e-learning provides opportunities for learning without interfering with the flow of work for the staff working at the appropriate time and space, an economic advantage is provided both to the [company] and its employees" (p. 269). For this reason, and due to the high amount of time that advisors spend on the computer for their day-to-day job, a portion of the advisor training does involve e-learning. But, as Karaaslan's study also recommended, that e-learning is also supplemented with high socialization and interaction with others.

Focusing on creating interactive and social parts of training is another way to ensure effective training. This socialization should come through multiple sources. If using e-learning, that technology is most effective when the user can interact both with the software and with others around them to supplement their learning (Karaaslan, 2013). In training new employees, an interaction with others is especially important as it creates the familiarity with others (Myers & Oetzel, 2003) that is so critical for organizational assimilation. In addition to interaction and a social component in general, it is specifically helpful and necessary for interaction, involvement, and support from a supervisor. Kang, Gatling, and Kim (2015) found that when supervisors interact with an employee regarding their overall development and provide their support, frontline employees tend to be more committed to their organization.

The previously referenced studies all focused on training and development in general. Higher education, in many aspects, is its own beast, especially in student affairs, as the new employees entering the organization are highly educated, but must still start with the basics to be the most effective they can be. Looking to research relating to training in higher education specifically, one recommendation is to ensure that training and development opportunities are truly impactful, and designed specifically for their audience (Al-Mzary, Al-rifai, & Al-Momany, 2015). Al-Mzary, Al-rifai, and Al-Momany (2015) also found that the attitude of employees toward training matters. The more positive the attitude going in, the more benefit the training will have. The authors found that the most positive attitudes were present when training was intentionally designed for its audience, and provided for audiences that had not always had the opportunities available to them. This also requires an acknowledgement of prior knowledge, and ensuring that those with prior knowledge in an area are served just as much as those who do not. Zha, Adams, Calcagno-Roach and Stringham (2017) found, going into a training experience, that those with some degree of prior knowledge in a content area were more effectively able to navigate through a training scenario than those who did not. They also noted, quite positively, that those with prior knowledge were also more willing to get involved with others and share their experiences and ideas with the subject. This ties very well back to the concept of socialization in training, and ensuring that training is never taking place on an island, as the phrase goes.

In student affairs in higher education, it is important as well to ensure that training is seen and treated as a priority, enough so that participants can tell that it is important to their organization. One interviewee from residential life noted that the bulk of training and development takes place when students are moving in and out, or there are other events happening, instead of allowing training to be the sole focus. “The implication here is that training is not the top priority as it once was previously, when staff could dedicate full time to training activities” (McCluskey-Titus, Cawthon, & Helms, 2019, p. 24). This emphasis on prioritizing training experiences is one that the advising office at SUU has not taken lightly.

Finally, another characteristic that separates training in higher education from training in other industries is the focus that even employee training has on outcomes and competencies. Aloi, Green, and Jones (2007) found that the best way to ensure that employee training and development represents the university’s dedication to effective learning is to implement assessment even into the division of student affairs. For training to be as effective as possible, measurement tools must be built in. The UEP provides a strong place to begin measuring and assessing this group.

Given all of the information gathered, creating new and updated training resources for the SUU advising office is an impactful way to provide an appropriate focus on improvement. Where training can support organizational assimilation and improved relationships with customers, an improved and effective new advisor training program, as well as multiple longer-term development tools provide an opportunity for the team to continue to contribute positively to the university's retention efforts and meet the department's UEP goals.

Method

This project was threefold, and involved the creation of three distinct deliverables. The first was an updated and improved training in the Canvas learning management system, involving the addition of new and more effective content for advisor training guided by Communication Privacy Management theory. The second was the design of a one-time advisor training on creating personal philosophies of advising. The third was a plan or system to model ongoing quarterly development opportunities for advisors.

These training and development tools were all designed based on a series of effective components introduced by Jeffrey McClellan with NACADA in 2007. According to his article, which builds on other NACADA publications (Habley, 1987; Higginson, 2000; Nutt, 2003), the three most critical components of effective advisor training are conceptual, informational, and relational. Additional areas of consideration that are not discussed in this report include technological and personal components.

Conceptual training components are those that give information that helps advisors "establish role clarity, develop a common understanding of advising, and nurture the emergence of a shared culture" (McClellan, 2007, paragraph 4). All three of the deliverables of this project rely heavily on conceptual components of training, especially where the role clarity comes into play. Tying back to Myers' and Oetzel's dimensions of organizational assimilation (2003), these conceptual training components best support the role negotiation dimension.

Informational training components include fact-based content, such as the policies, procedures, and program requirements that advisors must be able to communicate to their students. According to Higginson (2000), the information that advisors need to know fall generally into four categories. Internal environment information includes institutional information and more specific program information for students. External environment content involves information that helps students link their institutional experiences with life outside of college. Information on student needs is the third category and includes content relating to special student populations, student development theories, and the demographic information that can help shape advising goals and perspectives. Finally, advisor self-knowledge is important, as it helps an individual advisor know what background information and content they are bringing into a session with a student, and helps them focus on their own competencies. The new advisor training modules will be heavily focused on informational training components. Some of the quarterly trainings will also be informational in nature.

A third focus of effective advisor training is the relational component. Higginson (2000) described the relational component in this way: "The focus of this training component is for the advisor to convey effectively the understanding and knowledge obtained from the other components by establishing a personal relationship with the student advisees through demonstrating appropriate advising behaviors" (p. 305). This relational piece is a large focus of the new advisor training modules, and is where the correlation to CPM is made. Quarterly trainings have been planned to also include relational components, and ideally, each individual advisor philosophy will include relational ideology as well.

The three training deliverables use these NACADA best practices, theory-guided recommendations, and information found in policies and procedures already in place at SUU. Each training also serves to help meet the goals in advising's most recent Unit Effectiveness Plan. The method and design for implementation of each deliverable is outlined in the following sections.

New advisor training

Modules for advisor training have existed at SUU since 2015, when they were created by the advising leadership team. While these modules were an effective place to store information, they were not an effective learning tool, as they were not integrated into the other parts of a new advisor's introduction to the job. The e-learning was not supported by discussion, or even checked by anyone to ensure it was completed. The modules also required constant updating of information, and once the original creator of the content left the advising office, the modules were left untouched for some time.

This project sought to fully overhaul the existing modules to make them a more effective training tool. This took four steps: the reorganization of the current training schedule to provide just in time knowledge as new advisors should learn it, the update of e-learning modules with accurate and up to date information, the integration of the e-learning modules with face-to-face training, socialization, and supervisory support, and the addition of a new module to support a more robust relational training initiative.

The original training schedule was organized in a way that the e-learning could be conducted entirely separately from anything else a new advisor was learning or doing. For this purpose, the modules were grouped by content area. This was not a poor method of organization, but as Karaaslan noted in 2013, e-learning is most effective when conducted in an interactive environment, where the user can interact both with the software and with others around them to supplement their learning. He noted, “Individual and group learning in the workplace requires high social activity like interaction, dialogue, reflecting on past experiences, and future planning activities” (p. 271). While much of this could be done through a module alone, it is more effective when learned in a way that could involve the trainees’ more veteran colleagues and valued others in the campus community. Cutler (2003) found that “the importance of connecting to others in student affairs is crucial to fostering one’s professional identity” (p. 174).

For this reason, the modules were reorganized based on the order in which face-to-face trainings or other social experiences would take place. For example, in a new advisor’s first week, they need to learn about relevant technologies by attending face-to-face trainings where they have the opportunity to test systems and ask questions in person. In the e-learning, their face-to-face training is followed and supplemented by a module including reflection questions and practice scenarios, as well as some information to refer back to as questions arise. A detailed example of a face-to-face training schedule is included as Appendix A. Where face-to-face training experiences must be scheduled with the appropriate individual, each new advisor training session may be different than the last, and for this purpose, the e-learning portion of training is structured so that any topic or module can be rearranged in the timeline to fit more appropriately with the face-to-face training experiences.

The update of modules with new and corrected information is a perpetually ongoing task. For this reason, most of the new e-learning modules refer participants directly to the website associated with the topic about which they will be learning, so that factual knowledge is always able to come from the source. The only additional information that is included in the updated modules is how each of those resources relates to their role as an advisor. For example, there are often changes in staffing in the Veteran Center at SUU, but the role of advisors in relation to the center changes much less often, so the module is able to include the role-related information, but direct advisors to the center's website itself for accurate staffing and contact information.

As mentioned previously, one of the purposes for the reorganization of training content was to match it more carefully with face-to-face training, socialization opportunities, and the supervisory support that is critical for success in organizational entry (De Vos & Freese, 2011; Kang, Gatling, & Kim, 2015). De Vos and Freese (2011) stated that the anxiety related to organizational entry can be reduced when more information is provided from a large variety of sources. To more effectively achieve this goal, trainees will be trained by and debrief with not only other new hires, but also their more veteran colleagues, as well as supervisors, called lead advisors. One important factor that was lacking in the original training was the establishment of a connection between the new advisor and their lead. As can be seen in the sample training schedule in Appendix A, there are more intentional opportunities for leads to check in with new hires and discuss their training experiences in the context of the big picture.

The last change to the new advisor training was the new relational advisor training, guided by Communication Privacy Management and the pilot study conducted at SUU in 2019. The content for the module was based around the goal of providing new advisors with theoretical knowledge and practical skills to be able to establish effective advising relationships with students. McClellan (2007) stated that relational training might include topics such as building rapport, interviewing, and listening skills. He also noted, "Such topics involve much less information sharing by trainers and more skill-development oriented training methods such as role playing, action learning, shadowing, and case studies" (paragraph 11). The new e-learning module, titled "Holistic Advising and Relationship Building" (see Appendix B), follows the topical guidelines and is also aligned with face-to-face exercises in role playing and shadowing.

The module begins by introducing the SUU Advising UEP goals relating to making meaningful connections with students, and discussing the recommended method for making connections: holistic advising. The module then discusses CPM as a theoretical approach for understanding holistic student disclosure and relationship-building. Finally, practical techniques and skills are discussed, many of which are based on the findings from the pilot study, and homework is given to shadow other advisors. The training is followed up by a discussion with a mentor advisor or supervisor of what holistic advising and meaningful connections mean to the new advisor, based on their new experiences and knowledge.

Advisor philosophy

The Advisor Philosophy Workshop was created based on a multitude of recommendations from NACADA. As the workshop started to take shape originally in March 2020, progress was interrupted by the onset of the COVID-19 pandemic and its impact on the SUU Advising team. At the conclusion of the Spring 2020 semester in late April 2020, the workshop was shelved, as professional development did not appear to be an option, nor would a workshop be feasible given the constraints surrounding the pandemic.

However, in mid-July, the SUU Advising leadership team began to do some work and research on the concept of burnout in human services professions. Among some of the research were studies that supported mindfulness and intentionality as having a positive impact on burnout (Harker, Pigeon, Klaassen, and King, 2016; Varona, 2018; Park and Nam, 2020), as well as some studies that referenced role conflict versus role clarity as a strong predictor of burnout (Park and Nam, 2020; Salyers, Watkins, Painter, Snajdr, Gilmer, Garabrant, and Henry, 2019). In fact, as the 2019 study revealed, “Role clarity emerged as being related to each of the three components of burnout, and was the only clear predictor of change in burnout...One practical implication for managers is to ensure that role responsibilities are clearly defined” (Salyers et. al., p. 981).

With a renewed focus on bringing advisors back to a sense of purpose and role clarity, as well as supporting organizational assimilation as originally designed, the advisor philosophy workshop was defined. The workshop focused on NACADA recommendations made by David Freitag in 2011. Freitag noted, “Awareness of one’s own personal philosophy of academic advising enables the advisor to examine and improve their relationships with and the outcomes for students” (2011, paragraph 5). He recommends further that the document, once completed, should contain details such as the advisor’s approach to student interactions, their goals for the future, their career-related values, and even their “reasons for entering the field” (Freitag, 2011, paragraph 2).

The workshop followed these guidelines closely. It was broken up into three distinct parts. The first asked participants to reflect on their reasons for entering into this career pathway. The second helped participants reflect on their career-related values. The third provided a series of prompts to help participants define the other important details such as advising style, how they view their role, etc. To encourage participation from the workshop attendees, the workshop design employed discussion, writing activities, and video as a visual aid. Additionally, a participant packet was created (see Appendix C), as well as a trainer script so that the workshop could be run again in the future (see Appendix D).

Ongoing training calendar

Creating a calendar or guide for ongoing training was a final quick addition to this project. Discussion with current advisors revealed that most, if not all, would be highly interested in more training and development opportunities of some kind. While sending advisors outside of the organization to be trained presents a budgetary issue, especially in the midst of the COVID-19 pandemic fallout, hosting some in-house training opportunities could provide advisors the chance to learn more and feel that their development is a priority.

Voller, Miller, and Neste with NACADA wrote in their 2010 book, *Comprehensive Advisor Training and Development: Practices That Deliver*, “Advisor development addresses the emergent needs of the experienced advisor...it also promotes continual advisor growth in the foundational components and encourages professional involvement” (p. 25-26). With this in mind, the proposed schedule for continuing training and development suggested quarterly trainings, with each focusing on one of the essential components for advisor training. The outlined trainings also focus on ensuring UEP goals are met, as each of the goals fits under one or more of the categories of conceptual, relational, or informational training concepts.

Results and Discussion

This project was more of an undertaking than was originally intended. There was an unexpected amount of work involved in the first portion of the project, and what was originally desired - a complete overhaul of old training content, and the addition of new content - was pared down to just the addition of a new module, guided by Communication Privacy Management, the 2019 pilot study conducted by the researcher, and SUU Advising UEP goals. The other components had the intended result.

The new holistic advising module hopes to introduce new and early-career advisors to some practical concepts that will increase their skillset, but also help them increase their job competency and role clarity, given an understanding of how these day to day skills they will use affect the mission of the unit, and support the mission of the university. While there will not be any new advisors hired for some time due to the hiring freeze brought on by COVID-19, a small group of advisors in their first year will be introduced to the training in Fall 2020.

The original plan for the advising philosophy workshop was to run the training during an advisor retreat during the Summer 2020 semester, due to COVID-19 restrictions, the retreat was postponed, and at the time of this publication, the workshop has not yet been conducted. However, the materials were distributed to the advising leadership team, and the content was approved as submitted, with a hope to run the workshop sometime during the Fall 2020 semester. The workshop will be framed loosely around the pandemic, to give a sense of urgency to the content.

In additional discussion with advising leadership, the creation of the workshop is coming at an opportune time, because the benefits go beyond the primary goal of bringing greater role clarity and job competency to the advising team. It was revealed that advising philosophies or other similar mechanics are actually a prerequisite requirement for many higher-level jobs in student affairs, and can be helpful as well in applying for awards. Additionally, the leadership team felt that the shared experience of a workshop would serve to bring a sense of team to a group that has been isolated for five months due to the pandemic. The group suggested that after the completion of the workshop, that the creation of an advising philosophy be integrated into the new advisor training. This will be included at a later date.

The final deliverable was a proposed outline for future training and development. For informational trainings twice a year, the recommendation is to bring in other campus resources and services to learn more about their offerings and what students can expect from them, or to engage advisors in a webinar from NACADA, the Utah Advising Association (UAA), or other national and regional groups of student affairs or advising professionals, to learn best practices from recognized organizations. Relational trainings should focus on improving advisors' abilities to create relationships with their students. Some recommendations include trainings on specific groups of students, such as students on probation or international students, role-playing and activity-based training, or webinars as mentioned previously. For conceptual training, the recommendation is to bring in leaders from across campus divisions to talk about the role advisors play in their area, as well as workshops similar to the advising philosophy workshop created for this project, to help give advisors a greater sense of the nature of their role.

While admittedly a larger undertaking than expected, this project brought to light some additional areas that the advising team at SUU could improve. Constant improvement and "perpetual learning" (Voller, Miller, and Neste, 2010, p. 24) are paramount in higher education, and while SUU's advising team has been approached by others for advice because of their success in aiding retention, it is good to acknowledge areas for improvement. Areas for potential future research include a quantitative analysis of retention data and advising appointments, qualitative analysis of advising appointment content to determine its effect on retention or student satisfaction, and analysis of campaign messaging that is sent out, to learn what content or type of messaging is most likely to elicit a response from a student. In addition, each deliverable will be reviewed and reassessed on an annual or semiannual basis for clarity, accuracy, and relevance.

There were a few expected limitations to this project. The timeline for the project was skewed greatly due to the worldwide pandemic and a necessary shift in priorities. There was not a budget available for the project; if there had been some resources available, there may have been video content included in both the e-learning module and the advisor philosophy workshop. This is something that may also be added, in the future.

Conclusion

This professional communication project, guided by theories in Communication Privacy Management and organizational assimilation, produced content for the advising program at Southern Utah University, to fuel improvements to their processes, greater buy-in from advisors, and more robust training for new hires. The project produced three distinct deliverables.

The first deliverable was an e-learning module for new advisors entitled, "Holistic Advising and Relationship Building." This e-learning module was guided by Sandra Petronio's Communication Privacy Management theory, and led as well by publications and guidelines from NACADA: The Global Community for Academic Advising. It also included interpersonal communication content, including recommendations from Kvale (1996) on active listening. In addition, this content was placed in the context of the overall new advisor training, and a more integrated schedule was created for this training that included more face-to-face support of e-learning content, as well as increased supervisor support, recommended by organizational communication scholars (De Vos and Freese, 2011; Schaubroek, Chunyan Peng, and Hannah, 2013).

The second deliverable was a workshop for advisors on creating a personal advising and career philosophy. This deliverable was also guided by NACADA recommendations, and supported by Myers' and Oetzel's dimensions of Organizational Assimilation (2003). The workshop was designed to foster a greater connection for advisors with their purpose, their role, and their future career goals.

The third and final deliverable was an outline and recommendation for future training and development opportunities. Recommendations were made in the three major areas of training content, defined by NACADA as conceptual, informational, and relational training components. The recommendations included appropriate potential content, and a timeline for training to be held. All deliverables at the time of this publication were not yet integrated, but had plans to be included within SUU advising beginning in Fall 2020.

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Appendix A

Sample Training Schedule

Day One Example Schedule:

- Settle into office
- Complete FERPA training, if not already completed
- Attend HR benefits orientation (scheduled by HR)
- Training Overview with Mentor
    - Introduce training binder and documents
    - Go over the schedule of the next four weeks
    - Discuss the three types of training components:
        - Conceptual - who are you, and what is your role?
        - Informational - what are the details you need to know, so you can effectively advise students?
        - Relational - how do you conduct an advising appointment and build a relationship with your students?
    - Introduce Canvas for e-learning portion of training (if access available)
- Computer and System Access Check
- Request Key and Fob (if needed)
- Get your Staff ID
- Have a tour of campus; cover relevant areas such as where other advisors work, where your department and college reside, location of a few common resources
- If possible (access-wise), complete Canvas module one - it discusses FERPA, introduces a few key people to know, and introduces/reinforces the role of advising at SUU briefly (Student Success Advisor vs. Academic Advisor, holistic advising, centralized model, mission statement). If not possible due to access, move to day two first thing in the morning.

Week One Events to Schedule:

- Initial Organization Training
    - Calendar Setup and Sharing
    - Binder organization for documents to reference during appointments
    - Google Shared Drive
    - Canvas introduction (if access was an issue on day one)
- MySUU Portal Introduction
- Slack Overview and Training
- Slack - Time to set up
- How to Shadow Effectively (Mentor)
- Review Shadowing Log (Canvas)
- Holistic Advising Training (Canvas)
- Link Training Part 1
- Link Reflection (Canvas)
- Intro to Catalog (Mentor)
- Catalog Reflection (Canvas)
- Major Resources Training (Mentor)
- Degree Works Training (and reflection/activity in Canvas)
- Meet with Team Lead

- Discuss UEP with Team Lead
- UEP Reflection (Canvas)
- End of Week One, Meet with Director of Advising
- End of Week One, Review with Mentor
- End of Week One, Reflection in Canvas

Week One Unscheduled Events:
- Shadowing
- Mock Degree Works Plans

Week Two Events to Schedule
- Meet Vice President of Student Affairs (and reflection in Canvas)
- Meet Associate Vice President over advising (and reflection in Canvas)
- Link Training Part 2 (and reflection in Canvas)
- Banner Training Part 1 (and reflection/activity in Canvas)
- Banner Training Part 2 (and reflection/activity in Canvas)
- Meet Dean, Department Chair(s), and Relevant Faculty
- Student Forms Training
- Mock Appointment Overview with Mentor
- Begin Resource Trainings, and follow up with associated reflection in Canvas:
    - Dean of Students
    - Career Center
    - Academic Probation and Tutoring
    - Disability Services
    - Student Support Services
- Advisor Training - Career Guidance (and reflection in Canvas)

Week Two Unscheduled Events:
- Shadowing
- Mock Degree Works Plans
- Schedule Mock Appointments

Week Three Events to Schedule
- Banner Training Part 3 (and reflection/activity in Canvas)
- BMI Training (and reflection/activity in Canvas)
- Argos Training (and reflection/activity in Canvas)
- Advisor Training - Foreign Languages
- Advisor Training - GE Advising
- Additional Resource Trainings, with associated reflections in Canvas:
    - Athletic Advising
    - Veteran's Center
    - International Affairs
    - Financial Aid
    - Financial Wellness
    - Student Completion (Withdrawal Support)

Week Three Unscheduled Events:
- Shadowing

- Mock Appointments

Week Four Events to Schedule

- Mentor Training - TTQs and Incoming Student Registration (and reflection/activity in Canvas)
- Additional Resource Trainings, with associated reflections in Canvas:
    - FYE and Orientation
    - ACES
    - Parent and Family Services
    - Health and Wellness Center
    - Center for Diversity and Inclusion
    - Non-Traditional Student Services
    - Student Involvement and Leadership
    - CAPS
- Take Career Assessment with Career Advisor (reflect in Canvas)
- Formal mentor discussion to determine readiness for solo advising

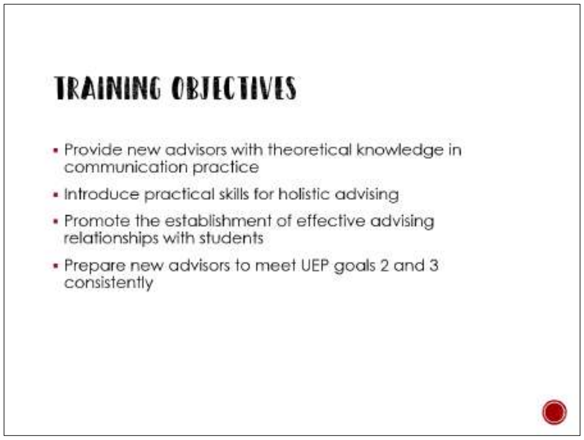
Week Four Unscheduled Events:

- Mock Appointments
- Reverse Shadowing with Mentor and others in content area
- Mock TTQ Plans

Appendix B

Holistic Advising and Relationship Building: Module Script

Slide 2

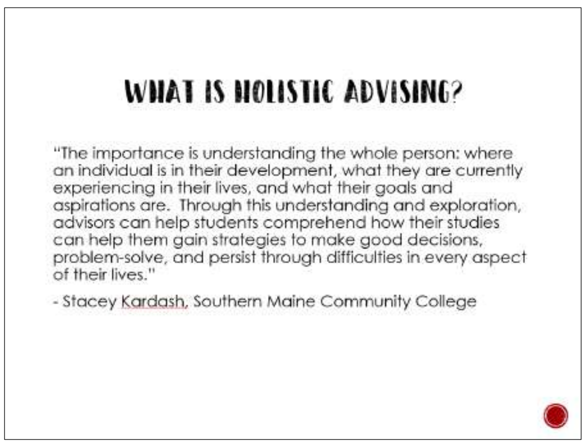


As you probably (hopefully) have heard around the team, at SUU, we practice holistic advising. In this module, you'll break down what holistic advising really is, and learn some techniques for how to make holistic advising work for you! We'll be combining information from the world of Communication, as well as from NACADA, the Global organization for advising. At the completion of this module, we will: provide new advisors with theoretical knowledge in communication practice; introduce practical skills for holistic advising; promote the establishment of effective advising relationships with students; and prepare new advisors to meet UEP goals 2 and 3 consistently.

Slide 3

First, what is holistic advising?

Slide 4



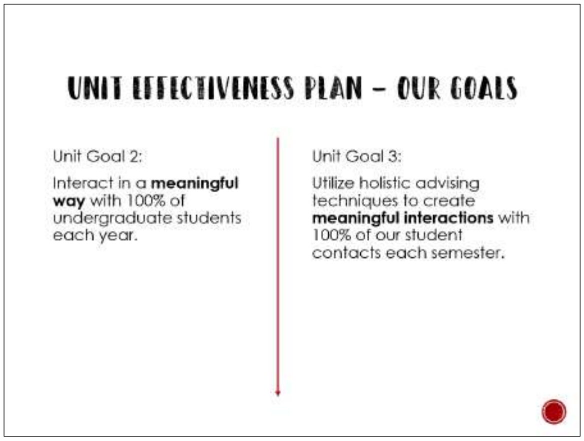
Holistic advising is as it sounds – advising to the "whole" person. Stacey Kardash from Southern Maine Community College put it this way:

> "The importance is understanding the whole person: where an individual is in their development, what they are currently experiencing in their lives, and what their goals and aspirations are. Through this understanding and exploration, advisors can help students comprehend how their studies can help them gain strategies to make good decisions, problem-solve, and persist through difficulties in every aspect of their lives" (2020, paragraph 2).

Slide 5

As we mentioned on your first-day module, we are "Student Success" Advisors, not just academic advisors, and that is because we are committed to the success of the whole student, not just their academic progress. As such, when we meet with students, we obviously want to meet their current academic needs (e.g., I need help planning my next semester schedule, or, I need a substitution form), but we also want to check in holistically to see how things are going for them.

Slide 6

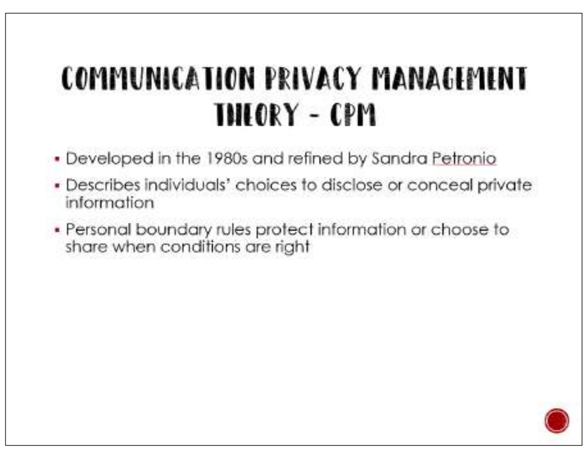


At SUU, we measure meaningful connections, because our research has shown that students are more likely to want to stay at their university if they have a connection made with one or more individuals on campus, not just peers, but people they may see as mentors or leaders. Our UEP goals 2 and 3 both specifically focus on the meaningful interactions we make with our students. Focusing on holistic advising is how we will make these meaningful connections with our students.

Slide 7

While you'll be able to walk into an appointment with some students and talk for 30 minutes naturally, with no training or thought whatsoever, you'll have other meetings with students in which it quite literally can feel like pulling teeth to get a conversation started. Because it is critical for students in both scenarios to have help and find a meaningful connection with advising, this training will focus on how to encourage disclosure when it isn't coming naturally. One way to do so is rooted in a communication theory, Communication Privacy Management theory.

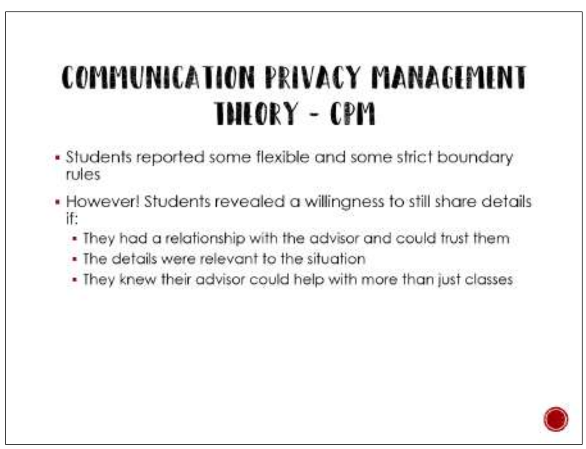
Slide 8



Communication Privacy Management (CPM) is a communication theory developed in the 1980s and refined through the last 30+ years by Sandra Petronio. CPM discusses the pattern of decision-making surrounding individuals' choices to disclose or conceal their private information. The theory focuses on the concept of individuals' boundary rules regarding their private information. People have specific criteria and conditions under which they will choose to either grant or deny access to personal or private information.

How does this relate to advising? When you have a student that has clammed up a bit, and is not wanting to share information, period, it is extremely hard to be the holistic advisor you were born to be. But, Sandra Petronio designed CPM as a theory that would help people **solve** their communication-related problems, not just observe them. As such, CPM has provided a base point for a lot of studies involving disclosure, many of which discussed disclosure in higher education. Building on these studies, one of your SUU Advisors did a pilot study in Fall 2019 to see what could be learned from SUU students and their willingness to share in an advising situation.

Slide 9



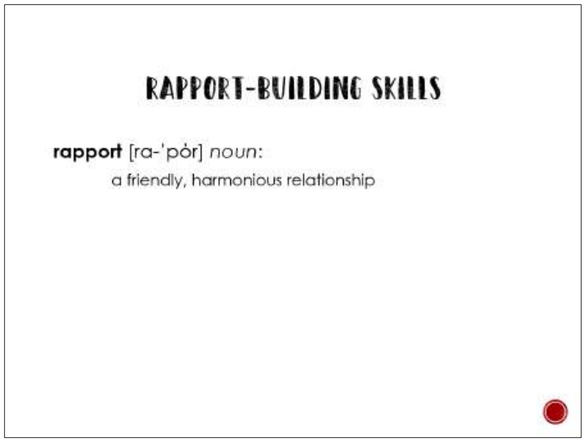
While the study was small, the findings were interesting. Students reported some flexible or light boundary rules around topics that were seemingly unrelated to the topic at hand (their education), and strict boundary rules surrounding certain topics, such as details about the past, intimate details about family, and health (both mental and physical). When in conversation, students revealed that they would and have shared more personal or private details about their life if they had a relationship with their advisor and could trust them, if the situation made sense for them to share those details, or if they knew that their advisor could help with more than just class scheduling.

The value that this has for you is that students are more willing to disclose private or personal information when it becomes relevant, but only to a trusted other that they see as a credible source. This is why it is so important to begin building those meaningful connections from day one.

Slide 10

Now that we've learned what holistic advising is, why it is important, and the stage we need to set with our students, let's talk about some specific skills we can use to make holistic advising happen. We'll cover some specific skills in the areas of rapport-building, listening and communicating, and "interviewing" skills, as well as give some general tips for how to set yourself up for success.

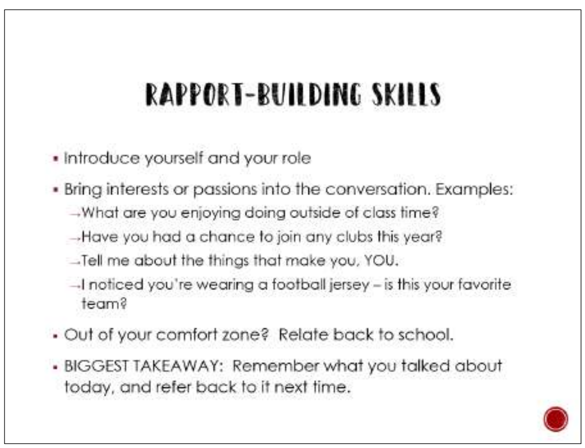
Slide 11



Let's start off with learning how to build rapport with your students. Rapport is a funny word – Merriam-Webster says that rapport is a friendly, harmonious relationship, especially a relationship characterized by agreement, mutual understanding, or empathy that makes communication possible or easy. This is exactly what we want!

So then, rapport-building is the process of laying the groundwork for that excellent relationship. Let's move into some tips on how to do this!

Slide 12



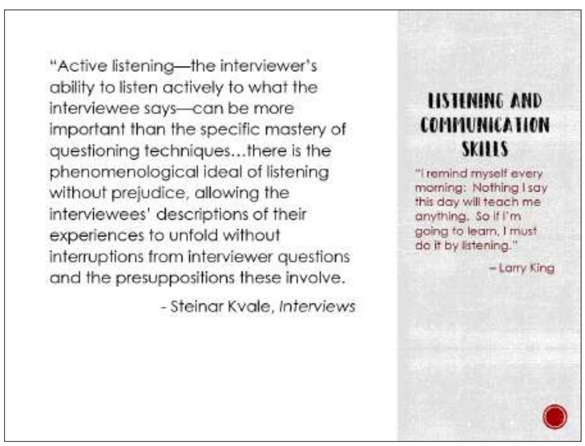
An easy and very effective way to start is with a new student (or new to you), simply introduce yourself! Don't be afraid to talk a little bit about who you are, your role as an advisor, even your interests.

Great advice from the customer service/sales world is to find a way to bring students' passions or interests into the conversation. Some great ways to start the conversation include, "What are you enjoying doing outside of class time?" "Have you had a chance to join any clubs this year?" "Tell me about the things that make you, YOU." Or alternately, "I noticed you're wearing a football jersey - is this your favorite team?"

Focusing on school-related things is also helpful, so that you're staying within comfort zones to begin with, especially when meeting with a new student. So, things like, what is your favorite class this semester? Why is that? Or, what is your favorite thing about being X major?

The most important way to build rapport in consecutive conversations, and one of the biggest takeaways of today's training, is to remember what you discussed. Use your previous appointment notes to your advantage; write down that they wanted to get a tattoo and ask how it went. Make a note about their favorite sport and ask if they've gotten to play at all lately. A little note and a few minutes of review can go a long way for reinforcing connections.

Slide 13

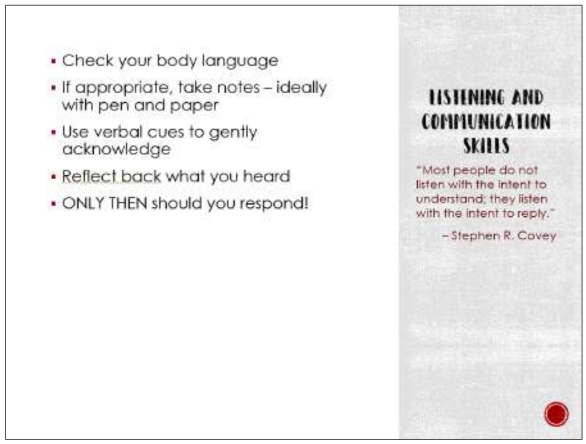


Don't underestimate the power of active/reflective listening! Kvale discussed the importance of active listening at length in his 1994 book, *Interviews*:

> "Active listening--the interviewer's ability to listen actively to what the interviewee says--can be more important than the specific mastery of questioning techniques...there is the

phenomenological ideal of listening without prejudice, allowing the interviewees' descriptions of their experiences unfold without interruptions from interviewer questions and the presuppositions these involve" (p. 132-135).

Slide 14

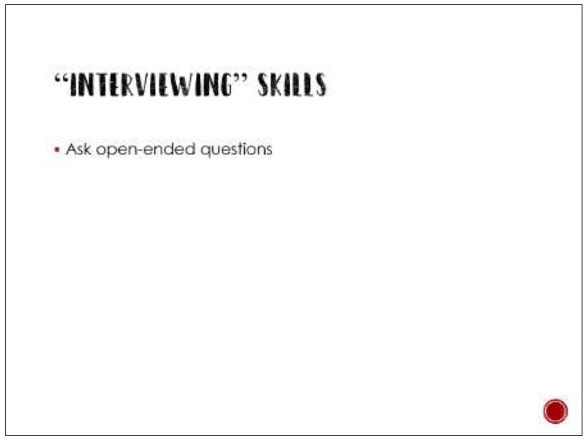


When actively listening, it is important to physically appear present with what the student is saying. Your body language should be open and show your focus on what they have to say. If appropriate, take notes, but you may want to use pen and paper, so as not to be distracted by the computer screen, or let the student know ahead of time that you'll be taking some notes during the appointment.

To take active listening one step further, to reflective listening, simply add the step of reflecting on what you heard from the student. This is particularly important after they explain to you their reason for wanting to meet, or describing anything detailed. Repeat back to them, in your own words, a summary of what they said and what meaning you gathered, and then ask something like, "Is there anything I missed, or any clarifications you'd like to make?"

Reflective listening is important because it helps your student feel understood and cared for, before any problem-solving takes place.

Slide 15



By "interviewing" skills, we are referring to skills in asking questions. While your advising appointment shouldn't bring on the nerves like an interview, it should follow effective questioning techniques, which we will discuss here.

One key interviewing skill to learn is asking open ended questions. While closed ended questions are not inherently bad, they don't leave as much room for listening, because to get good content out, you have to ask follow up questions. If instead, you ask the right question to start, this helps with allowing your student to take charge. This is SO HARD to master - let's practice. Here are some questions that are commonly asked in advising appointments - turn them into open-ended questions focused on the same topic!

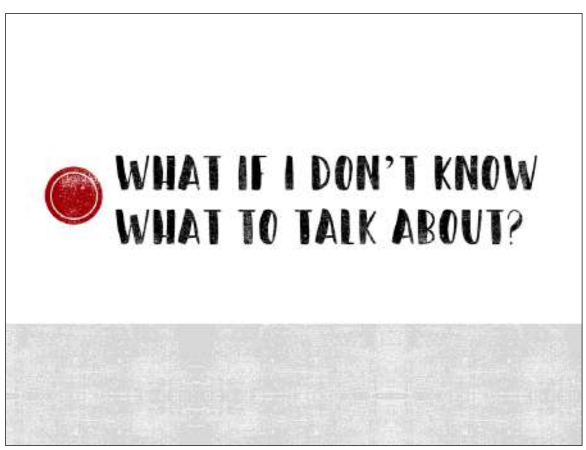
Slide 16

Another skill in interviewing is allowing your interviewee to take charge of the pace of your meeting. In their pilot study in Fall 2019, our advisor revealed that students appeared to share more when they controlled the pace of the meeting, deciding when and how they would move to the next topic. While yes, your student did arrive with a purpose in mind for their visit, if you allow them to decide when the getting to know you or rapport-building portion of the visit is done, you'll get a lot more out of it, and they'll make a stronger connection with you!

Another interview tip comes from the Communication Accommodation Theory by Giles and Ogay (2007). They discussed the way that individuals attempt to modify their communication styles in some way to be more or less similar to the other person. In this case, advisors can use Communication Accommodation theory to try to match the energy levels and speed of conversation that the student introduces, to ensure that the student is comfortable in conversation with you.

Finally, don't underestimate the power of reciprocal disclosure. If a student shares something, especially something that they might consider personal, private, or even shameful in any way, acknowledging their disclosure and thanking them for it, as well as sharing part of your own story can be immensely meaningful. It can also help with rapport-building, to connect even on the silly things - "You like Harry Potter? *I* like Harry Potter! What's your house?"

Slide 17

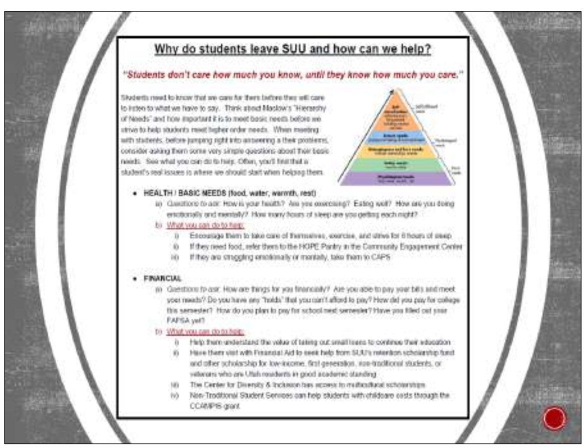


So, what should you do if you just don't know what to talk about? Sometimes, like I mentioned earlier, it can feel like pulling actual teeth to get conversation going sometimes. Other times, you might just not be feeling particularly inspired on a certain day and aren't sure where to begin. So, here are a couple of resources for you!

Slide 18

Here is a list of introductory, getting-to-know-you type questions that are helpful to have on hand. If you're unsure of what to ask, try some of these. Obviously, these are just a few of an endless number of questions you can ask your students, but hopefully they spark your creative brain a little bit.

Slide 19

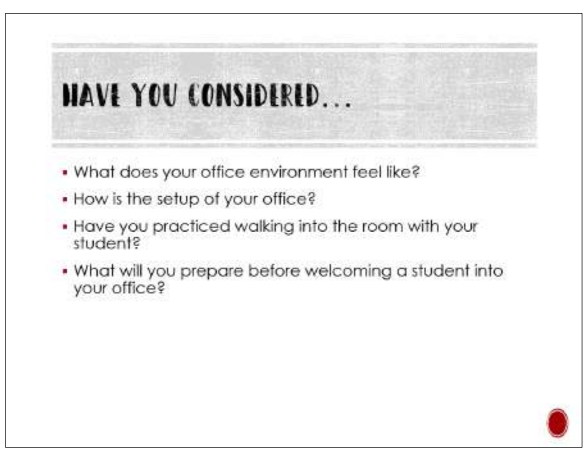


Don't forget about the document, "7 Reasons Students Leave SUU" – this document can be found in your training binder, as well as in the Advising Team Drive, and is a great reminder of some important points to cover with students. If you're not sure what to talk about, this is always a good idea. You may be able to help connect your student with a resource they never even knew existed.

Slide 20

As a final action item, here are a few additional tips for getting off on the right foot with your appointments. Our students have told us how important these factors are, on top of the other things we've discussed!

Slide 21



What does your environment feel like? Have you created a welcoming space, or too clinical of a space?

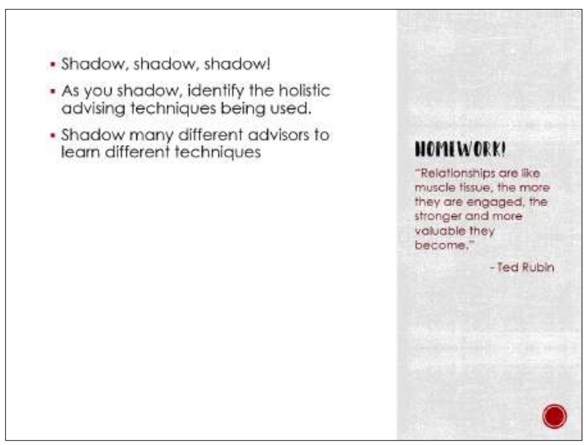
What is the setup of your office like? Have you planned out where you and the student will sit? Do you have enough room for the student to sit comfortably?

Have you practiced how you'll walk into the room with your student?

What will you prepare in your office or on your computer before welcoming a student into your office for their appointment? Make sure to remember body language and body positioning, and that both should be open.

We've covered a ton today – if you're still here, you've done a great job keeping up! Let's take a little quiz to reinforce what we've learned today.

Slide 22



For your homework, please keep shadowing other advisors! If you haven't shadowed much yet, this is the best time to do so; you're learning about the meat of what we do, now get out there and observe it. As you shadow, write down and identify the different holistic advising techniques being used. If you're feeling confident, you can also identify any missed opportunities where an advisor could have built the relationship more. Shadow as many different advisors as you can.

After you have shadowed 10 appointments, answer the essay questions on the next assignment in this module.

Appendix C

Personal Advising and Career Philosophy Participant Packet

Finding Purpose During a Pandemic

Defining Your Personal Advising and Career Philosophy

> “ Even if they do not realize it, every advisor already operates under a personal philosophy of academic advising... Awareness of one’s own [philosophy] enables the advisor to examine and improve their relationships with and the outcomes for students.
> — David Freitag, NACADA (2011)

Your philosophy is NOT:

— a pledge you’re taking to stay an advisor forever

— a description of a “day in the life” (though that can be included as part of your final creation)

— the same as anyone else’s

{ **Philosophy:** a theory or attitude that acts as a guiding principle for your behavior }

→ A theory (your individual ideas and thoughts - what does advising mean to you?)

→ An attitude (your mindset as you approach your career, this position, each student, etc.)

→ Guiding principles (your values - what do you hold dear in your career?) → Your behavior (how you will implement the previous three things - or, how you’ll be able to measure whether or not you’re living up to the philosophy you’ve created for yourself)

Your personal advising and career philosophy is made up of three parts:

1. Where it all began (your “why”)
2. Your end goals (the “what” you value most)
3. The now (“how” you are achieving your end goals and making past you proud)

Part 1 - Where it all began: Your "Why"

NACADA defines advising philosophies in this way:

> "A living document, the statement of personal philosophy serves as a reference to which the advisor can return to draw inspiration and **reconnect with the reasons for entering the field.**"

What were your reasons for choosing this career path?

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Part 2 - Your End Goals: The "What" you value most

Activity/Discussion: Your Retirement Party

In this short clip, FranklinCovey illustrates that sometimes we have to look far into the future to see the impact that we will have on others. But, if we start today, looking ahead to our retirements, we can begin with the end in mind, and focus on what impact we want to make in our careers.

What do you hope your guests will share about you? What impact do you hope to have made on your colleagues, your students, your friends throughout your career?

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Part 3 - The now: how you are achieving your end goals and making "past you" proud

First - Your Personal Do's and Don'ts

1. Mark with a star any prompts that stand out to you as important, based on your own "why" and "what."
2. Narrow down your original starred questions to your top ten (at most) prompts.
3. Jot down a few thoughts about each of your top prompts in the notes space on the opposite page.

Prompts:

- What excites me most about advising?
- How does my role make a difference in the lives of my students and my colleagues?
- What advising approaches do I use (or hope to apply) with students?
- What are my strengths as an advisor?
- What are my challenges as an advisor?
- What do I wish to learn more about in my career?
- When I advise students, I aspire to…
- The thing I value most about working with students is…
- What are some ideas, theories, or methods that have impacted my advising style?
- Three words my students would use to describe me/my advising are…
- Three words my colleagues would use to describe me are...
- What is something I have learned as an advisor?
- What is something I have learned from my students?
- I know I'm making a difference when...
- My greatest career accomplishment is…
- My favorite day as an advisor was…
- What keeps me going in this role?
- I always try to be mindful of…
- What are my most developed advising skills?
- I try to create a welcoming and inclusive environment by…
- How do I handle situations that are personally difficult to me?
- Advising matters because…
- What is the most important part of each advising session to me?
- How would I describe my job to a stranger?
- What would professional development ideally look like for me?
- What are my expectations of myself in this role?
- What are my expectations of my relationship with my students?
- What are my expectations of my relationships with my colleagues?
- What is a career-related goal that I have my eye on?
- An excellent advisor…
- I love my job because...

Part 3 - The now: Continued

Second - Adding Some SUU Spirit

Write down a few of your thoughts surrounding some of the things that make SUU Advising great, namely:

- What does holistic advising mean to you?
- What are your thoughts on student success?
- How do you define meaningful connections?

Part 4 - Putting it all together: Your Homework

1. Read through some of the examples compiled by NACADA, posted in the Team Drive under Advisor Training → Professional Development
2. Decide how you want to organize your personal philosophy. Here are some ideas:
    a. Follow the loose structure of our workshop ("I became an advisor because...I value...I advise by...")
    b. Tell your story, and be inspired by the qualities we discussed today
    c. Mirror the model of one of the NACADA examples
    d. Explain your role, your expectations of others, what they can expect of you, and what you expect of yourself
    e. Describe your goals for the interactions you have with your students, your colleagues, yourself
3. Do it! No - really - do it. Write the thing!

> " An advisor's personal philosophy belongs to him or her alone and can thus take the form and content that best embodies individual preference in prose and priorities for practice. Although the advisor should consider existing guidelines and include essential components, the philosophy mirrors his or her unique view.

Final Thoughts - Why are we doing this?

From NACADA: "A personal philosophy of academic advising gives structure to advising sessions and provides a sense of clarity in day-to-day interaction with students and in long-term career goals. It allows an advisor to incorporate theories of student development into daily work and provides a clear rationale for interactions with students."

"Forget about being impressive and commit to being real. Because being real is impressive!" - Jonathan Harnisch

"You attract the right things when you have a sense of who you are." - Amy Poehler

"Peace of mind always comes with knowing who you truly are, where you currently stand, where you positively need to be, and strongly believing in its possibility." - Edmond Mbiaka

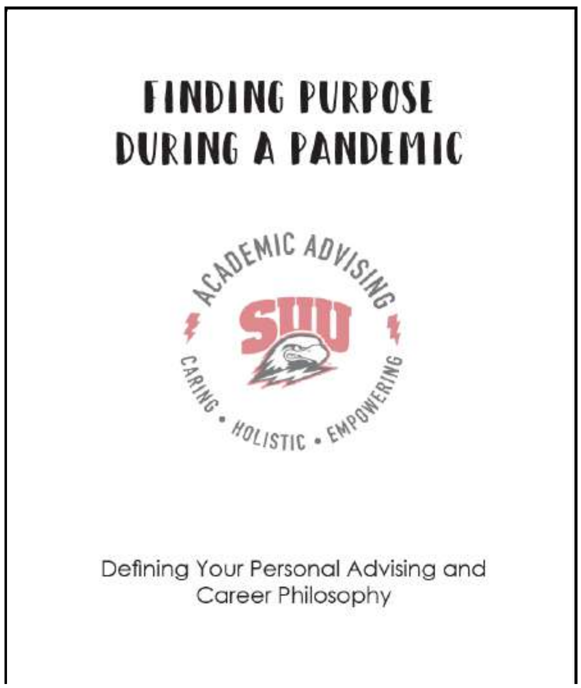
Notes:

Appendix D

Personal Advising and Career Philosophy Trainer Script

Finding purpose during a pandemic

The goals of this training are to help re-center advisors on their purpose, clarify their roles for themselves, and mindfully and intentionally move forward into their advising practice with their purpose and roles defined. Additionally, the training will stimulate the creation of individual advisor philosophies.

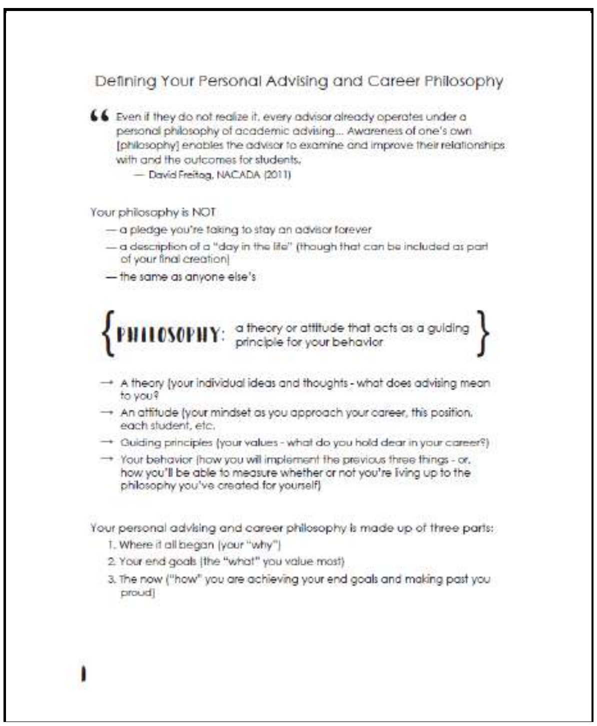


Script

There have been times in the last few months that I've come to my desk in the morning and said to myself, "What's the point? Why am I doing this? Beyond just needing the income, why do I do this job, that some days (e.g., days that I get angry parent emails berating me for things outside of my control) is difficult and draining?" I know maybe not everyone has maybe wondered "what's the point" quite so intensely, but at some time in this job - or any job - you're going to have days where you really have to wonder how you even got into this career in the first place.

These feelings are totally normal - and, related to the recent conversations we've been having within advising, these thoughts are closely related to burnout. So, in working with team leads and doing some of my own research on preventing or treating burnout, I stumbled across some academic articles talking about how feelings of burnout can be treated or even prevented by things like mindfulness, a connection to purpose, and - what I found most interesting - an increase in role clarity. This got me thinking immediately of a session that I attended at UAA in 2019, and inspired me to create this training exercise that I'm excited to introduce to all of you today.

How are we going to bring together mindfulness, purpose, and role clarity today? By defining for ourselves a personal philosophy for our individual advising practices.


Defining Your Personal Advising and Career Philosophy

"Even if they do not realize it, every advisor already operates under a personal philosophy of academic advising... Awareness of one's own [philosophy] enables the advisor to examine and improve their relationships with and the outcomes for students.
— David Freitag, NACADA (2011)

Your philosophy is NOT
— a pledge you're taking to stay an advisor forever
— a description of a "day in the life" (though that can be included as part of your final creation)
— the same as anyone else's

{PHILOSOPHY: a theory or attitude that acts as a guiding principle for your behavior}

→ A theory (your individual ideas and thoughts - what does advising mean to you?
→ An attitude (your mindset as you approach your career, this position, each student, etc.
→ Guiding principles (your values - what do you hold dear in your career?)
→ Your behavior (how you will implement the previous three things - or, how you'll be able to measure whether or not you're living up to the philosophy you've created for yourself)

Your personal advising and career philosophy is made up of three parts:
1. Where it all began (your "why")
2. Your end goals (the "what" you value most)
3. The now ("how" you are achieving your end goals and making past you proud)

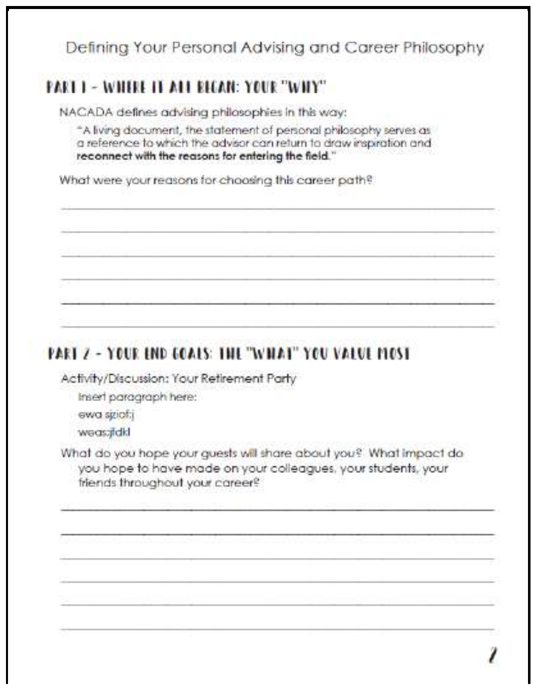
Why is this important? Some of you might be asking that question in your head right now - and I get it. This kind of thing often seems like one of those activities you do that gets thrown in a pile of papers and tossed out with the trash at the end of the semester. But done well, your philosophy can be a living document that you revisit often, that can inspire you with a personal vision of your ideal future, and a nostalgic look to the past when you need a reminder of why you're here in the first place. NACADA states:

> "Even if they do not realize it, every advisor already operates under a personal philosophy of academic advising. Each uses a selected (perhaps initially without intention) approach and method in practice. Awareness of one's own personal philosophy of academic advising enables the advisor to examine and improve their relationships with and the outcomes for students" (Freitag, 2011, paragraph 5).

Now, as a brief introduction, I want to talk about what your philosophy is NOT, before we jump into what it should be. First, your personal philosophy is NOT a pledge you're taking to stay an advisor forever. It is also NOT just a description of a "day in the life," though that can be part of your final creation. Your philosophy is also NOT going to be the same as anyone else's on our team. Especially because, while part of our personal philosophy will focus on your current role in advising, my goal for this project is that it can be more personal for you than that, and be a guide to other aspects of your life as well.

Let's start by defining philosophy. I found a great article that broke down philosophy like this. Your philosophy is a theory or attitude that acts as a guiding principle for your behavior. So - a theory (your individual ideas and thoughts - what does advising mean to you?), an attitude (your mindset as you approach each student), guiding principles (your values - what do you hold dear?), and your behavior (how you will implement the previous three things - or, how you'll be able to measure whether or not you're living up to the philosophy you've created for yourself).

The rest of our workshop today is going to help you prepare to write your own personal advising philosophy. We'll incorporate three important pieces today - your original "why", your end goals (the "what"), and the "how" to inspire yourself every day to get where you want to be.



Defining Your Personal Advising and Career Philosophy

PART 1 - WHERE IT ALL BEGAN: YOUR "WHY"

NACADA defines advising philosophies in this way:

"A living document, the statement of personal philosophy serves as a reference to which the advisor can return to draw inspiration and **reconnect with the reasons for entering the field.**"

What were your reasons for choosing this career path?

PART 2 - YOUR END GOALS: THE "WHAT" YOU VALUE MOST

Activity/Discussion: Your Retirement Party

Insert paragraph here:

ewa sjziof;j

weas;jfdkl

What do you hope your guests will share about you? What impact do you hope to have made on your colleagues, your students, your friends throughout your career?

2

So, where do we start? Let's start at the very beginning, it's a very good place to start (think Sound of Music). NACADA defines advising philosophies in this way: "A living document, the statement of personal philosophy serves as a reference to which the advisor can return to draw inspiration and **reconnect with the reasons for entering the field**" (Freitag, 2011, paragraph 2).

Please take a few minutes now to think back and reflect on the reasons you decided on this career path. For some of you, that means specifically, why did you want to become an advisor? For others, this could be a little bit more broad - why did you choose to enter higher education? In any case, think back on your life and on the process that led you here. Why are you here? What is your purpose - the purpose being one of the pieces we want to connect to as we learn to prevent burnout?

These hard questions are going to be worth it in the end, I promise! Would anyone feel comfortable sharing? I know we all have very unique stories and reasons for being here.

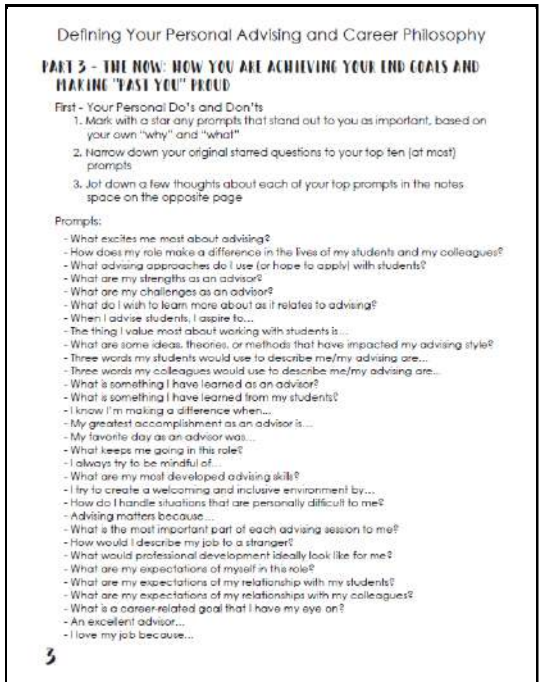
Next, we move quite literally from the beginning to the end. I'm going to show you a clip of this video by FranklinCovey - titled Your 80th birthday. While we watch this clip, I want you to personalize it to your career - instead of your 80th birthday, this is your retirement party! As you watch, write down some things that you would want to hear at your retirement party, from all of the people you impacted during your career.

Play: https://www.youtube.com/watch?v=txa-LRpMgss Start to 2:34

Does anyone feel comfortable sharing the things you most hope your guests will share about you at your retirement party?

Great, thank you, everyone! Each of these things are an indicator of some of the values in your career that you hold most dear. For example, one of the things that I wrote down was the statement, "I was the ear that let them be heard." For me, that statement shows me that I value compassion. I also wrote down the statement, "I gave all I could," which shows me that I value hard work, or making a valuable contribution. You likely already know what you value in life, but identifying and defining the values you hold most dear in your career will benefit you greatly as you refer back to your advising philosophy in hard times.

The beginning and the end are important as we consider purpose and create role clarity. Knowing why you wanted to be here to begin with can give you guidance to what this role is for you, and how you'll be able to find a sense of purpose during the hard times. And, beginning with the end in mind, you can further personalize this role for yourself by learning to focus on what will bring you to your own desired end.



Defining Your Personal Advising and Career Philosophy

PART 3 - THE NOW: HOW YOU ARE ACHIEVING YOUR END GOALS AND MAKING "PAST YOU" PROUD

First - Your Personal Do's and Don'ts

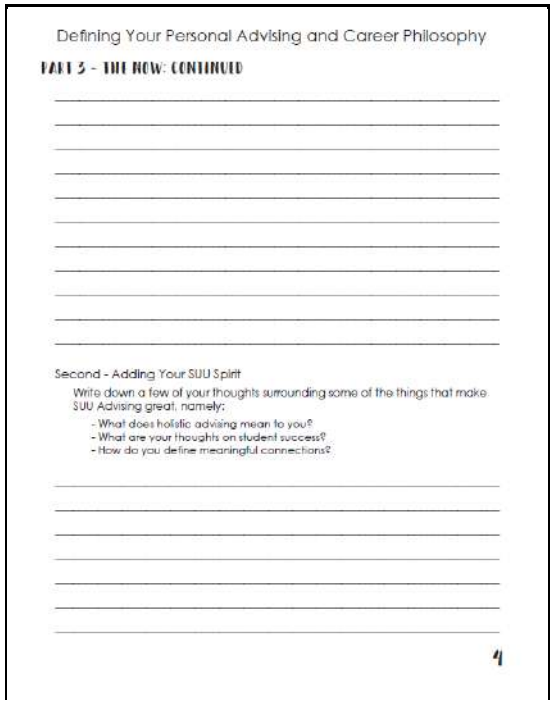
1. Mark with a star any prompts that stand out to you as important, based on your own "why" and "what"
2. Narrow down your original starred questions to your top ten (at most) prompts
3. Jot down a few thoughts about each of your top prompts in the notes space on the opposite page

Prompts:

- What excites me most about advising?
- How does my role make a difference in the lives of my students and my colleagues?
- What advising approaches do I use (or hope to apply) with students?
- What are my strengths as an advisor?
- What are my challenges as an advisor?
- What do I wish to learn more about as it relates to advising?
- When I advise students, I aspire to...
- The thing I value most about working with students is...
- What are some ideas, theories, or methods that have impacted my advising style?
- Three words my students would use to describe me/my advising are...
- Three words my colleagues would use to describe me/my advising are...
- What is something I have learned as an advisor?
- What is something I have learned from my students?
- I know I'm making a difference when...
- My greatest accomplishment as an advisor is...
- My favorite day as an advisor was...
- What keeps me going in this role?
- I always try to be mindful of...
- What are my most developed advising skills?
- I try to create a welcoming and inclusive environment by...
- How do I handle situations that are personally difficult to me?
- Advising matters because...
- What is the most important part of each advising session to me?
- How would I describe my job to a stranger?
- What would professional development ideally look like for me?
- What are my expectations of myself in this role?
- What are my expectations of my relationship with my students?
- What are my expectations of my relationships with my colleagues?
- What is a career-related goal that I have my eye on?
- An excellent advisor...
- I love my job because...

3

Now, the "how." The last remaining piece we need to be able to puzzle together our personal philosophies is how we're going to reach our desired end. This section is going to help us with the "role clarity" piece, because a huge part of having an effective advisor philosophy is defining where we are now. From NACADA publications, I've pulled together a number of prompts that can give us some of the bulk of the rest of the content we need to pull your personal advising philosophy together. I'd encourage you on the next page to read through some of the questions and mark with a star any and all that stand out to you as important, based on what advising is for you. Great! Now, go back through your starred questions and if you picked more than ten, narrow it down to at most ten.


Defining Your Personal Advising and Career Philosophy

PART 3 - THE NOW: CONTINUED

Second - Adding Your SUU Spirit

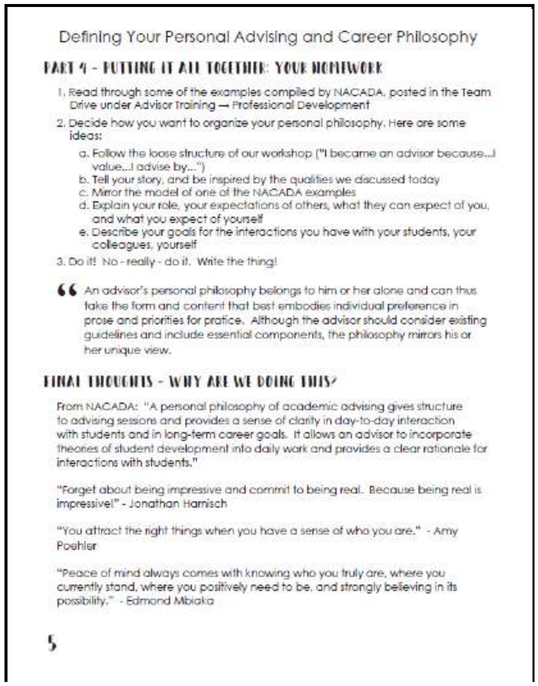
Write down a few of your thoughts surrounding some of the things that make SUU Advising great, namely:

- What does holistic advising mean to you?
- What are your thoughts on student success?
- How do you define meaningful connections?

4

Next, go ahead and jot down a few thoughts about each of those in the notes space provided on the following page.

Finally, while I did mention that this is individual and unique to each of us, while we are creating our philosophies as SUU advisors, be sure that you've touched on the points listed that are relevant to SUU Advising as a whole.



Defining Your Personal Advising and Career Philosophy

PART 4 - PUTTING IT ALL TOGETHER: YOUR HOMEWORK

1. Read through some of the examples compiled by NACADA, posted in the Team Drive under Advisor Training → Professional Development
2. Decide how you want to organize your personal philosophy. Here are some ideas:
   a. Follow the loose structure of our workshop ("I became an advisor because...I value...I advise by...")
   b. Tell your story, and be inspired by the qualities we discussed today
   c. Mirror the model of one of the NACADA examples
   d. Explain your role, your expectations of others, what they can expect of you, and what you expect of yourself
   e. Describe your goals for the interactions you have with your students, your colleagues, yourself
3. Do it! No - really - do it. Write the thing!

> “ An advisor's personal philosophy belongs to him or her alone and can thus take the form and content that best embodies individual preference in prose and priorities for pratice. Although the advisor should consider existing guidelines and include essential components, the philosophy mirrors his or her unique view.

FINAL THOUGHTS - WHY ARE WE DOING THIS?

From NACADA: "A personal philosophy of academic advising gives structure to advising sessions and provides a sense of clarity in day-to-day interaction with students and in long-term career goals. It allows an advisor to incorporate theories of student development into daily work and provides a clear rationale for interactions with students."

"Forget about being impressive and commit to being real. Because being real is impressive!" - Jonathan Harnisch

"You attract the right things when you have a sense of who you are." - Amy Poehler

"Peace of mind always comes with knowing who you truly are, where you currently stand, where you positively need to be, and strongly believing in its possibility." - Edmond Mbiaka

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All right. You've made excellent progress today. You've thought about your career end goals (even if somewhat amorphously!), you've reminded yourself of where you started, and you've defined what this point in your career really means to you. How do we put it all together? This part is up to you.

In the Team Drive, you'll find some examples of advising philosophies that were curated by NACADA. While I would encourage you to read through them, as well as the suggestions provided in your training packet, this is the part where it really gets personal. You have to put this together in a way that makes the most sense to you! According to NACADA, "An advisor's personal philosophy belongs to him or her alone and can thus take the form and content that best embodies individual preferences in prose and priorities for practice. Although the advisor should consider existing guidelines and include essential components, the philosophy mirrors her or his unique view" (Freitag, 2011, paragraph 2).

Now, it's not going to happen here and now, but your homework over the next few weeks is, don't let this project die. Don't let this be another workshop that goes on the PD stack on your desk and gets thrown in the trash later. Block out some time to really delve into yourself and create a document that can inspire you on the days that get hard.

As one last note, I want to talk about why. Why are we doing this? How is it going to help? First, having a personal philosophy is a tool to create greater career development in the future for each of you. Having a statement ready that shows your goals, your values, where you're coming from can make it easier to put together any application. And, it can help you know what you want to focus on while in this position to help you meet the end goals you've identified. Your advising philosophy is also a required document to apply for advising awards on the state, regional, and national levels.

From NACADA, "A personal philosophy of academic advising gives structure to advising sessions and provides a sense of clarity in day-to-day interaction with students and in long-term career goals. It allows an advisor to incorporate theories of student development into daily work and provides a clear rationale for interactions with students" (Freitag, 2011, paragraph 4).

All of these things are excellent. But here's my favorite reason for putting your advising philosophy to good use. In the world today, we're so overstimulated. People talk and it's just so much noise. What makes people listen is authenticity. People - students, supervisors, President Wyatt - listen when you can get REAL with them. But it's hard to get real with someone when you're on the edge of burnout so intense that you feel like you might not make it to tomorrow. Things like this advising philosophy are what can help you reconnect with your purpose, provide you with deeply needed role clarity, and remind you to be intentionally and mindfully YOU. Because YOU are what your students - and all of us - need. Would anyone like to share some final thoughts today on anything we've touched on in this workshop?