

# **Academic Advising Review Report**

**California State University  
Bakersfield**

**Bakersfield, CA  
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**PREPARED BY NACADA CONSULTANTS**

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Thank you to the administrators, staff, faculty, and students who participated in this program review. NACADA: The Global Community for Academic Advising is honored to have facilitated this review, which is grounded in the Conditions of Excellence in Academic Advising (EAA). This report has identified the strengths, challenges, and recommendations for improvement at your institution. As you begin implementing the recommendations, [NACADA Consulting](#) is available to support you through the process with an array of world-class services. Below is a brief description of each of those services:

- The EAA Self-Study process engages institutions in a yearlong, holistic, and systemic review of academic advising from a teaching and learning perspective with support and guidance from experts in academic advising as well as experts in educational and organizational change.
- NACADA Consulting offers institutions two comprehensive assessments—a Student Survey and a Faculty/Staff Survey—that are directly related to the intended outcomes of academic advising.
- Our Speakers are recognized nationally and globally as advising’s top scholar-practitioners and provide both virtual and on-site keynote addresses and motivational speeches at institutional conferences, professional meetings, and other special events.
- NACADA Consulting secures Speakers and Consultants who facilitate professional development workshops for a variety of populations on an array of topics based on institution-specific needs. These workshops are typically scheduled for a full or half day.
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- Access to our engaging and active network of 14,000 members;
- Access to competitive awards that recognize excellence; and
- Access to scholarships so members can engage in events that best support their goals.

We applaud your efforts to elevate academic advising at your institution as it is critical to student success. Please contact [NACADA Consulting](#) for follow-up conversations or to discuss how our services can help you meet your goals.

Sincerely,



Kyle Ross, EdD  
Executive Director  
NACADA: The Global Community for Academic Advising

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## EXECUTIVE SUMMARY

California State University-Bakersfield (CSUB) is a moderately sized university that, by higher education standards, is relatively new at 50 years old. At present, CSUB, as with the other universities in the CSU System, is facing enrollment concerns and financial constraints. Academic advising has not been immune to these institutional concerns, nor are the concerns and issues about academic advising new. In fact, the concerns and issues expressed about advising in documents and reports by reaffirmation teams, external consultants, internal workgroups, and students regarding academic advising continue to point to the need to:

- improve access to advising for all students,
- address inconsistencies in the student advising experience across the university,
- clarify the roles and responsibilities of those who advise, i.e., faculty advisors and professional advisors,
- provide timely and role appropriate onboarding and professional development for faculty and professional advisors,
- improve the accuracy and reliability of technology tools that support advising at CSUB,
- address policy and procedural inconsistencies in areas that directly affect students, and
- establish and sustain a culture of communication, collaboration, and respect among faculty, staff, and students.

The need for improvement was echoed by students, faculty, professional staff, and administrators during the review visit. In particular, students expressed an interest in improved access to advising and advisors as well as advising conversations that extend beyond course selection, in particular conversations about career exploration and opportunities were noted.

The implementation of the decision to situate the coordination of academic advising within Strategic Enrollment Management and Student Support has begun. This action appears to be designed to move the university beyond discussion and toward action, particularly given recommendations emanating from the regional accrediting body, WSCUS/WASC. There are strong emotions around how this decision was made without consultation with the faculty or advisors and has raised concerns about what this means for advising operations within Colleges and the role of the faculty in a shared governance environment. That said, having discussions regarding what coordination means and how it is best accomplished within the new reporting and supervisory relationships are critical to its success. In the end, given the extent to which previous discussions about academic advising have led to few changes, transparency is key.

Transparency begins with collectively and collaboratively defining academic advising along with its purpose for CSUB students. The creation of a vision, mission, and set of outcomes (for students and those who advise and mentor) is essential for the development of a cohesive and coordinated academic advising program; without these elements what exists is not a program, but rather an unconnected set of activities that may or may not achieve institutional goals for students.

A key paragraph in the *Framework for the Consultants' Visit*, included in this document, captures the contributions that quality and purposeful academic advising makes to the student learning experience.

Academic advising is best viewed as a form of teaching and is integral to the success of the teaching and learning mission of higher education institutions. As Marc Lowenstein (2005) observes, “an excellent advisor does the same thing for the student’s entire curriculum that the excellent teacher does for one course.” Advisors teach students to value the learning process, to apply decision-making strategies, to put the college experience into perspective, to set priorities and evaluate events, to develop thinking and learning skills, and to make informed choices.

Academic advising is integral to the teaching and learning mission of the institution and directly related to the curriculum. As *NACADA: The Global Community for Academic Advising* offers in its *Concept of Advising Statement*, advising must have *a curriculum, a pedagogy, and a set of learning outcomes (for students and advisors)*. In this regard, a mission statement for academic advising must be developed and, along with this mission, a set of learning outcomes that can be used within individual academic units to guide the development of more college and/or departmentally specific outcomes directly related to the program or major.

In the consultant team’s view, the recent reorganization decision, while not made in the most collaborative way, does provide CSUB a rare and important opportunity to rethink what academic advising is at CSUB and move it beyond course selection, scheduling, and registration. The opportunity exists to craft a mission and set of outcomes that can serve as guides for all and also be tailored to the specific needs of college and departmental curricula and requirements. The mission should reflect and reinforce the partnership between advisors and faculty members as well as strengthen the connections among colleges and departments. Academic advising should intentionally connect the impressive array of high impact practices at CSUB to the conversations students have with advisors, faculty, and mentors about their career and future educational plans, making the experience in and outside the classroom more relevant to student interests and goals as they enter, move through, and exit the university.

### **Overall Strengths**

- CSUB faculty, staff, and students recognize that academic advising is important to student success. Ultimately, although there are differences among constituents regarding the approach to change, everyone at CSUB supports the goal of improving academic advising. This goal is shared by professional advisors, faculty, administrators, and students. When juxtaposed as an opportunity rather than a threat to autonomy, the potential exists to transform academic advising from a transactional process equated with scheduling to a relational model that is student-learning centered.
- Professional advisors are absolutely passionate about their students, committed to the work, and loyal to the institution. Many of the professional advisors are alums and many have “grown up” with CSUB. CSUB is viewed fondly in their own development and growth and, as alums, they want to ‘give back.’
- CSUB students are incredible and amazingly resilient; many expressed that they figured out their own paths forward and that they generally had no conversations with anyone regarding career direction.
- There are many individual student-centered success initiatives within colleges and departments that need to be shared with others and celebrated.

### Overall Challenges

- Overall, academic advising is highly decentralized by college and there is no coordination between colleges and, perhaps, departments.
- Coordination of advising within colleges is spotty and inconsistent.
- Review fatigue has set in which has affected faculty and staff morale---the expectation is that nothing may come of this review and folks are girding themselves for that eventuality.
- There is an absence of a clear onboarding process and a lack of professional development for professional advisors. This contributes to feelings of being marginalized and not respected as colleagues with expertise, although many hold master's degrees and teach as adjuncts at CSUB.
- There is no shared understanding of what academic advising is at CSUB and thus, there is not a cohesive academic advising program.
- There is a level of anxiety among faculty members and professional advisors in the absence of clarity about what the current changes mean for their work, college/department support, and, particularly for faculty members, academic oversight of academic advising. This is made even more important given the financial issues facing CSUB and the CSU System as a whole.

### Highest Priority Recommendations

- **Establish an Advising Council with Institution-Wide Representation the Includes Individuals from the Colleges, Faculty Governance, Professional Advisors, Strategic Enrollment Management and Student Support, and Student Affairs.**
  - *Consider having Co-Chairs from the Academic Senate and Strategic Enrollment Management and Student Support*
  - *Charge Council with guiding the transition plan*
    - Establish workgroups to address priority areas:
      - Vision, Mission, and Outcomes for Academic Advising.
        - Determine the intended outcomes for Advising and Mentoring Students
        - Clarify the roles and responsibilities of those who advise, i.e., faculty advisors and professional advisors,
      - Advising Curriculum Development. Start with advising first-year students and then build for each advising year
      - Access to Advising. Review and make recommendations to improve access to advising for *all* students,
      - Onboarding and Professional Development. Provide timely and role appropriate onboarding and professional development for faculty and professional advisors,
      - Accuracy and Reliability of Technology Tools. Improve the accuracy and reliability of technology tools that support advising at CSUB,
      - Academic Policies and Procedures. Address policy and procedural inconsistencies in areas that directly affect students,

- Communication Plan Development,
  - Monitor Implementation of Proactive Caseload Management Advising Program (PCMAP) Model.
- **Create the Proactive Caseload Management Advising Program (PCMAP)** (see *Organization Condition, Figure 1, and Appendix F*).
- **Develop a Plan for a Phased Implementation of the Proactive Caseload Management Advising Program (PCMAP).**
  - Two Models to Consider (see *Organization Condition*):
    - **Option A:** All-College Implementation
    - **Option B:** College-by-College Implementation



## FRAMEWORK FOR CONSULTANTS' VISIT

It is important to clarify the consultants' perspective on academic advising as a preface to our observations and recommendations. NACADA has endorsed several pillars that address the philosophy and practice of academic advising: NACADA Concept of Academic Advising, NACADA Statement of Core Values, the NACADA Academic Advising Core Competencies, and the Nine Conditions of Excellence in Academic Advising (EAA). Links to each of these documents may be found on [NACADA's website](#).

Advising programs that employ promising practices will reflect the theoretical foundations of advising contained in these documents. For the purpose of framing the context of this academic advising program review, the following points address major assumptions about successful academic advising:

Academic advising is best viewed as a form of teaching and is integral to the success of the teaching and learning mission of higher education institutions. As Marc Lowenstein (2005) observes, "an excellent advisor does the same thing for the student's entire curriculum that the excellent teacher does for one course." Advisors teach students to value the learning process, to apply decision-making strategies, to put the college experience into perspective, to set priorities and evaluate events, to develop thinking and learning skills, and to make informed choices.

The *NACADA Concept of Academic Advising* identifies three essential components of advising: curriculum (what advising deals with), pedagogy (how advising delivers the curriculum), and student learning outcomes (the result of academic advising). These student learning outcomes are based upon what we want students to know, to do, and to value and appreciate as a result of the academic advising process.

The [Conditions of Excellence in Academic Advising](#)\* framework was created through a partnership with the John N. Gardner Institute for Excellence in Undergraduate Education and NACADA. These conditions acknowledge the role of academic advising in promoting student learning, success, and completion as well as the complexity of higher education and organizational change. They are specifically designed to serve as measures for improving practices, processes, and institutional culture surrounding academic advising in an evidence-based manner that supports broad campus change.

The consultants have chosen to situate the findings and recommendations of this report within the framework of the Conditions of Excellence for Academic Advising, including strengths, areas for improvement, and recommendations to consider in an effort to enhance academic advising in the College of Education at California State University-Bakersfield.

*\*The Conditions of Excellence in Academic Advising are aspirational standards to guide evidence-based improvement of academic advising. The Conditions were jointly created by NACADA: The Global Community for Academic Advising and the John N. Gardner Institute for Excellence in Undergraduate Education and may be used in non-commercial ways by third parties under a Creative Commons Attribution and No Derivatives license.*

## INTRODUCTION

On March 10-12, 2025, a consulting team from *NACADA: The Global Community for Academic Advising* visited California State University-Bakersfield (CSUB) to conduct a program review for the purpose of making recommendations that would contribute to the improvement of academic advising (see Appendix A). The team consisted of Dr. Joanne Damminger, Adjunct Program Coordinator in the College of Education and Liberal Arts and Adjunct Associate Professor in the Ed.D. in Higher Education Leadership Program at Wilmington University in Delaware, and Dr. Susan M. Campbell, Chief Student Affairs Officer, Emerita at the University of Southern Maine. Drs. Damminger and Campbell have extensive experience in higher education and, specifically in academic advising, as practitioners, administrators, and scholars. Each served as president of *NACADA: The Global Community for Academic Advising* and have been intimately involved in the work of NACADA's Excellence in Academic Advising initiative.

Prior to the visit, the team met virtually with Dr. Jennifer Mabry, Associate Dean and Dr. Dwayne Cantrell, Vice-President for Strategic Enrollment Management and Student Support, to learn more about the status of academic advising at CSUB and, in particular, to understand the breadth and depth of past and current improvement efforts. CSUB had recently altered the reporting structure for academic advisors from College-based to a centralized reporting through Strategic Enrollment Management and Student Support. This new reporting structure was not intended to change the decentralized model of advising in place but rather to better coordinate academic advising across the institution and to develop a consistent and cohesive academic advising program for all students. Three questions guided the consultants' visit:

- What is working well in academic advising at CSUB?
- In what ways could academic advising be improved at CSUB, i.e., what is not working as well as it could?
- How, what, and by when might a transition to a centralized coordinated structure be accomplished?

Onsite, these questions were primarily explored through conversations with various constituents (faculty, staff, students, administrators). In addition, the team reviewed several artifacts that documented previous efforts to move CSUB toward academic advising improvements, including reaffirmation reports by WSCUS/WASC, a consultant report by Inside Track, initial efforts to engage CSUB in an academic advising self-study process, and myriad surveys conducted as part of a process (e.g., Outcomes Surveys associated with the EAA Self-Study process) or by other campus groups, i.e., students. During the visit, the consultants also conducted a few informal data-gathering activities geared toward positioning academic advising within the teaching and learning fabric of CSUB; these data served to affirm information gleaned during the interview conversations and in the provided reports.

**About CSUB.** California State University-Bakersfield (CSUB) is a moderately sized university that, by higher education standards, is relatively new at 50 years old. Recently classified as one of 12 California State Universities as a "Research College and University" by the Carnegie Foundation for the Advancement of Teaching, CSUB serves undergraduate, post-baccalaureate students, graduate students, and the community through the many baccalaureate, masters, doctoral, and certificate programs and courses that are available. There are four Colleges within CSUB: Arts & Humanities (AH), Social Sciences and Education (SSE), Natural Sciences,

Mathematics, and Engineering (NSME), and Business and Public Administration (BPA). CSUB also has expanded its offerings through the Antelope Valley campus. Antelope Valley's degree programs and courses are extensions of programs and courses offered by the four Colleges within CSUB. The Antelope Valley campus has a Dean who is part of the Provost's Council and who works collaboratively with the other academic units of CSUB.

**CSUB Students.** Over 60 percent of CSUB's enrollment is Hispanic/Latinx (68%); this holds true at both the undergraduate and graduate levels. The second largest student population is self-classified as White at 13%, with Asian Americans at third at 6%, and Blacks/African Americans fourth at 4%. (Source: 2024 CSUB Data Dashboards). CSUB is designated as a Hispanic-Serving Institution; overall over 70% of CSUB's enrollment is comprised of URM (under-represented minority) students. Further, 42% of CSUB's undergraduate enrollment is first-generation and CSUB also has a significant incoming student enrollment of transfer students, the latter mostly from local or regional community colleges. The following snapshot offers a quick profile of CSUB's Fall 2024 undergraduate enrollment of 8792 students (excluding post-baccalaureate students).

**Fall 2024** (*Data Source: CSUB Student Data Dashboards*). Of the 8792 undergraduate degree-seeking students enrolled in Fall 2024:

- 77% were less than or equal to 24 years of age
- 69% were self-identified as Hispanic/Latinx
- 29% were Newly Admitted Students while 68% were Continuing or Returning Students
- 42% were First Generation (students whose parents had no post-secondary experience)
- 65% were First Generation (if students first in their families to pursue a baccalaureate degree are included)
- 65% Female

In addition, a quick review of Fall 2023 data reveals that almost 39% of CSUB undergraduate students fall into three (3) 'at risk' populations: *First Generation, Underrepresented Minority, and Pell Grant recipients*. Even while the number of students enrolled has fluctuated—particularly during the COVID years—this profile has remained fairly stable over time. This includes the high percentage of students who are represented in the three 'at risk' populations.

In Appendix B, we provide additional details about CSUB's undergraduate enrollment, retention, and graduation rates. Those additional details reveal areas of opportunity for CSUB in its improvement efforts.

**Academic Advising at CSUB.** Academic advising at CSUB follows a decentralized model where Colleges have, in varying forms, professional academic advisors who work with students within particular majors. Faculty members also serve as advisors and have authority over the curriculum and articulation/substitution decisions. Different Colleges/Departments utilize professional and faculty advisors in different ways. In some instances, professional advisors work with students during the first two years and then transition them to work with faculty advisors. Others have professional advisors working with students during their entire experience at CSUB. Colleges/Departments operate autonomously from other Colleges/Departments.

While there exists evidence of some collaboration among Colleges/Departments, this does not appear to be the norm. The exception to this siloed structure is the Antelope Valley Campus; this is because the programs at Antelope Valley are brokered from the other Colleges/Departments at CSUB. In this regard, the Dean of the Antelope Valley works collaboratively with other academic units as well as with units that provide support services for students. The Antelope Valley Campus has a professional advisor who works with students and connects with main campus programs.

CSUB's interest in developing an effective academic advising delivery structure that utilizes both professional and faculty advisors is not new and has its roots in the campus conversion from quarters to semesters in 2017. At that time, CSUB had hired professional advisors to provide additional support. After the conversion, the decision was made to continue to utilize professional advisors to support advising. An internal CSUB task force was charged with developing an advising model to include professional and faculty advisors. We are unclear regarding the specifics of that report or about actions taken in response to it (Advising and Faculty Mentoring Model).

In February 2020, CSUB received reaffirmation of accreditation for 8 years, with a Special Visit Review to be scheduled in 2023 and an Interim Report due in March 2025. The reaffirmation team's recommendations regarding academic advising and other academic support services included:

Visiting Team Report (2019)

...ensure consistency, effectiveness, and quality of academic support services, including advising, tutoring, supplemental instruction, and course scheduling, to enhance student success for all students. (CFRs 2.12, 2.13) (p. 15)

Special Visit Review (2023)

...clarify roles and strengthen the working relationships of faculty advisors and professional advising staff by implementing collaborative training, standardization of terminology, practices and policies across all schools and departments, while also allowing for some level of flexibility among disciplines, and by developing and using clear success metrics to assess the effectiveness of advising. (CFR 2.12) (p.11)

The Special Visit Review report acknowledged the significant work accomplished in support areas such as tutoring and supplemental instruction and noted that additional efforts needed to be pursued related to academic advising. In both reports, CSUB was commended on its work in several areas, including high impact practices.

There have been several internal and external reports about the state of academic advising at CSUB that include recommendations for improvement. The more recent recommendations from WSCUS/WASC, while apparently having led to discussions, participation in a NACADA Summer Institute, as well as external consultations, did not appear to result in changes to address the WSCUS/WASC concerns.

It is within this broader context that the NACADA Consulting Team conducted interviews, examined data, and reviewed previously written documents and reports.

As advising practitioners, we believe that academic advising, in its best form, is built on the development of a relationship between the student and advisor. The conversations between students and advisors should result in supportive and trusting relationships that lead to students' exploration of educational, career, and personal goals. In a decentralized delivery system which, as we understand it, will continue to be the case at CSUB, coordination and partnership development is essential to building a cohesive academic advising program that addresses the interests and motivations of all students. In our view, effective coordination, collaboration, and advisor-faculty partnerships cannot be developed without a shared understanding of:

- the mission and outcomes for academic advising,
- advising's relationship to the curriculum and career interests of students,
- the roles and responsibilities of those who advise,
- the professional development required for all advisors, and
- an assessment plan.

In our view, the transition to a coordinated structure for academic advising presents a unique opportunity for this community to reimagine academic advising at CSUB and structure a cohesive program that is responsive and relevant to student needs *and* respects academic autonomy through collaboration and support.

The consultants have used the framework of the *Conditions of Excellence for Academic Advising* to guide this review. The *Conditions of Excellence* framework examines academic advising from a systems perspective. While each Condition has a specific definition and lens, in fact, they are all interrelated. Thus, comments in strengths, challenges, and recommendations, while situated under the Condition we thought most relevant to the item, may have points of overlap.

Our findings regarding strengths and challenges are situated under the particular Condition we thought most relevant to the items. We included individual recommendations for CSUB to consider. Our Conclusion summarizes our work; thanks all CSUB faculty, staff, and administrators for their hospitality; and offers NACADA's assistance to support this important effort.

## STRENGTHS, CHALLENGES, AND RECOMMENDATIONS ORGANIZED BY CONDITIONS OF EXCELLENCE

The findings of this review are organized into strengths, challenges, and recommendations integrated within the *Nine Conditions of Excellence in Academic Advising*. While the Conditions are framed within an institutional context, they are, in fact, intended to be applied to multiple levels within an institution, i.e., school/college/division/department, etc.

### Commitment

#### *Explanation of Condition*

Institutions recognize that academic advising is integral to the students' educational experience and the institution's teaching and learning mission. This commitment begins with an institutional academic advising mission statement that is informed by the values and beliefs of the institution and dedicated to an inclusive and equitable student learning centered approach. Both widely understood and articulated in institutional documents, this statement informs practice as well as the administration, organization, delivery, and assessment of academic advising.

#### *Strengths*

There is a strong commitment on the part of the institution to make improvements in academic advising.

There exists a broad understanding of what comprises academic advising.

Some strong partnerships exist between advisors and faculty members. These should be better understood and shared in relationship to the pending coordinating transition to Strategic Enrollment Management and Student Support.

#### *Challenges*

There is no shared understanding of what academic advising is at CSUB. Mission statements about academic advising that the consultants could find on the website and other documents equate academic advising with scheduling. This is true for both faculty and professional advisors. That said, discussions with professional advisors, faculty, and students revealed a much broader understanding of academic advising; an understanding that doesn't appear to be translated into practice in all academic units.

In our view, not having a shared understanding of academic advising contributes to the wide variance in the content and delivery of academic advising at CSUB. The development of a university-wide mission statement and set of student learning outcomes will help CSUB in developing clarity around the roles and responsibilities of both professional advisors and faculty and bring consistency to the student advising experience.

Equating academic advising only with scheduling reduces this educational process to a transaction rather than a relationship. Operationally this perspective separates the advising function from the teaching and learning mission of CSUB. Effective academic advising is an integral part of student learning success. This means that academic advising must be seen as inextricably intertwined with the curriculum. As such, the

partnership between professional advisors and faculty members is essential to assisting students in developing an educational and career plan.

### *Recommendations*

***Collaboratively Develop a Shared Understanding of the Purpose of Academic Advising at CSUB that Includes Vision and Mission Statements, and a Set of Student Learning Outcomes that Align with CSUB's Teaching and Learning Mission.*** While implemented differently among advising units, these elements should be used to inform and guide practice across all colleges. This process should also include the development of a curriculum map and a strategy for assessment. The curriculum maps should account for student transitions, particularly between Colleges. Additional information about assessment is included under the "Learning" condition.

## **Learning**

### *Explanation of Condition*

Excellent advising programs have curricula, pedagogies, and student learning outcomes for academic advising explicitly articulated throughout a student's educational experience. These outcomes are aligned with the institution's academic mission, and goals and are systematically assessed and refined based upon documented assessment results. Institutions ensure that academic advisors are knowledgeable about the institution's expected learning outcomes, curriculum, pedagogy, and the student learning process. This commitment to learning is widely understood and articulated in institutional documents, informs practice as well as the administration, organization, delivery, and assessment of academic advising. Most importantly, institutions ensure equity in the academic advising experience for all students.

### *Strengths*

Our conversations with professional advisors and faculty members revealed a rich understanding and agreement about what academic advising could and should be at CSUB. This was particularly important to hear given the student profile of CSUB students.

### *Challenges*

The outcomes for advising for students and advisors need to be made explicit and there should be agreement about general outcomes that serve as guidance for all academic advising in all colleges and units. That said, how outcomes are achieved within units may be different and units may have outcomes that are more discipline, profession, or field specific. For example, while inherently academic advising is a developmental process, there exist a variety of different approaches that reflect particular philosophies or theoretical frameworks. Examples that come to mind include Developmental Advising, Appreciative Advising, and Coaching to name a few. CSUB does not have to adopt a particular approach to advising, but it does need to adopt a set of broad outcomes that each academic unit can use to guide the work, adapting practice and activities as appropriate.

A challenge that was seemingly universal for advisors was that time limitations and number of students needing advising limited their ability to have deep conversations

beyond those related to course scheduling and registration. Access to academic advising beyond the specified advising or enrollment periods that are unique to each college is critical for all students and should not be delimited by the availability of the schedule. The challenge for CSUB is to de-tether advising from course registration. While advising materials indicate that students should connect with their advisors, in reality, the ability to schedule an appointment or walk-in is limited. Several students expressed a desire to meet with an advisor but found it difficult to do so outside of the advising or enrollment periods; others experienced recurring cancellations of appointments (particularly virtual appointments). Further, with few exceptions, students indicated they “simply gave up” trying to meet with an advisor and either self-advised or relied on family and friends for assistance.

### *Recommendations*

***Develop and Publish Student Learning Outcomes and Operational Outcomes.*** In conjunction with the development of mission and vision statements, a set of student learning outcomes should be developed for undergraduate advising. In addition, a set of outcomes that reveal the expectations for the work, i.e., operational outcomes, is also needed. A great resource for the development of student learning outcomes is Suskie’s *Assessing Student Learning: A Common Sense Guide* (2018). Suskie distinguishes a learning goal from a learning outcome; the former referring to an intended outcome and the latter as the result. She categorizes learning goals into broad categories: Knowledge and Understanding; Thinking Skills; Performance Skills, Attitudes and Values, Habits of Mind, and Professionalism.

As many assessment scholars have noted, not all outcomes result in learning, but may still be important to overall student success. Henning and Roberts (2016) described three types of outcomes: operational, learning and development, and program.

*Operational outcomes*—also called administrative outcomes, service outcomes, or outputs—are metrics that document how well the operational aspects of a program or an activity are functioning. For CSUB, this includes access to academic advisors as well as the efficiency and effectiveness of response to student (and others) inquiries.

*Learning and development outcomes* are desired learning and development effects of a program, a service, or an intervention, but are more specific than goals and are result-focused and participant-centered (Henning, 2009).

*Program outcomes* describe the desired aggregate impact of a program, a service, or an intervention. (p.88-89).

During our meetings with the advisors and advising coordinators, we asked them to participate in one of two activities. The first was to identify what students should learn from participating in academic advising (e.g., know, can do, value); advisors participated in this activity. The second was a planning activity in which advising coordinators participated (see Appendices C and D). We hope that the results of these two activities provide a start for CSUB to develop a unified vision and mission statement for academic advising as well as an assessment plan for outcomes. Decisions regarding what is important, what level of performance is acceptable, and how performance will be



measured are important ones for an assessment plan. Professional and faculty advisors and mentors should be involved in these discussions and planning efforts.

***Develop a curriculum for academic advising that addresses the needs of students as they enter, move through, and exit CSUB.*** Such a curriculum begins with a mapping of the student learning outcomes from point of entry, i.e., first-time in college or transfer student.

## **Equity, Inclusion, and Diversity**

### *Explanation of Condition*

Excellent academic advising demonstrates a commitment to the values and culture of inclusivity and social justice beyond merely equality of opportunity. Excellence calls for individual and institutional conversations that promote understanding, respect, and honor diverse perspectives, ideas, and identities. Academic advising policies and practices reflect a commitment to equity, inclusion, and diversity and, in turn, a commitment to universal design principles for learning.

### *Strengths*

CSUB has an expressed commitment to ensuring that the academic advising experience of all CSUB students is consistent and of high quality.

### *Challenges*

Designing and implementing a cohesive academic advising program responsive to the student needs of CSUB as a Hispanic-Serving Institution with a high percentage of First-Generation students is a challenge. In fact, it is the challenge facing CSUB.

Transparency of decision-making. While the recent decision to change the reporting structure for academic advisors has resulted in discussions about transparency in decision-making at the leadership level, the same can be said about decisions made within academic units. There is little communication among colleges about policies and practices. Unfortunately, this can lead to unintentional but unfortunate misinformation provided to students. One student who intended to have majors within different colleges expressed frustration in trying to navigate between Colleges.

### *Recommendations*

***Use Data and Evidence to Inform the Design and Implementation of a Cohesive and Responsive Academic Advising Program.*** Appendix B includes some information regarding CSUB students and their academic progression. In sum, CSUB data show an incredibly diverse student population with a high percentage of students who might be typically considered 'at risk' of succeeding due to some combination of first-generation status, Pell status, as well as Race/Ethnicity status. Significant literature exists on the support needs of all students and, in particular students first in their families to attend college or who may come from culturally or economically diverse backgrounds. That literature speaks to the extent to which these students need support with regard to college navigation, career direction, academic support, and a relationship with someone who has experience in higher education and cares about them. Reviewing the extensive data about CSUB students provided by Institutional Research, Planning, and

Assessment and the literature on serving Hispanic/Latinx students, first-generation students, and economically challenged students will assist CSUB in making data-informed decisions about academic advising. The consultants have identified some of this literature in the Selected Resources appendix.

Attention to these data will be important in planning the new proactive caseload management advising program (PCMAP) described under the “Organization” condition. Initial planning must consider the importance of having advisors available to spend an appropriate amount of time within initial advising sessions to review the first-year advising curriculum with students. These data also indicate the need for reviewing the FYE curriculum to include the skills needed for persistence and retention.

***Commit to Future Transparency in Decision-Making at All Levels of the Organization.*** In the interest of building trust, as CSUB moves forward with the recent structural change, engaging in the principles of shared governance for all members of the organization is important. This also applies to activities/reports that have not resulted in action.

## **Advisor Selection and Development**

### *Explanation of Condition*

Institutions employ effective and equitable selection, professional development, and appropriate recognition and reward practices for all advisors and advising administrators. Institutions and/or units establish clear expectations and requirements for all advisors as well as systems for formative and summative feedback to advisors to provide consistency for students and support program sustainability. Ongoing professional development programs reflect the institutional commitment to learning.

Professional development also ensures that all academic advisors are current in advising skills and knowledge and that advisors, through their advising practice, reflect the core values and competencies for excellent academic advising.

### *Strengths*

Professional and faculty advisors have many years of experience at CSUB and are committed to student success.

Many, if not most, professional advisors have master’s degrees.

### *Challenges*

Advisors lack a career ladder and are hired at the “bottom of the pay scale,” according to the interviewees. Professional advisors do not see any opportunities for advancement unless they vacate their positions and move to new roles both within and outside of the institution, where there may be increased salary potential. Many advisors prefer to remain and grow in their current positions. At CSUB, when advisors seek reclassification, it is often denied because all advisors with similar responsibilities would have to be reclassified, which would require additional non-existent funding.

There is no consistent University onboarding for professional or faculty advisors as it relates to the profession and practice of advising. There is little professional

development for faculty or professional advisors. Some colleges provide funding for professional development, but it is very inequitable. In some colleges it is very “hard” to get professional development funds and according to some, “there is always drama” when advisors ask for funding to attend conferences or other opportunities.

It is reported that advisors have responsibilities (or at least projects) within their units that are outside of their roles as advisors. Conducting an audit of advisor positions is highly recommended to identify these activities and to help facilitate, as necessary and appropriate, the resolution for the unit.

### *Recommendations*

***Review and Update Position Descriptions for Both Professional and Faculty Advisors.*** Descriptions need to clearly outline how and when professional and faculty advisors interact with students and their specific responsibilities. Once a shared vision, mission, and curriculum for advising are created, the information that must pass from advisor to student will be much clearer. Once established, roles and responsibilities must be clearly articulated and communicated.

***Design an Advising Career Ladder where Professional Advisors can be Promoted Based On Agreed-Upon Criteria (i.e., time in service, annual evaluation feedback, professional engagement, graduate education, etc.).*** It is important for advising stakeholders to be included in the conversations at various points during the development of a career ladder.

***Develop and Implement a Professional Development Program for all Faculty and Professional Advisors.*** Most needed at CSUB is professional development in the relational competencies of advising and the developmental, proactive, and strengths-based approaches to advising students. Both onboarding and continuing professional development should be included in this plan.

***Develop and Implement a Reward and Recognition Program for Faculty and Professional Advisors that Includes Internal and External Means of Recognition.*** Such a plan needs to be communicated to all relevant constituents.

## **Improvement and the Scholarship of Advising**

### *Explanation of Condition*

Institutions are committed to systematic assessment and evaluation to sustain continuous improvement and equitable achievement of learning outcomes. Institutions recognize the complexity of the educational process and embrace its theoretical underpinnings. As a result, institutions develop evidence-based plans for continuous assessment of both advisors and advising programs. Members of the academic advising community are expected to be both critical consumers of, and contributors to the scholarly literature, including the effects that advising can have on students and the role of advising in higher education.

### *Strengths*

Some interviewees spoke of the Professional Academic Advisor Collaborative (PAAC) but information about the goals, meeting schedules, and intended outcomes for the group was not clear. However, this Collaborative could be an excellent opportunity for advisors to discuss current literature related to academic advising, view advising webinars, collaborate to design professional development from within the group, and propose conference presentations if/when funding allows participation.

At least one college consistently verbally recognizes their professional advisor at college meetings and acknowledges their contributions to the college and the success of their students.

### *Challenges*

Advisors feel they do not have a voice at the University, and they are not respected. This interferes with advisors and faculty contributing to the scholarship of advising and minimizes the importance of advising for student success. This has resulted in apparently low morale and feelings of frustration among advisors. As noted by one interviewee, "They [professional advisors] have been stomped on for years."

Academic advising does not have a curriculum or process and student learning outcomes that could lead to an evidence-based assessment plan for advising. Although numerous surveys have been disseminated to move toward improved advising, professional advisors noted that no action plans or improvements have taken place.

There are no opportunities for advisors to participate in research related to the scholarship of advising and no plans to encourage, reward, or recognize such efforts.

In some centers, the physical space and resources need to be reviewed as professional advisors are advising in cubicles, compromising the confidentiality of advising appointments.

An assessment plan for the academic advising program needs to be created and implemented. This is addressed in more detail under the "Learning" condition.

### *Recommendations*

***Engage Advisors as Members of the Recommended Advising Council and Other Related Committees and Work Groups.*** These are opportunities to give advisors "voice", will assist in improving advising, and also recognize advisors for their competencies and insights.

***Encourage Scholarly Engagement and Participation through Shared Readings, Webinar Viewings, and Other Professional Development Opportunities and Provide the Time to Participate in Them.*** Collaborate with PAAC to provide opportunities for increased scholarly work and improvement of the advising culture and practices.

***Seek Increased Opportunities to Recognize and Reward Advisors for Their Work Within the Colleges and Throughout the University.*** Well-designed recognition and reward programs increase morale and minimize stress points for advisors.

***Review Physical Spaces for Advising.*** Physical spaces are essential to safeguard the confidentiality of advising appointments and to provide a comfortable and safe environment for students to discuss their experiences, triumphs, and challenges. As with all physical spaces, accessibility must be a consideration.

## **Collaboration and Communication**

### ***Explanation of Condition***

Effective academic advising requires coordination and inclusive collaborative partnerships among stakeholders across campus. These partnerships foster ongoing communication, promote artifact and resource sharing, and support creative solutions for the success of all students. A collaboratively developed strategic communication plan involves frequent and intentional exchanges of information and ideas, is routinely reviewed and updated, and advances a shared aspirational vision for academic advising as integral to teaching and learning.

### ***Strengths***

All constituent groups at CSUB recognize the need for an intentional and structured communication plan that is understood by all.

There are some strong existing partnerships within the University, some of which have been recently strengthened such as Enrollment Services and Academic Advising.

### ***Challenges***

There is no intentionally crafted structure of communication. Communication is critical for faculty and professional advisors to provide students with accurate and timely information. In the absence of a way to receive timely and accurate information and curriculum changes, students may receive inaccurate information and develop a lack of trust in advising. In the review interviews, advisors ranked consistent and transparent communication as the number one thing they needed, and wanted, to do their work. As noted in the interviews, this is even more important now that two divisions are working together to provide effective, consistent, and quality advising: Academic Affairs and Strategic Enrollment Management and Student Support. Information coming from the Curriculum Committee needs a direct pipeline to all advisors and those who have a need to know.

There is a lack of consistent, informative, and necessary campaign communications with students who are “Ready to Advise” according to Admissions processes as the timing and messages vary from college to college. In the absence of such messages, students may be confused, frustrated, and choose to study elsewhere. Admissions can only respond to these students with a very generic message such as, “You will hear from them [the college of their major].” Saying anything else may not be correct as each college has different messages and times that new students will be advised.

There is a need for standardized terminology for the forms, functions, and procedures that is understood by all advising constituents and collaborators.

It is hard for students to find and complete forms for regular processes such as change of major, the processes sometimes take a long time, and practices for completing and submitting forms are not consistent across the colleges.

#### *Recommendations*

**Develop a “Communication Plan” for Faculty, Professional Advisors, and Students.** Create a sustainable, intentionally crafted “Communication Plan” that is inclusive, well-documented, and well understood. The plan needs to provide a clear communication pipeline of information to all advisors, faculty advisors, and related constituents who need to know. Communications need to include, but may not be limited to curricular, catalog, degree audit, and policy changes that may impact advising practice. Advisors should be expected to attend academic department meetings and events to glean information specific to their assigned program areas and anticipate the impact of decisions on advising. Some advisors currently attend department meetings, but this is inconsistent across colleges.

A communication plan is designed to assure that information flows between and among all departments and advisors, from administration to faculty and professional advisors, and describes who will distribute each type of information and how often. There is a need to create such a plan for all professional and staff advisors to have intentional touchpoints to collaborate and gain knowledge from one another.

**Conduct a Review of the Communication Campaigns Used by Each College to Newly Accepted and “Ready to Advise” Students and Assure Consistency and Timely Messaging.**

### **Organization**

#### *Explanation of Condition*

Excellent advising programs are intentionally structured across the institution to meet the institutional academic mission, goals, and intended learning outcomes. The organization of academic advising must have leadership, appropriate resources, and a systematic approach to continuous assessment and improvement. The organizational structure supports equity in the academic advising experience as well as the roles of all academic advisors, regardless of title.

#### *Strengths*

The recent organizational change provides an opportunity for conversations about academic advising to focus on the needs of the students at CSUB and take advantage of the breadth of expertise of advisors and faculty.

The appointment of an interim director of advising with support from the Academic Senate is a reinforcement of CSUB’s commitment to improvements in academic advising.

#### *Challenges*

CSUB does not have a collaborative framework for coordinating academic advising. It will be important for CSUB to identify a mechanism through which issues related to

academic advising can be systematically addressed. The establishment of a collaborative and inclusive university-wide Advising Council can serve as this mechanism and be utilized as a way to facilitate and support the transition to a more cohesive academic advising program.

CSUB needs to de-tether academic advising from scheduling and course registration. While CSUB advising materials indicate that students should connect with their advisors, in reality, the ability to schedule an in-person or walk-in appointment is limited. The implications of this are noted under “Student Purpose and Pathways.”

Access and consistency of access to academic advising needs to be improved. As noted, access to academic advising beyond specific advising or enrollment periods is critical for all students and should not be delimited by the availability of the course schedule. Several students expressed a desire to meet with an advisor but found it difficult to do so outside of the advising or enrollment periods; others experienced recurring cancellations of appointments. Further, with few exceptions, students indicated they “simply gave up” trying to meet with an advisor and either self-advised or relied on family and friends for assistance.

The conversation about academic advising needs to be restarted with a focus on what is relevant to student needs, interests, and motivations. Much, but clearly not all, of what we heard from professional advisors and faculty members focused on their needs and the needs of departments. As a Hispanic-Serving Institution with a high percentage of First-Generation college students, the conversations need to pay closer attention to what the literature says about Hispanic/Latinx and First-Generation students, what the institution, advisors, and faculty know about CSUB student needs, and also what CSUB students say—and have been saying—regarding their expectations and needs with respect to academic advising. Appendix E in this document offers a summary of the responses to an activity the consultants asked students to complete. The results of this activity align with survey data gathered by the ASI at CSUB, the Student Outcomes of Advising Survey conducted by CSUB in 2023, and the pattern the NACADA EAA project managers have seen from the Outcomes Surveys of over 25 EAA participating institutions: *Students want to have conversations about their career interests related to their majors and interests early in their college experience.* The students with whom we spoke indicated that most had never had a conversation with any advisor about career opportunities and those who did had those conversations during their senior year of college.

### *Recommendations*

***Establish an Advising Council with Institution-Wide Representation the Includes Individuals from the Colleges, Faculty Governance, Professional Advisors, Strategic Enrollment Management and Student Support, and Student Affairs.***

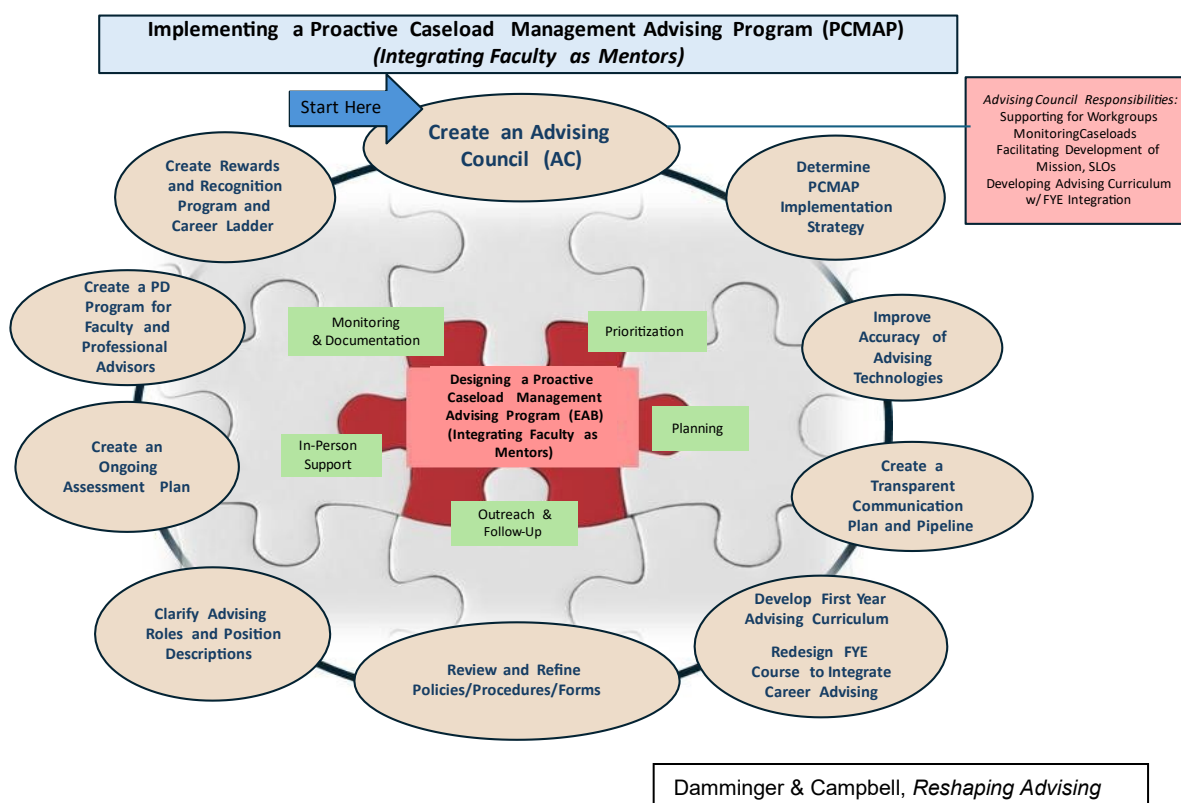
This Council should consider having representatives from areas such as Institutional Research, Admissions/Strategic Enrollment Management and Student Support, Orientation, Registrar, Financial Aid, and others. Regular meetings can include updates and preparation for upcoming registration cycles as well as training and professional development opportunities. This Council could facilitate the establishment of workgroups to support the improvement of areas important to advising, i.e., technology, policies and practices, etc. as well as a venue for discussions about issues facing an incoming class,

such as course availability. The Council will also have responsibility for monitoring the implementation of the Proactive Caseload Management Advising Program (PCMAP).

**Create the Proactive Caseload Management Advising Program (PCMAP)** Along with structural and reporting changes CSUB, through Strategic Enrollment Management and Student Support, has advanced the concept of case management as central to academic advising at CSUB. As with other terms used in higher education, e.g., assessment and evaluation, the term ‘case management’ carries many connotations. Those in health care professions hold very specific definitions of case management and what that means with regard to their patients. In academic advising, references are made to case management and also a related term, caseload management. The consultants recommend a *Proactive Caseload Management Advising Program (PCMAP)* that they adapted from EAB’s caseload management model. Prior to rolling out a model, CSUB needs to consider the timing, resources (financial, human, and physical space), accountability tracking, and assessment to implement an effective model that matches their needs (see Figure 1).

**Figure 1**

*Proactive Caseload Management Advising Program Concept Map*



The intention at CSUB, as the consultants understand it, is to connect (assign) students to professional advisors within the students’ desired college and major at the point of entry and have advisors follow students’ through to graduation. In addition to policies and procedures, professional advisors would focus on facilitating the development of an



educational and career plan. Major-related faculty advisors would serve as students' mentors regarding career and job opportunities and preparation for graduate school and post-baccalaureate programs. The timing of the assignment of a faculty mentor may not be at students' entry to CSUB but would occur at some point thereafter. Monitoring student progress to graduation would be the responsibility of the professional advisor at various touchpoints and milestones. *This clarification is essential to designing a workable model for academic advising at CSUB (see Appendix F).*

Once the conceptual framework for the Proactive Caseload Management Advising Program (PCMAP) is clarified, mapping the student experience through the system needs to occur and touchpoints or milestones that require advisor interaction should be identified. While colleges and departments may identify additional touchpoints or milestones for their own students, it is important to identify those that all students should experience as part of academic advising. These touchpoint/milestones should represent important points of conversation about academic progress, career exploration, reflections on coursework as well as future goals, recommendations for networking, and connections to high impact practices. *This mapping should inform the components of an advising curriculum and the assessment plan as well as the training and professional development for all professional advisors to assure a consistent initial advising experience for all students.*

***Develop a Phased Implementation Plan for the Proactive Caseload Management Advising Program (PCMAP).*** In Appendix H, the consultants have offered ideas regarding timing and implementation of a Proactive Caseload Management Advising Program (PCMAP). The first column represents tasks that need to be completed prior to the beginning of the Fall 2025 semester regardless of whether CSUB commits to a phased "all-college" or a "single college" implementation.

We offer two options for phased implementation:

***Option A: All-College Implementation Model***

- a) All Fall 2025 incoming new students (first time and transfers) would be assigned professional advisors within their college/major. Appointments for initial advising need to allot a minimum of 45 minutes.
- b) A plan to handle the advising of continuing students needs to be developed in a way that provides more access to advising than is currently available.
- c) An advising curriculum for the first year (for first-time students and transfers) needs to be developed by the start of school; preferably by the time students register for their first term. In addition, an automated checklist of initial advising topics that need to be discussed for accountability and tracking also needs to be developed.
- d) FYE courses need to be revised to include a career advising and exploration module.
- e) The Advising Council would be responsible for monitoring implementation progress, keeping the Academic Senate apprised.

***Option B: College by College Implementation Model***

- a) A single college would implement the Proactive Caseload Management Advising Program (PCMAP) for incoming students (new first time students

and transfers). Information gleaned from this implementation would be used to make improvements to the model for subsequent rollouts. A schedule for additional college rollouts would need to be developed.

b) See b) through e) in **Option A**.

***Review FYE Course for Better Integration into the Academic Advising Experience of Students by Incorporating a Career Advising and Exploration Component into All Sections.*** The FYE course is required for all CSUB students. Some programs and majors have developed specific FYE courses for their students. The FYE course is a curricular opportunity to also advance elements of an advising curriculum for entering students, particularly with regard to career advising and exploration. In fact, utilizing the FYE course to help facilitate the development of an educational and career plan would support the overall academic advising program at CSUB. The FYE course, along with perhaps Orientation, could serve as an anchor to the academic advising experience for all students. This applies to both newly admitted first-time and transfer students.

## **Student Purpose and Pathways**

### *Explanation of Condition*

Effective academic advising provides learning spaces for all students to engage in critical thinking and to define their own purpose, goals, and curricular pathways through exploration to achieve learning outcomes. Students' plans must be coherent, enrich their programs of study, and equitably support their educational goals, career, and life aspirations. Partners and key stakeholders collaboratively and closely examine all student transitions and develop policies and practices to overcome barriers and optimize learning and success.

### *Strengths*

A student spoke very highly of Study Abroad advising and commented on how much the advisor cares.

CSUB has a First Year Experience course, a resource for students that is considered a recommended high-impact practice. The course content and consistency was addressed in the "Organization" condition and will be mentioned in "Challenges" and "Recommendations."

As noted, CSUB has a student orientation that is also known as a high impact practice; however it differs with each college. It was noted in the interviews that many students who attend orientation in July or August have not yet registered for classes and since it is not included in the orientation, students sometimes choose to study elsewhere.

An advisor spoke of tracking their advising sessions through anecdotal notes in RunnerConnect and mentioned that in each advising session she refers her students to new resources to consider.

### *Challenges*

Most of the students who met with us mentioned their frustration in trying to get an advising appointment and the frequency of advisors cancelling advising appointments at

the last minute with most frequently giving the only reason that “we can’t see you now as we are only seeing XXXX students now.” In the words of one student, “For the last yearish, I have given up on advising.”

Several students mentioned they had to delay their graduation due to misinformation from advisors. Although students have a shared responsibility in the academic advising process, delaying graduation due to misinformation is not acceptable and needs to be addressed.

There is limited, if any, collaboration between academic advising and tutoring. Academic advising is a process that can connect students with resources needed to be successful. It was noted in the interviews that tutoring seldom sees any students who have been referred by advising. Although we know that students do not follow all the advice provided in advising appointments, the lack of referrals is not customary. EAB Navigate has the potential to make such referrals and could spearhead a much more proactive approach to tutoring where tutoring does not have to wait for a student to present but could reach out to the student for tutoring.

As noted in the “Communication and Collaboration” section, improvement is needed in the processes, forms, and efficiency of practices such as change of major, dropping and withdrawing from classes, and transfer equivalencies to provide timely completion of these processes and not interfere with students’ progress toward a degree.

Account “holds” are used arbitrarily and vary in each college. This causes confusion for students (they do talk to one another) and in some colleges the hold can be removed without seeing an advisor negating the need for the hold at all.

Data indicate that the FYE course is the “highest failed course” at CSUB.

There appears to be two levels of advising for student-athletes as is customary where student athletes see a contact in the athletic department and an advisor in their major. There is not a dedicated advisor in the Advising Centers and due to the inaccessibility of advisors at certain times during the year, these practices could interfere with student-athlete compliance.

### *Recommendations*

***Advising Needs to be Available and Accessible to all Student Populations Year-Round.*** In our experience, the stop and start of access to advisors and advising appointments for different student populations is unique to CSUB and is not a recommended practice.

As the University moves to a new proactive caseload management model for advising, it will be imperative to have a master schedule prepared in advance so that advising can take place all year, an educational plan can be followed, and although registration may not be available, students can prepare for the upcoming registration period in advance.

***Strengthen the Collaboration between Advising and Tutoring.*** Hold advisors and faculty accountable to use the available technologies for referring students to tutoring and other support services, as needed.

***Review the Processes and Correct the Inefficiencies Related to Forms Used for Necessary Advising-Related Tasks at the University.***

***Revisit the Use of Holds.*** If continued, implement consistent and effective processes for their use.

***Review the Curriculum of the FYE Course.*** As noted, develop and include a much-needed career advising component that includes the completion of self-assessments related to interests, major choice, and pathways to desired career opportunities.

***Review the Components of Orientation.*** Consider ways to include academic advising for those who have not yet registered for classes.

***Conduct a Review of Advising for Student-Athletes.*** Consider if a professional advisor in each college could be assigned to student-athletes to provide athletes timely access to that advisor.

## **Technology Enabled Advising**

### ***Explanation of Condition***

Excellent academic advising incorporates appropriate and accessible technology to complement, support, and enhance advising practice to facilitate learning success for all students. This requires institutions to include academic advisors in the selection, delivery, and assessment of advising technologies. Institutions must provide on-going training in the use and potential applicability of dynamic tools as a means to strengthen advising management, practice, student learning, and culture.

### ***Strengths***

CSUB has invested in a variety of advising technologies to support academic advising. The following were mentioned during the interviews: People-Soft, Service Now, Degree Audit, SharePoint, On-Base, EAB RunnerConnect, EAB Navigate, Course Leaf, Catalog First, and Ask Rowdy.

Over the last three years, there have been some improvements to the catalog.

### ***Challenges***

Many of the available advising technologies, such as EAB Navigate, are not being used to their potential and are used differently from college to college, by faculty advisors, by professional advisors, and by administrators, thus requiring the use of multiple software tools to effectively advise students. Advisors spend a good deal of time researching students' records because they do not trust the technologies that could provide this information succinctly and efficiently. This results in inefficient and inconsistent use and requires additional time during advising sessions. As noted by one interviewee, "They [those who advise] can't do that [use EAB Navigate] because that is time they do not have."

The available technology tools are often inaccurate and therefore mistrusted by those who need to use them for knowledgeable and accurate student advising.

There appears to be a “one-person team” who is responsible for accurate information within each tool. This person is often charged with important, but interfering projects, that get in the way of troubleshooting the problems and inaccuracies of advising technologies such as the catalog and degree audit.

### *Recommendations*

**Conduct a Review of Advising Technologies.** Where possible, embed access to some within others to result in fewer tools needed for accurate and effective advising. Once accurate data can be accessed, advisors will be equipped to reach out proactively to students to provide timely and holistic, developmental advising and move beyond advising for scheduling and registration. Advisors will have better tools to identify and interact with at-risk students.

**Assess the Inaccuracies of Software Used in Advising.** Determine the issues involved and hire the employees needed to fix the systems, such as programmers, even if only needed on a part-time basis until the systems are operating correctly. Explore collaboration with the chancellor’s office to assist with corrections and support retrieval of accurate data. Improve the forms and processes needed to update the catalog and degree audit assuring the timely flow of information to those who need to know and quickly resolve problems. Refine the error-checking processes at the front end so issues are resolved, and advisors are not asked to “prove a problem” that may be outside of their purview and expertise. Early detection and correction of available advising tools will build trust in their use and encourage professional and staff advisors to use them effectively.

**Provide Professional Development/Training for the Use of Advising Technologies.** Develop and implement policies on the required use of advising systems and hold users accountable to learn about, and use, the available tools. Put accountability measures in place to ensure consistency across all colleges.

## CONCLUSION

CSUB is uniquely positioned to design and implement an advising program that meets the needs of CSUB students and provides a consistent and positive advising experience for all. This academic advising review was designed to evaluate what is working well for students at CSUB and suggest areas for improvement. The review uncovered what internal groups, external reviewers, and student surveys discovered previously regarding academic advising and the need to increase access to advising for all students, design a consistent advising experience, clarify the roles and responsibilities and enhance the collaboration of faculty and professional advisors, build a culture and plan for transparent communication, create and implement an advising assessment plan, and improve the accuracy and reliability of advising technologies and tools .

Most certainly CSUB is looking critically at many areas for improvement to build an academic advising program. To lead the implementation of improved advising strategies as outlined in the report, we suggest a newly formed Advising Council and co-leadership with the someone from Strategic Enrollment and Student Support and a representative of the Faculty Senate.

This approach will help with buy-in and infuse the momentum needed to bring about a change in advising culture and practice.

Recommendations outlined in this report will help support the structure, policies, processes, practices, and advising tools that promote efficient and effective academic advising. The consultants believe this report can be used as a guide to provide recommendations as the University moves towards an advising program built on the development of a relationship between the student and advisor where conversations take place that lead to students' exploration of educational, career, and personal goals.

In conclusion, the NACADA consultants were proud to partner with CSUB for this academic advising review. We thank CSUB for hosting us during our visit and for the opportunity to discuss academic advising with the advising partners and supporters. We particularly thank Dwayne Cantrell and Jennifer Mabry. Throughout the visit, it was evident that the advising community at CSUB is deeply committed to the success of their students. The University is committed to improving academic advising for all students, and most importantly, identifying ways to effectively support student success. Conversations during our visit led us to believe the institution will proceed with enthusiasm and with the right combination of speed and careful planning. We applaud the University's commitment to undertaking change on behalf of students, and trailblazing a path for the institution by developing a solid, robust model for the design and delivery of academic advising. This report can be used as a living document to support the institution in its strategic planning efforts. Leadership at CSUB is in a strong position to greatly impact the institution's student success goals. As always, NACADA is available to serve as a resource partner as steps are taken to explore and implement the recommendations provided in this report.

**APPENDIX A: AGENDA**  
**NACADA Program Review 3-Day Visit Agenda**  
**March 10, 2025 – March 12, 2025**  
**DLC 402D**

**Day 1**

8:00 a.m. - 8:45 a.m.

Opening Session w/ President's Cabinet

- Dr. Dwayne Cantrell- Vice President, SEM
- Dr. Kristen Watson – Interim Vice President, Business and Administrative Services/Chief of Staff
- Dr. Thomas Wallace – Vice President, Student Affairs
- Dr. James Rodriguez – Interim Provost and Vice President, Academic Affairs
- Lori Blodorn, Vice President, People and Culture
- Heath Neimeyer, Vice President, University Advancement
- Kyle Condor, Director of Athletics

8:45 a.m. - 9:45 a.m.

Academic Advisors, Session 1

10:00 a.m. - 11:00 a.m.

Enrollment Services

- Sonya Gaitan, Asst. Director of Enrollment Services
- Melissa Hernandez, Sr. Admissions Officer
- Carmen Padilla, Sr. Admissions Officer
- Dena Dominguez, Graduation Specialist
- Rosio Hinzo, Articulation Officer
- Courtney Earnest, Transfer Specialist
- Christina Lopez, Registrar Coordinator

11:00 a.m. - 11:15 a.m.

Break

11:15 a.m. –12:00 p.m.

College Deans and Associate Deans

- Dr. Jane Dong, Dean NSME
- Dr. Karlo Lopez, Associate Dean NSME
- Dr. Alicia Rodriguez, Interim Dean AH
- Dr. Steven Gamboa, Interim Associate Dean AH
- Dr. Luis Vega, Interim Dean SSE
- Dr. Terry Hickey, Associate Dean SSE
- Dr. Deborah Cours, Dean BPA
- Dr. Lori Paris, Associate Dean BPA
- Dr. Elizabeth Adams, Dean Antelope Valley

12:00 p.m. – 12:45 p.m.

Lunch

12:45 p.m. – 1:30 p.m.

Enrollment Systems (Advising Technology)

- Cindy Zuniga-Prado, Academic Advising Analyst
- Ivonna Edkins, Sr. Coordinator of Student Success Systems

1:30 p.m. – 2:15 p.m.

Interim Director of Advising

- Dr. Anayeli Gomez-Navarro

2:15 p.m. – 2:30 p.m.

Break

2:30 p.m. – 3:15 p.m.

Senate Executive Committee

- Dr. Melissa Danforth, Chair
- Dr. Danielle Solano, Vice Chair
- Dr. Nyakundi Michieka, CSU Senator
- Dr. Charles Lam, CSU Senator
- Dr. John Deal, AAC Chair
- Dr. Tiffany Tsantsoulas, AS&SS Chair
- Dr. Di Wu, BPC Chair
- Dr. Zachary Zenko, FAC Chair
- Dr. Aaron Hegde, Immediate Past Chair
- Dr. James Rodriguez, Interim Provost & VP for Academic Affairs

3:15 p.m. – 4:30 p.m.

Consultants Debrief

4:30 p.m. – 6:00 p.m.

Dinner with VP Dr. Dwayne Cantrel, AVP Dr. Jennifer Mabry, and Interim AVP Dr. Adams

## California State University-Bakersfield

### Day 2

8:30 a.m. - 9:30 a.m.	Advising Coordinators <ul style="list-style-type: none"><li>• Belen Mendiola, BPA</li><li>• Yvette Morones, SSE</li><li>• Jeannie Ballesterio, NSME</li><li>• Adriana Sixtos, AH</li><li>• Melissa Miller, Antelope Valley</li></ul>
9:30 a.m. – 10:30 a.m.	Students
10:30 a.m. - 10:45 a.m.	Break
10:45 a.m. – 11:45 p.m.	Department Chairs
11:45 p.m. – 12:30 p.m.	Lunch
12:30 p.m. – 1:30 p.m.	Data Collection <ul style="list-style-type: none"><li>• Dr. Monica Malhotra, AVP Institutional Research</li></ul>
1:30 pm – 2:30 pm	Academic Affairs Leadership <ul style="list-style-type: none"><li>• Dr. James Rodriguez, Interim Provost &amp; VP for Academic Affairs</li><li>• Dr. Elizabeth Adams, Interim AVP of Academic Affairs</li><li>• Dr. Debbie Boschini, AVP of Faculty Affairs</li></ul>
2:30 p.m. – 2:45 p.m.	Break
2:45 p.m. - 3:45 p.m.	Academic Advisors, Session 2
3:45 p.m. – 4:45 p.m.	Faculty

### Day 3

8:30 a.m. - 9:30 a.m.	Student Affairs Leadership <ul style="list-style-type: none"><li>• Dr. Thomas Wallace, VP Student Affairs</li><li>• Dr. Markel Quarles, AVP Student Services</li><li>• Ilaria Pesco, AVP Student Success</li><li>• EJ Callahan, AVP Student Centered Enterprises</li><li>• Emily Callahan, AVP &amp; Dean of Students</li></ul>
9:30 a.m. – 10:30 a.m.	Student Support Services <ul style="list-style-type: none"><li>• Tanae McCall, Lead Financial Aid Counselor</li><li>• Veronica Bethea, Director of Outreach, Access, and Support</li><li>• Crystal Montoya, Director of New Student and Family Programs</li><li>• Jacob Whitaker, WRC/Tutoring Center Coordinator</li></ul>
10:30 a.m. – 10:45 a.m.	Break
10:45 a.m. – 11:30 a.m.	Kegley Center for Student Success (Athletics Advising) <ul style="list-style-type: none"><li>• Andrew Dickenson, Associate Athletics Director for Academic Services</li><li>• Dr. Kyle Susa, Faculty Athletics Representative</li></ul>
11:30 p.m. - 1:00 p.m.	Pizza Lunch w/ Students
1:00 p.m. – 2:00 p.m.	Consultants Debrief
2:00 p.m. - 3:00 p.m.	Debrief with VP Dwayne Cantrell and AVP Jennifer Mabry
3:00 p.m.	Depart for Airport



## APPENDIX B: ABOUT CSUB

California State University-Bakersfield (CSUB) is a moderately sized university that, by higher education standards, is relatively new at 50 years old. Recently classified as one of 12 California State Universities a “Research College and University by the Carnegie Foundation for the Advancement of Teaching, CSUB serves undergraduate, post-baccalaureate students, graduate students, and the community through the many baccalaureate, masters, doctoral, and certificate programs and courses that are available. There are four Colleges within CSUB: Arts & Humanities (AH), Social Sciences and Education (SSE), Natural Sciences, Mathematics, and Engineering (NSME), and Business and Public Administration (BPA). CSUB also has expanded its offerings through the Antelope Valley campus. Antelope Valley’s degree programs and courses are extensions of programs and courses offered by the four Colleges within CSUB. The Antelope Valley campus has a Dean who is part of the Provost’s Council and who works collaboratively with the other academic units of CSUB.

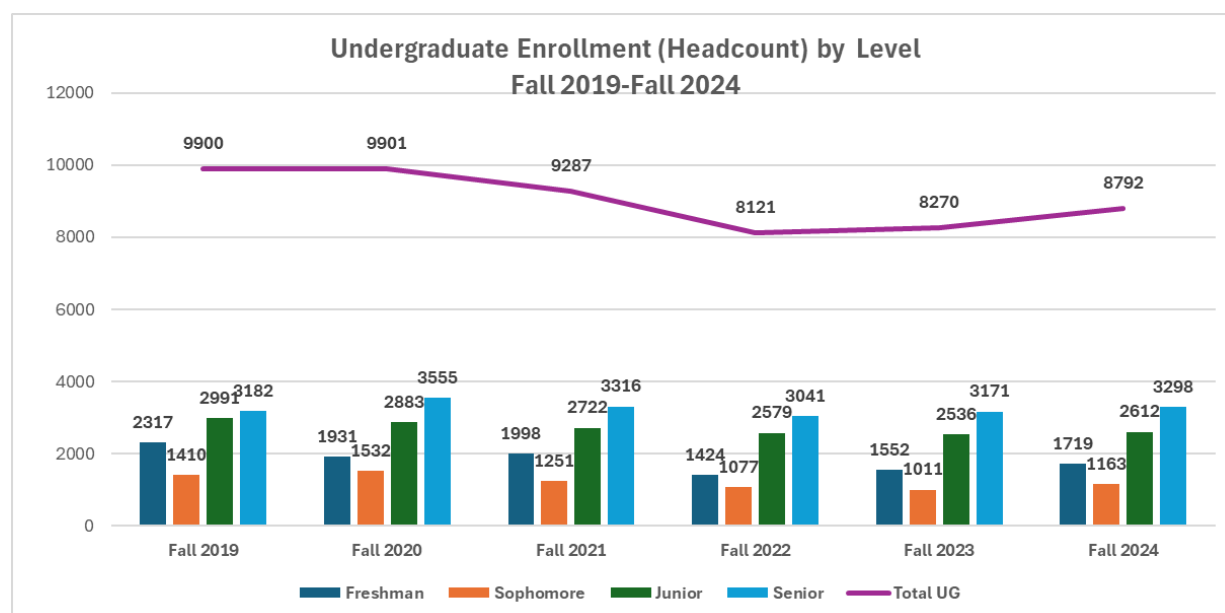
Over 60 percent of CSUB’s enrollment is Hispanic/Latinx (68%); this holds true at both the undergraduate and graduate levels. The second largest student population is self-classified as White at 13%, with Asian Americans at third at 6%, and Blacks/African Americans fourth at 4%. (Source: 2024 CSUB Data Dashboards). CSUB is designated as a Hispanic-serving institution; overall over 70% of CSUB’s enrollment is comprised of URM (under-represented minority) students. Further, 42% of CSUB’s undergraduate enrollment is first-generation and CSUB also has a significant incoming student enrollment of transfer students, the latter mostly from local or regional community colleges. The following snapshot offers a quick profile of CSUB’s Fall 2024 undergraduate enrollment of 8792 students (excluding post-baccalaureate students).

**Fall 2024** (*Data Source: CSUB Student Dashboards*). Of the 8792 undergraduate degree-seeking students enrolled in Fall 2024:

- 77% were less than or equal to 24 years of age
- 69% were self-identified as Hispanic/Latinx
- 29% were Newly Admitted Students while 68% were Continuing or Returning Students
- 42% were First Generation (students whose parents had no post-secondary experience)
- 65% were First Generation (if students first in their families to pursue a baccalaureate degree are included)
- 65% Female

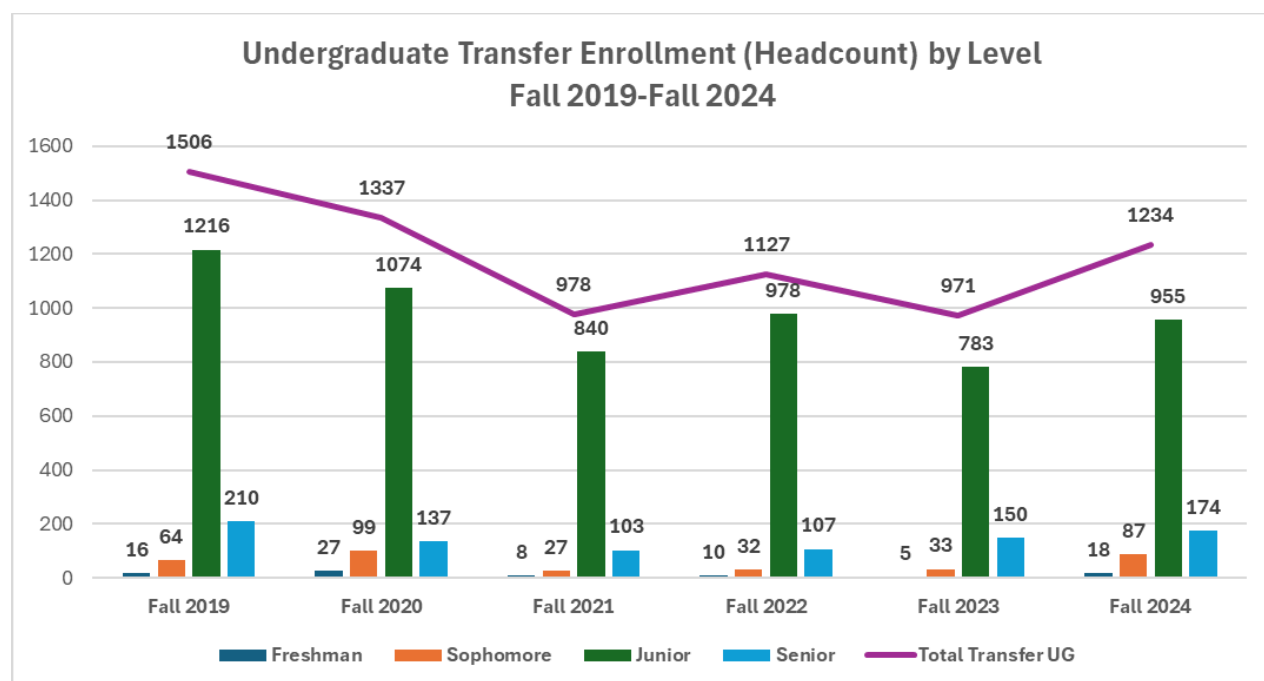
In addition, a quick review of Fall 2023 data reveals that almost 39% of CSUB undergraduate students fall into three (3) ‘at risk’ populations: *First Generation, Underrepresented Minority, and Pell Grant recipients. For the Fall 2023 term, the 39% represented over 3,000 undergraduate students.* Even while the number of students enrolled has fluctuated—particularly during the COVID years--this profile has remained fairly stable over time. This includes the high percentage of students who are represented in the three ‘at risk’ populations (Source: CSUB Student Dashboards).

**Overall UG Enrollment.** Since 2019, as with other institutions of its type, undergraduate enrollment at CSUB has declined, yet has begun to climb closer to the institution’s pre-pandemic levels, particularly at the freshman and sophomore levels.



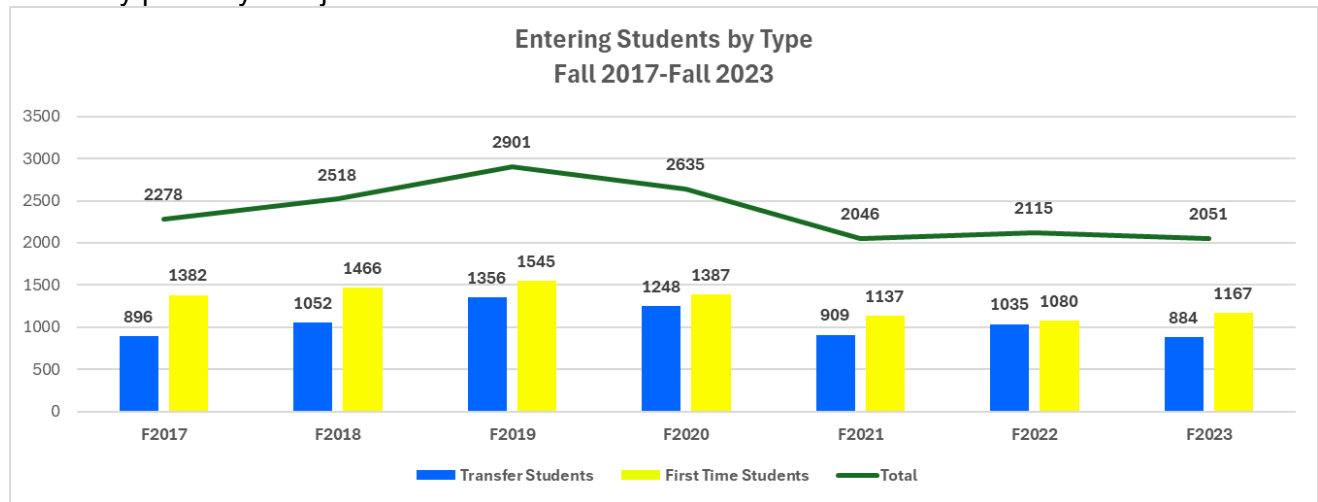
*Note: These data do NOT include post-bacc or credential students. Headcount includes both part-time and full-time students.*

The number of transfer students by level has also begun to increase.



Obviously, the overall enrollment pattern has implications for curricular planning particularly as it relates to the schedule of classes not only for continuing students, but also for newly admitted students.

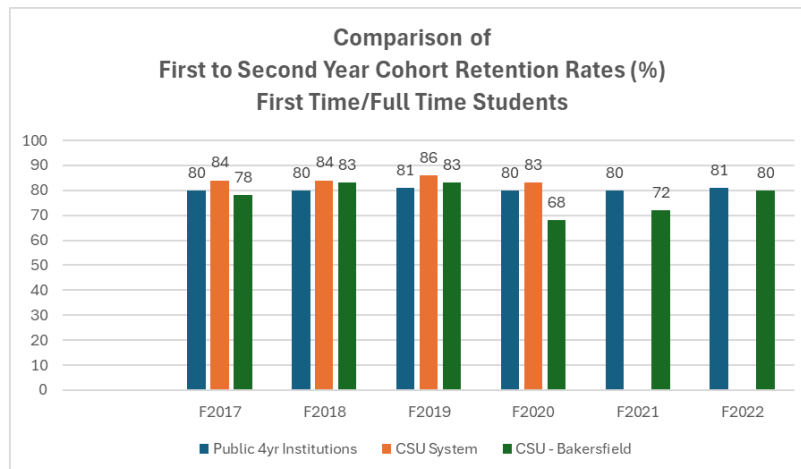
**Entering Undergraduate Students.** The profile of students entering CSUB is comprised of both first-time in college students and transfer students. Transfer students, as previously noted, enter the university primarily with junior or senior status.



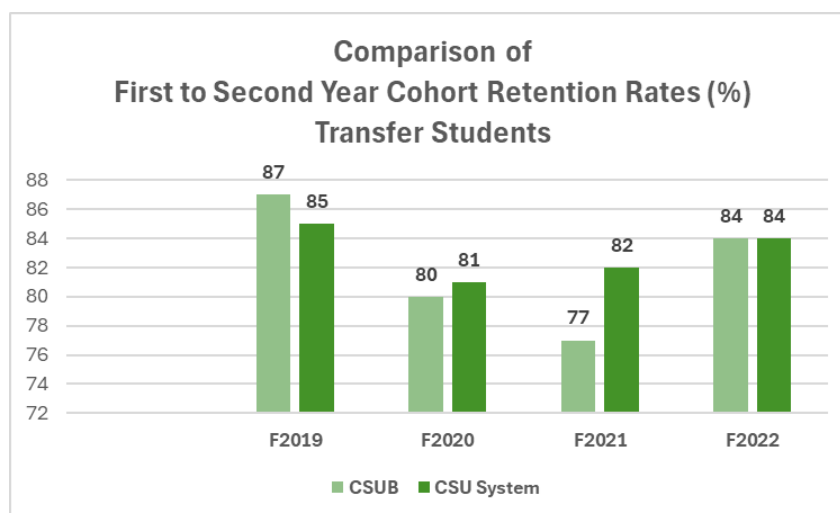
The majority of transfer students enter as juniors or seniors. Particularly for this population, as well as for all continuing students classified as junior and seniors, timely graduation, while affected by many things, is certainly dependent upon the availability of accessible course offerings. Thus, paying close attention to changes in student entry and progression will continue to be important to CSUB as any shifts in enrollment occur.

**Persistence, Retention and Graduation Rates.** IPEDS makes a clear distinction between the terms *Persistence* and *Retention*. The former relates to the extent to which students continue to pursue their education at *any* institution for the 2<sup>nd</sup> year, whereas Retention refers to students who continue to enroll at the *same* institution. For consistency, this summary focuses on Retention and Graduation rates, keeping in mind that efforts to increase Persistence rates should not be ignored as these have positive effects on Retention and Graduation.

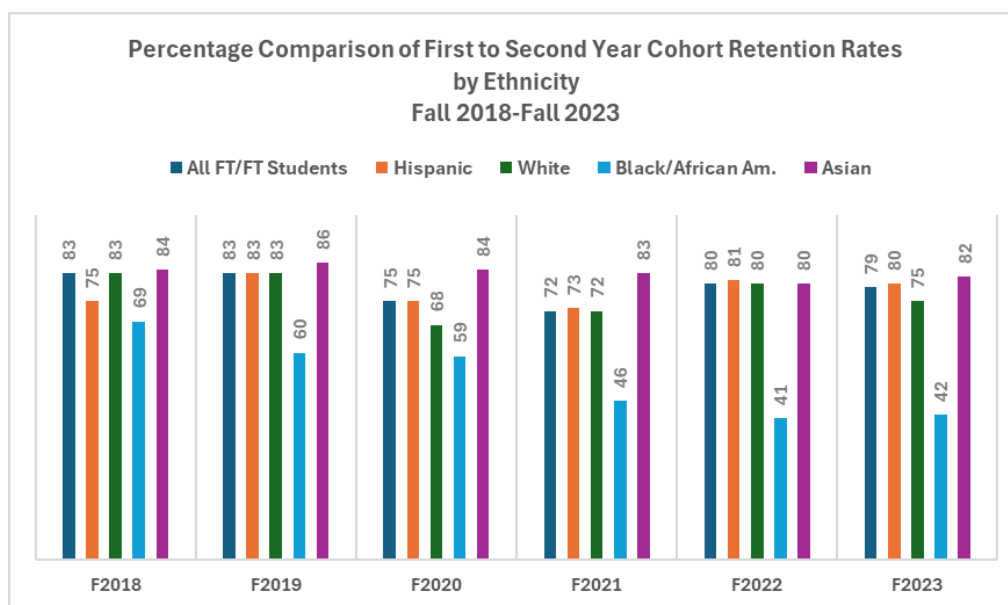
**Undergraduate Retention at CSUB.** A comparison of CSUB's 1<sup>st</sup> to 2<sup>nd</sup> year retention rates for FT/FT students with National Clearinghouse data and CSU System data shows that, along with overall enrollment, retention rates have been increasing since the pandemic.



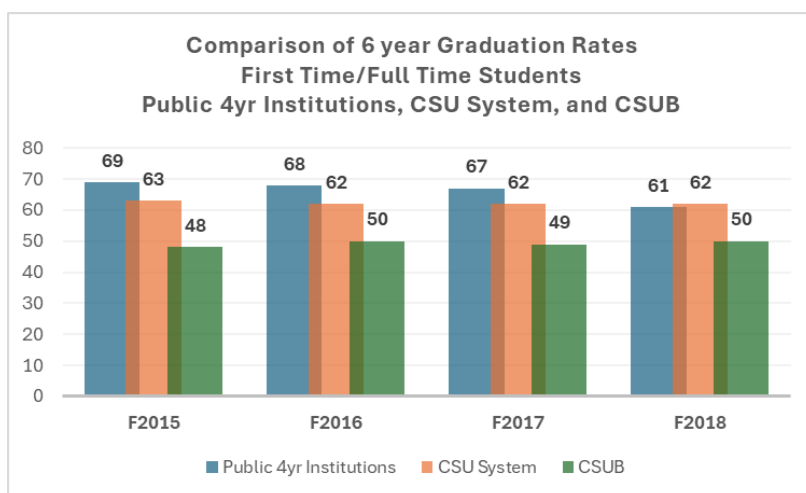
The same seems to also hold true for entering Transfer students.



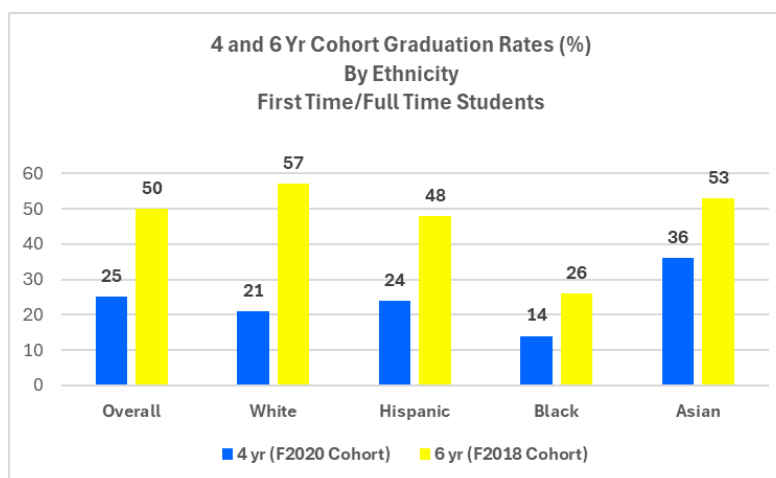
**Retention Rates by Ethnicity.** A review of CSUB's Retention Rates by Ethnicity begins to reveal where rates of progression begin to diverge. The same holds true for 6-year Graduation Rates.



**6-Year Graduation Rates.** For First Time/Full-Time students the graduation rates for CSUB students (according to data located) fall behind that of the CSU System as a whole and that of the National Clearinghouse data for Public 4-year institutions.



As with Retention Rates, 6-year Graduation Rates vary by Ethnicity.

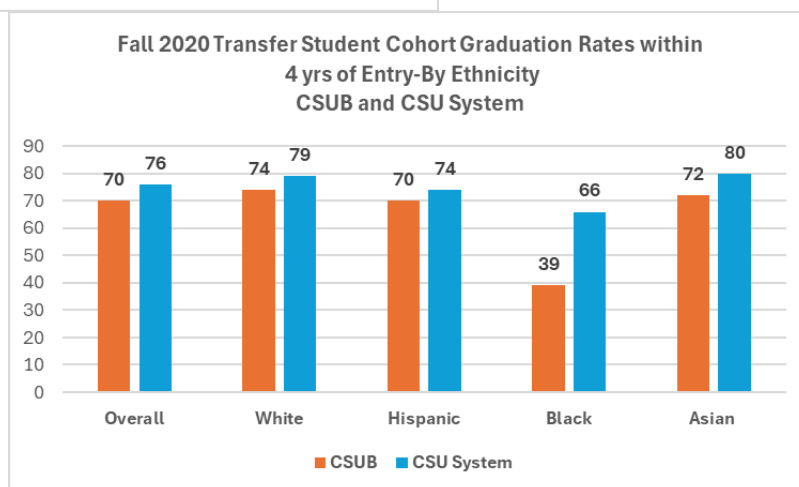
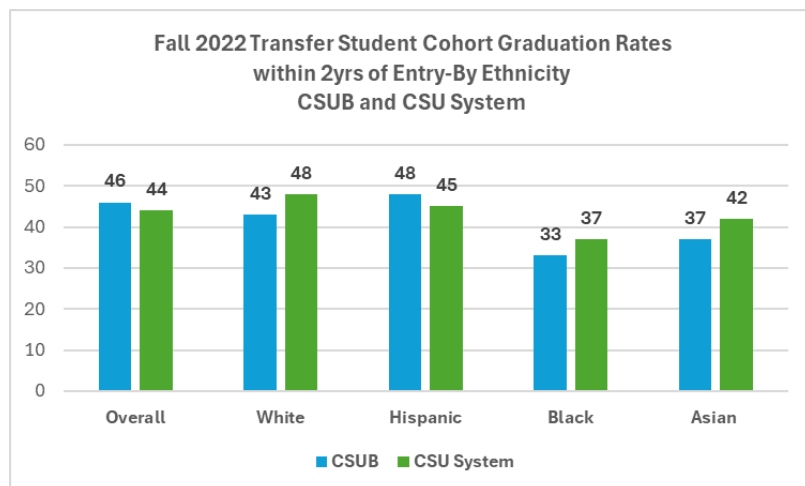


CSUB Graduation rates also vary by **Pell status** where the gap between Pell and Non-Pell students is 7.1% (the 6-year Graduation Rate for students receiving Pell grants is 47.1% while the rate for Non-Pell receiving students is 54.2%). In addition, **First-Generation** status impacts graduation rates with First Generation students graduating at a lower rate than their Non-First Generation peers. According to the CSUB Dashboard, First Generation students graduate at a rate that is currently 10.7% below their Non-First-Generation peers.

**First-Generation Students.** Earlier in this overview, it was noted that CSUB has a high percentage of first-generation colleges students: 42% of undergraduates are from families in which parents have no post-secondary education and over 65% are from families in which the parents have no post-secondary education or do not hold a baccalaureate degree.

Data received from Institutional Research Planning and Assessment office offer a glimpse into the success rates of First-Generation Students in terms of retention and graduation rates. It is important to note that, with few exceptions, the retention rates for first generation, first-time/full-time freshmen has consistently fallen below that of non-first-generation students. This Achievement Gap continues with the 4-year, 5-year, and 6-year graduation rates (source: CSUB IRPA).

**Transfer Graduation Rates.** The graduation rate for CSUB transfer students within 2 years of entry exceed that of the CSU System as a whole. That said, differences exist by ethnicity. Within 4 years of entry, CSUB transfer graduation rates fall below that of the CSU System. The charts that follow represent graduation rate percentages for CSUB and the CSU System.



**Brief Summary.** CSUB data show an incredibly diverse student population with a high percentage of students who might be typically considered ‘at risk’ of succeeding due to some combination of first-generation status, Pell status, as well as Race/Ethnicity status. Significant literature exists on the support needs of all students and, in particular students first in their families to attend college or who may come from culturally or economically diverse backgrounds. That literature speaks to the extent to which these students need support with regard to college navigation, career direction, perhaps academic support, and a relationship with someone who has experience in higher education and cares about them (see resources in Appendix J). Reviewing the extensive data about CSUB students provided by Institutional Research, Planning, and Assessment and the literature on serving Hispanic/Latinx students, first-generation students, and economically challenged students will assist in making data-informed decisions about implementing effective proactive caseload management and academic advising practices.

## APPENDIX C: OUTCOMES FOR ADVISING (BRAINSTORM)

### California State University – Bakersfield Advisor Brainstorm of Student Learning Outcomes

*Expectations for What Students Should Know, Can Do, and Value as a Result of Participating in Academic Advising*

Broad Themes for KNOW:	Broad Themes for VALUE:
<p>Academic Requirements  <i>Academic Advising Outlines</i>  <i>Program/Major Components &amp; Requirements</i>  <i>Graduation Requirements</i>  <i>Policies and Procedures</i>  <i>Prerequisites</i></p> <p>Availability of Resources for Assistance/Support  <i>Available resources to which they can reach out</i>  <i>Know where to find career information</i>  <i>They are valued on this campus (belonging)</i></p> <p>Success Strategies  <i>How to advocate for themselves</i>  <i>Expectations of Course Work</i>  <i>Their rights as students</i>  <i>Classes to Take (Scheduling)</i></p> <p>Role(s) of Advisor  <i>Trusting and Safe Space</i></p> <p>Sense of Belonging  <i>Valued as a CSUB member</i>  <i>Networking opportunities</i></p>	<p>Self (self-confidence and self-efficacy)            Commitment to and potential for success            Autonomy            Responsibility            Planning process</p> <p>Education and Opportunities at CSUB            Importance of education            Value their skills, accomplishments, and degree            Opportunities to grow and be part of clubs &amp; internships            Their educational experience            Internship</p> <p>Effective Communication            Campus Community            Resources Available to Them            Advisors            Faculty            Collaborative relationships            Teamwork</p> <p>Advising Relationship            Advising Support            Partnerships</p>
Broad Themes for CAN DO:	
<p>Understand and Navigate Advising Outlines            Make course selections to match career goals            Plan academic career</p> <p>Navigate CSUB website            Run a transcript/access student portal</p> <p>Take Responsibility and Be Engaged            Be proactive            Find and enroll in classes (independently)            Be accountable for educational progress            Participate in organizations/clubs pertaining to area of study            Socialize</p> <p>Success Strategies            Schedule Advising Appointments            Access technology resources            Ask Questions            Calculate GPA            Come prepared and on time to advising appt            Develop study habits realistic for their goals            Work collaboratively with advisors and faculty</p> <p>Communication Skills            Self-advocacy            Independent decision-making            Contact faculty for mentoring, career advising and networking</p>	

**NOTE:** The list above should be viewed as a rough summary of responses and very preliminary. Having collaborative conversations with advising stakeholders will, in all likelihood, lead to additional and/or more refined student learning outcomes for academic advising. The same holds true for the assessment activity that follows.

*Appendix C, cont'd.*

In addition to brainstorming outcomes for student learning, participants practiced an assessment activity with one or more of the outcomes identified. No attempt was made to refine the phrasing of outcomes. The intention was multifold: to introduce a framework for assessment, to encourage reflection on the opportunities advisors provide for students to learn what they expect them to learn, consider “where else” students might be introduced to the desired outcome, identify “by when” materials should be mastered, and think about measurement and metrics.

**Student Learning Outcomes for Academic Advising  
Advisors – Session 2—Assessment Activity**

During the second session with Advisors, in addition to identifying Outcomes (Cognitive, Skills, Values), the consultants asked advisors to select one of their outcomes and:

- Write the selection as an outcome
- Identify what opportunities they (as advisors) provide students to learn what they expect them to learn
- Identify “where else” students might learn what they expect them to learn
- Identify “by when” they (as advisors) expect students to have “mastered” the outcome
- Identify how they will know that students have learned what they expect them to learn

***The intention of the activity was to introduce advisors to assessment as well as think about academic advising as a teaching and learning function and, themselves as educators.*** Given the allotted time and that it appeared that advisors were not familiar with this type of activity, the expectation was more to *introduce* concepts related to curriculum development and assessment than it was to have folks complete the activity.

As a result of participating in academic advising, students will be able to demonstrate they:

Outcome	Opportunities to Learn	Where Else to Learn	By When “Mastered”	How will you know?
Value Their Degree and Purpose	Throughout academic career		By Graduation	Survey at end of semester
Know their graduation requirements	Throughout their journey			Survey
Find value and purpose in their degree	Teach it			
Value their academic experience			End of the academic year	Produce their plan and get it correct
Value opportunities for internships	Refer students to Handshake and Faculty per Career Interest			Student offered (and participated) in internship
Know their academic requirements (and enroll)	Advising session		By end of first semester	Retention rate at end of 1 <sup>st</sup> semester
Know their degree requirements	Onboarding session Program Outline	FY Seminar	By end of first-year	Fall advising by sophomore year/questionnaire



## APPENDIX D: PLANNING FOR ACTION RESPONSES

### Planning For Action Advisors – Session 1 Only

Advisors were grouped by College and asked to:

- Identify adjective/phrases that would describe the Current State of academic advising at CSUB
- Identify which of the items listed the reflected CSUB students' perspectives
- Identify adjectives/descriptors that would reflect the IDEAL state

The worksheet entitled, "A Simple Brainstorming and Planning Model" is pictured below and included in the Appendices.

#### A Simple Brainstorming and Planning Model

1. Identify adjectives/descriptors that reflect the current state of academic advising (your perspective)
2. Put an X beside the adjectives/descriptors that reflect your STUDENTS' perspectives regarding academic advising.
3. Identify adjectives/descriptors that would reflect the IDEAL state of academic advising (your perspective)
4. In examining the IDEAL state descriptors, which ones should be prioritized? Place an X in the Targeted Actions column

Current State	X for Student Perspective	Ideal State	Targeted Actions (Prioritize)

#### The Activity.

Four Colleges were represented in this session. Antelope Valley was not able to attend Session 1, but was able to participate in Session 2 for Advisors

### Aggregate Advisor Responses to Planning for Action

Current State	X Student Perspective	Ideal State
Team Culture (Supportive personally & professionally)		
Great Leadership at Coordinator Level		
Passion for Student Support/Success	X	
Broken Systems (degree audit tool is inaccurate and a potential detriment—allows students to enroll in courses completed)	X	Systems accurately track student's degree progress
Inconsistencies (Job descriptions; Academic policies and procedures; Transfer evaluations)		Accurate catalog; Accurate transfer evaluations) Pay according to job duties(difficulties in promoting despite additional duties/expertise)
Delay in Essential Tools (Academic catalog, Academic calendar)	X	Catalog published prior to advising new students
Systemic errors/responsibility on advisor to fix (Degree audit; Service Now tickets)		
Late Admissions to University	X	Cut off admissions according to university dates
Late Ready to Advise Lists Cannot include students in targeted campaigns for advising if they are not ready to advise	X	Prepare Ready to Advise Lists & Complete Transfer Evaluations prior to advising period
Degree audit turned off for some students depending on major or quarter to semester students	X	
Consistency across each major (Fresh-Senior year same person)		All students should have a faculty career mentor and professional advisor for academic advising
Accessibility of services is positive		Faculty advising accessibility is unclear
Resourcefulness and knowledge of campus resources is good with professional advisors		Need more professional development
Rapport with students in all majors		
Uncertainty		Communicate updates and changes
Disorganization	X	Create policies/systems that are consistent and reliable
Lack of communication	X	Improve communication transparency
No Leadership		Create clear guidance for advisors and students
Untrustworthy		Create trust and empathy; inclusion
Inconsistent (Policies, services, availability, access)	X	Consistent processes across all student centers
Lack of training (Knowledge)	X	Developing advising training model
Communication (Center and EM)	X	Develop a communication plan across centers
Collaboration Efforts		Creation of committee (Events, dates, communication)
Lack of Support		Expectations outlined; Provide resources

## APPENDIX E: EXPECTATIONS OF ADVISING AND ADVISORS

Students were asked to respond to three questions: 1) What do you expect/want to learn from participating in academic advising?, 2) What are your expectations of your academic advisor? And, 3) What should your advisor expect from you? Themes were identified for the first two questions; a listing of the responses was provided for the third question.

### What do you expect/want to learn from participating in academic advising?

#### **Response Themes**

*Feel welcome/have access to advisors*

*Review academic requirements/classes*

*To learn/get questions answered*

*Career Choices/job opportunities*

#### **Examples of Responses:**

- I expect to be connected with an individual who is well acquainted with the courses in my major as well as other resources, such as Residency Programs or Internships. Through this participation, I want to learn about my program enough to anticipate what options are in the semester. In addition, I expect to learn about the field and what kinds of jobs are available.
- Pathways to your graduation; what classes to take
- Guidance in what you are doing after graduation
- Learn about fields within your major and what to pursue
- Provide check-ins throughout the semester to make sure students are engaged.
- I expect to learn what path I have to take to graduate
- I want to get my questions answered

\*\*\*\*\*

### What are your expectations of your academic advisor?

#### **Response Themes**

*Expertise/welcoming/eager to help*

*Knowledgeable about classes/courses*

*Share career information*

*Knowledgeable about major and info*

#### **Examples of Responses:**

- Openness and willingness to help answer all the questions a student has
- Have availability for students to meet outside of advising week
- To be invited back before registration opens to do "check-ins"
- To provide a safe environment for open dialogue
- Can answer my questions and concerns
- I expect knowledge of the curriculum and courses in my major. The advisor should be welcoming and eager to aid in my academic career and prepare me for job-hunting
- Career connections/questions to help start incoming students rather than having conversation once in the senior year
- Go beyond classes. I want to have conversations about career goals and current experience
- Expectation from advisor/advising is a strong relationship!! Creating and building a relationship and communication with students throughout their academic career. A sense of support and personalized relationship.

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### What should your advisor expect from you?

#### *Responses*

- At least try to come to advising prepared with a future catalog for **your** semesters.
- In general, we (students) should have an idea of what type of classes we need to take and bring a completed advising form.
- My advisor should expect me to be eager about my education and welcome questions about my goals. In addition, I should be expected to look into my own education and anticipate my route to graduation.
- Maintain a conversation in deciding on a schedule.
- Passionate about your schooling and want to graduate on time.
- At least an idea of what you want to achieve at CSUB.
- That I will pass my classes and be determined to finish my degree.
- Connection.
- Looking at the catalog and the classes that relate to a major.
- Have questions.
- Complete my needed classes to move on.
- Graduate on time.
- To do my part in registering and completing courses.
- To speak up when I have concerns/questions.
- Expect the same communication and engagement (as I expect from them).
- They should expect that I will reach out if I know they would respond. I get no communication from them which makes it hard for me to communicate with them.

## APPENDIX F: PROACTIVE CASELOAD MANAGEMENT

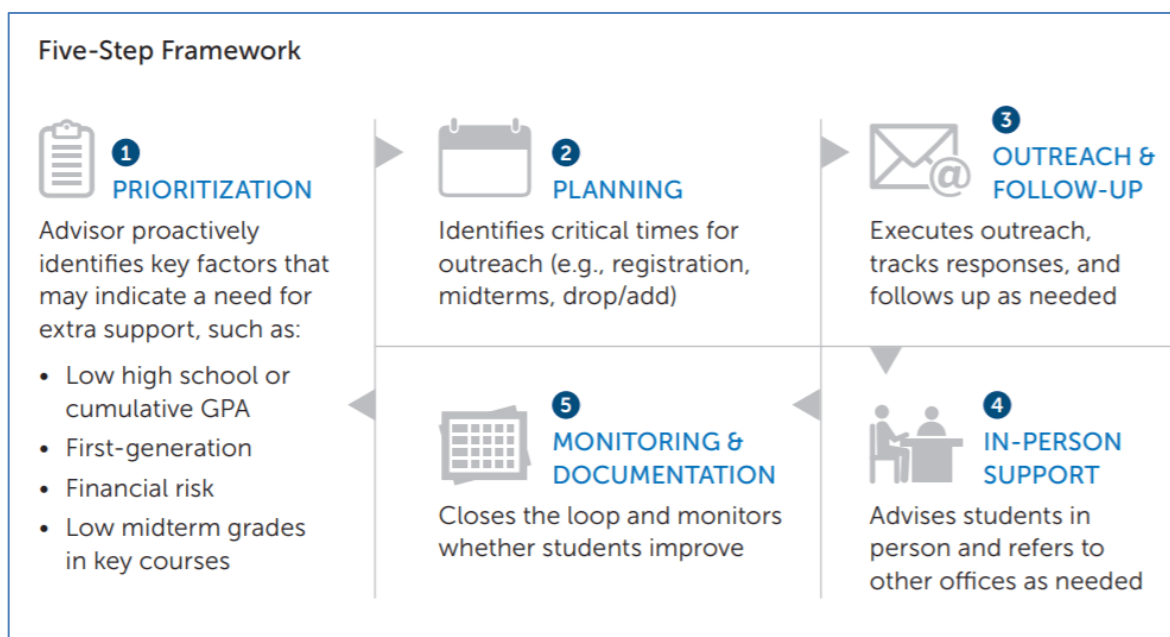
### Proactive Caseload Management

Adapted from EAB.com

Models of advising focused on course registration and transactional services do not consider the fundamentals of effective advising built on supportive advisor and student relationships. As institutions research and rethink what effective advising is, a Proactive Caseload Management approach to advising is recommended. According to EAB, this “model combines three factors:

1. **An assigned student caseload:** The college’s advising structure must allow for reasonably sized assigned caseloads, ideally fewer than 300 students.
2. **A proactive advising approach:** The advisor subscribes to a philosophy of advising that is holistic or developmental in nature, with an emphasis on supporting students’ long-term goals and solving problems before they escalate.
3. **Access to a centralized technology:** Advisors, faculty, and support staff across departments use a shared system, like EAB Navigate,” to view student records, data, and build educational plans (EAB.com).

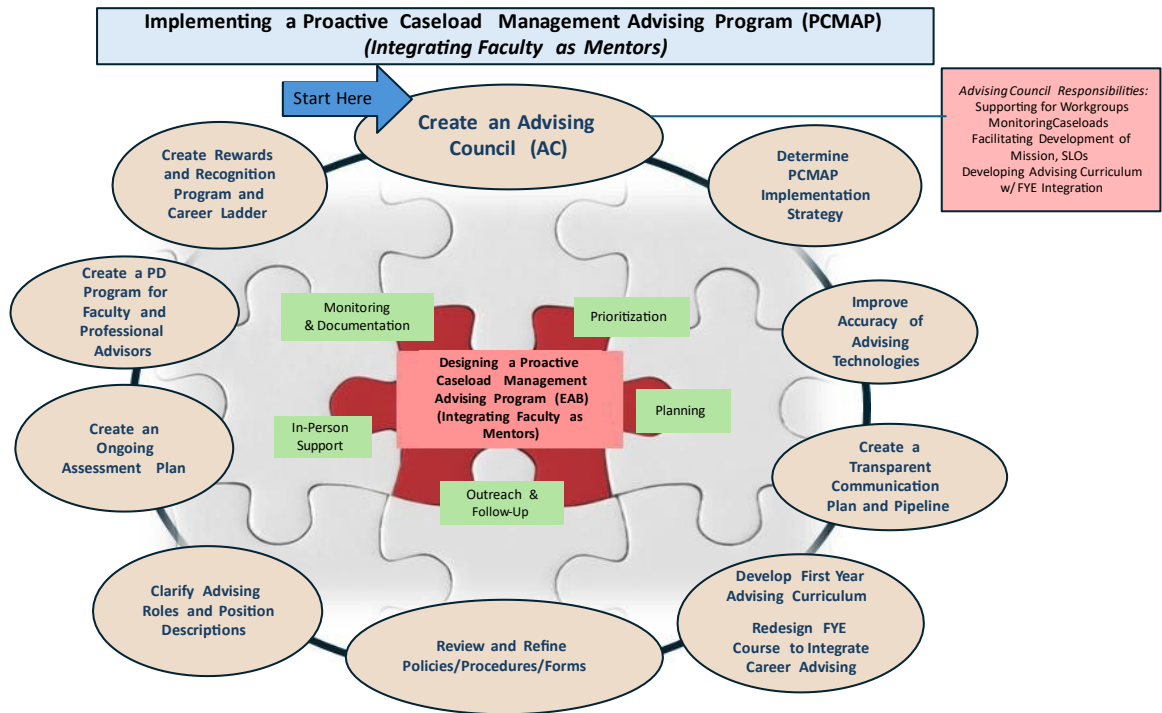
According to EAB.com, the five basic “steps” of Proactive Caseload Management start with prioritization and end with monitoring student progress:



Adapted from EAB.com

Retrieved from <https://eab.com/resources/blog/student-success-blog/proactive-caseload-academic-advising/>

## APPENDIX G: PCMAP CONCEPT MAP



Damminger & Campbell, *Reshaping Advising*  
Adapted from EAB (2019) *Proactive Caseload Management*

## APPENDIX H: TIMELINE FOR SYSTEMIC CHANGE

Efforts to improve academic advising may require systemic change. It is beneficial to include a brief discussion of systemic change as a construct. Jenlink (1998) recommends the following principles for a successful change initiative:

- Creation of an overall image for the ideal system;
- Continuous engagement of knowledgeable and committed stakeholders;
- Recognition that all parts of the system are connected;
- The importance of careful planning for implementation; and
- The need for the system to commit resources for evaluation.

Any type of systemic change takes time and, of course, those involved want to know “how much time.” According to Eccles (1994), “Timely strategic change is not the same as the fastest change but is the ability to implement a change effectively and expeditiously. It requires a talent for combining carefulness with speed.” He argues the most effective change occurs when the organization:

- Employs reflective, information-based, analysis;
- Gathers comprehensive data;
- Debates before deciding;
- Embraces innovation and action;
- Creates a culture that is united and change-oriented; and
- Has an understanding of the twin needs for speed and care (p.261-262).

### Systemic Change Timeline

Systemic change walks the fine line between effectiveness and speed in the change process. The following “Impact and Time to Change Chart” provides a visual representation of the potential change process recommended as a result of the review. The chart serves as a suggestion because the actual time and prioritization of change must match the culture of each individual institution.

## IMPACT AND TIME TO CHANGE CHART

<b>Impact</b>	<b>1-5 Months</b>	<b>6-12 Months</b>	<b>Year 2</b>
<b>High Impact</b>	<ul style="list-style-type: none"> <li>• Create Advising Council and Initiate Workgroups</li> <li>• Create and Implement Proactive Caseload Management Advising Program (PCMAP)</li> <li>• Develop Plan for Advising Council to Monitor PCMAP including Advisor Caseloads</li> <li>• Develop Mission and Draft Outcomes (student learning and process outcomes) for First Year Student Advising</li> <li>• Develop an Advising Curriculum for the First Year</li> <li>• Review and Revise FYE Course to Include Career Advising</li> <li>• Conduct Review of Technology Tools with Ongoing Corrections for Accuracy and Usability</li> </ul>	<ul style="list-style-type: none"> <li>• Draft Remaining Outcomes</li> <li>• Create Assessment Plan for New Model</li> <li>• Develop and Implement Onboarding Plan for New Advisors and Faculty</li> <li>• Develop and Implement Professional Development Program for Advisors and Faculty</li> <li>• Develop a Technology Training Program for all Advisors, Faculty, and Students</li> <li>• Create a Comprehensive Communication Plan</li> <li>• Review and Revise Policies Regarding "Holds"</li> <li>• Review Policies, Procedures, and Forms</li> <li>• Initiate Review of Academic Policies and Procedures Including, but not Limited to Change of Major</li> <li>• Review Physical Space to Assure Welcoming Environment and Confidentiality of Conversation</li> </ul>	<ul style="list-style-type: none"> <li>• Develop Reward and Recognition Program for Advisors of all Types</li> <li>• Explore Development of a Career Ladder for Professional Advisors that Incorporates Performance, Credentials, and Participation in Scholarly Activities</li> </ul>
<b>Medium Impact</b>	<ul style="list-style-type: none"> <li>• Complete Position Description Reviews and Reassignment of Responsibilities</li> </ul>		<ul style="list-style-type: none"> <li>• Review the Components of Orientation to Include Academic Advising</li> <li>• Conduct a Review of Advising for Student-Athletes</li> <li>• Strengthen Collaboration Between Tutoring and Academic Advising</li> </ul>

## APPENDIX I: SELECTED RESOURCES

### **For Advising Administration**

Campbell, S., Stevens Taylor, C., & Dial, M. (Eds.). (2024). *Academic advising administration: Essential knowledge and skills for the 21st Century (2nd ed.)*. Routledge. There are chapters related to most of the Conditions in this edited work.

### **For Advisor Training and Development**

Archambault, K.L. & Hapes, R.L. (Eds.). (2022). *Comprehensive advisor training and development (3<sup>rd</sup> ed.)*. Routledge. Terrific resource for professional development planning.

Drake, J.K., Jordan, P., & Miller, M.A. (Eds.). (2013). *Academic advising approaches: Strategies that teach students to make the most of college*. Jossey-Bass.

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Bermea, G.O.(2024). Advising Latino students at Hispanic-Serving Institutions: A strategy rooted in servingness and intentionality. *Academic Advising Today*, 47:4.  
<https://nacada.ksu.edu/Resources/Academic-Advising-Today/View-Articles.aspx>

Salusky, I., Monjaras-Gaytan, L., Ulerio, G., Forbes, N., Perron, G., & Raposa, E. (2022). The Formation and Role of Social Belonging in On-Campus Integration of Diverse First-Generation College Students. *Journal of College Student Retention*, 26(2), 473-499. <https://doi.org/10.1177/15210251221092709> (Original work published 2024)

### **Research**

The NACADA Research Center has been conducting studies on the impact of advising on students. The Center has also developed outcomes surveys that (as mentioned in the narrative) might be considered by the College of Education. URL: <https://nacada.ksu.edu/>

The NSSE site has a number of reports and research studies related to student engagement and advising for consideration. The address to NSSE Research Reports is: <https://nsse.indiana.edu/research/publications-presentations/index.html>

Love, A.G. (Winter 2012). The growth and current state of learning communities in higher education. In *New Directions for Teaching and Learning*, No. 132. Pp 5-19. Wiley.

### **Related to Conditions**

*Note: Several of these resources relate to more than one Condition; most will be evident from the title of the resource.*

### **Commitment & Improvement and the Scholarship of Advising**

Larson, J., Johnson, A., Aiken-Wisniewski, S. A., and Barkemeyer, J. (2018). *What is Academic Advising? An application of analytic induction*. Retrieved from: <https://files.eric.ed.gov/fulltext/EJ1202423.pdf>.



McGill, C. M. (2019). The professionalization of academic advising: A structured literature review. Retrieved from: <https://meridian.allenpress.com/nacada-journal/article/39/1/89/430129/The-Professionalization-of-Academic-Advising-A>.

Campbell, S. M. (2008). Vision, mission, goals, and programmatic objectives for academic advising programs. In Gordon, V.N., Habley, W.R. & Grites, T.J. (Eds). *Academic advising: A comprehensive handbook* (2nd edition) (pp. 229-243). Jossey-Bass.

Henning, G.W. & Roberts, D. (2016). *Student affairs assessment: Theory to practice*. Stylus.

Suskie, L. (2018). *Assessing student learning: A common sense guide* (3<sup>rd</sup> ed.). Stylus.

Academic advising mission statements:

<http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Academic-advising-mission-statements.aspx>

Sample advising mission statements:

<http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Examples-of-academic-advising-mission-statements.aspx>

NACADA Core Values for Academic Advising;

<https://nacada.ksu.edu/Resources/Pillars.aspx>

## **Learning**

Barkley, E.F. & Major, C.H. (2022). *Engaged teaching: A handbook for college faculty* (1<sup>st</sup> ed.). SocialGood/K. Patricia Cross Academy.

Hurt, R. (2007). *Advising as teaching: Establishing outcomes, developing tools, and assessing student learning*. Retrieved from <https://meridian.allenpress.com/nacada-journal/article/27/2/36/36214/Advising-as-Teaching-Establishing-Outcomes>

Kraft-Terry, S. and Kau, C. (2019). Direct measure assessment of learning outcome–driven proactive advising for academically at-risk students. *NACADA Journal* 39(1), p. 60-76. <https://nacadajournal.org/doi.org/10.12930/NACADA-18-005>

Kansas State University. <https://www.k-state.edu/student-success/about/advising/advising-handbook/student-learning-outcomes.html>

Martin, H. (2007). *Constructing learning objectives for academic advising*. Retrieved from <https://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Constructing-student-learning-outcomes.aspx>

Nutt, C. (2004). *Assessing student learning in advising*. Retrieved from <https://www.nacada.ksu.edu/Portals/0/ePub/documents/27-4%20Dec%202004.pdf> (pp. 5 & 7)

Robbins, R. and Zarges, K. M. (2011). *Assessment of academic advising*. Retrieved from <https://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/Assessment-of-academic-advising.aspx>

University of North Georgia. <https://ung.edu/academic-advising/learning-outcomes.php>

### **Organization**

EAB (2019). *What is Proactive Caseload Management and what does it mean for students?* Retrieved from <https://eab.com/resources/blog/student-success-blog/proactive-caseload-academic-advising/>

Rust, M.M. and Willey, A.E. (2024) Defining and institutionalizing proactive advising: Insights from a national survey. *NACADA Journal* 44(2), p 83-109.

### **Advisor Selection and Development**

Folsom, P., Yoder, F., and Joslin, J. E. (2015). *New advisor guidebook: Mastering the art of academic advising*. Wiley.

EAB (2009). *Meeting student demand for high-touch advising*. Retrieved from [https://attachment.eab.com/wp-content/uploads/2009/01/18881\\_ULC\\_High-Touch-Advising.pdf](https://attachment.eab.com/wp-content/uploads/2009/01/18881_ULC_High-Touch-Advising.pdf)

Nutt, C. (2016). *Excellence in advising through iPASS: Faculty, professional staff, hybrid*. Retrieved from <https://youtu.be/4ooEtkNODU?list=PL4EzW5CoLLhrgW6TCIDfopoPnCFvWS9K7>

Institutional Examples:

University of Tennessee Knoxville: <https://studentsuccess.utk.edu/advising/career-path/>

Old Dominion University: <https://www.odu.edu/facultystaff/advising/resources/master-advisor>

*NACADA Core Competencies*.

<https://nacada.ksu.edu/Resources/Pillars/CoreCompetencies.aspx>

Wallace, S., & Wallace, B. (2010). Training faculty advisors. In *Comprehensive advisor training and development: Practices that deliver (Monograph No. 21)* (pp. 53-59). National Academic Advising Association.

Yoder, F. & Joslin, J. (2015). Advisor growth and development: Building a foundation for mastery. In P. Folsom, F. Yoder, and J. Joslin (Eds.) *The new advisor guidebook: Mastering the art of academic advising*. Jossey-Bass.

Yoder, F. (2015) Voices from the field: Sample calendar for a year-long self-development program. In P. Folsom, F. Yoder, and J. Joslin (Eds.) *The new advisor guidebook: Mastering the art of academic advising*. Jossey-Bass.

*NACADA Pocket Guide, A Faculty Guide to Academic Advising, 2nd edition*.

Givans Voller, J. (2016). Professional Development. In T.J. Grites, M.A. Miller, and J. Givans Voller (Eds.) *Beyond foundations: Developing as a master academic advisor* (pp. 251-269). Wiley.

### **Collaboration and Communication**

Campbell, S., Stevens Taylor, C., & Dial, M. (Eds.). (2024). *Academic advising administration: Essential knowledge and skills for the 21st Century (2nd ed.)*. Routledge.

Institutional Example:

Wayne State University - <https://advisortraining.wayne.edu/aac>

### **Technology**

Academic Advising in Canvas. [https://www.youtube.com/watch?v=19I9gYDo8\\_k](https://www.youtube.com/watch?v=19I9gYDo8_k)

Advising and Outreach with Canvas. <https://www.youtube.com/watch?v=8Tht79tWyl8>

Student Engagement and Community-Building Through Online Academic Advising.

[https://www.youtube.com/watch?v=LL7\\_m\\_5VETs](https://www.youtube.com/watch?v=LL7_m_5VETs)

Emory. <https://canvas.emory.edu/courses/60367/pages/reference-pages-%7C-advising-and-registration-building-your-schedule>

## APPENDIX J: CONDITIONS OF EXCELLENCE IN ACADEMIC ADVISING

### **Institutional Commitment**

Institutions recognize that academic advising is a shared responsibility integral to the students' educational experience and the institution's teaching and learning mission. This commitment begins with an institutional academic advising mission statement that is informed by the values and beliefs of the institution. Both widely understood and articulated in institutional documents, this statement informs practice as well as the administration, organization, delivery, and assessment of academic advising.

### **Learning**

Institutions assure that academic advisors are knowledgeable about the institution's expected learning outcomes, curriculum, pedagogy, and the student learning process. Excellent advising programs also establish curriculum, pedagogy, and student learning and developmental outcomes for academic advising throughout a student's educational experience. Academic advising outcomes are aligned with the institution's curriculum, academic advising mission, and goals. These outcomes are systematically assessed and refinements are made based upon documented assessment results.

### **Equity, Inclusion, and Diversity**

Excellent academic advising demonstrates a commitment to the values and culture of inclusivity and social justice. It encourages individual and institutional conversations that promote understanding, respect, and honor diverse perspectives, ideas, and identities. Academic advising policies and practices reflect a commitment to equity, inclusion, and diversity.

### **Advisor Selection and Development**

Institutions employ effective selection practices, professional development, and appropriate recognition and rewards for all advisors and advising administrators. Institutions and/or units establish clear expectations and requirements for advisors as well as systems for formative and summative feedback to advisors. Establishing position/role requirements for primary role advisors and processes for selecting, hiring, salary scales, and retaining quality academic advisors provide consistency for students and supports program sustainability. Ongoing professional development programs ensure that those in the academic advising community are current in advising skills and knowledge and that advising practice reflects the core values and competencies for excellent academic advising.

### **Improvement and the Scholarship of Advising**

Institutions committed to systematic assessment and evaluation recognize the complexity of the educational process and its theoretical underpinnings. They operate under the principles of ongoing, evidence-based plans for assessment of both advisors and advising programs. Members of the academic advising community are both critical consumers of, and contributors to, scholarly literature, including the effects that advising can have on students and the role of advising in higher education.

### **Collaboration and Communication**

Effective academic advising requires coordination and collaborative partnerships among all units across campus. These partnerships foster ongoing communication and promote resource sharing. A collaboratively developed strategic communication plan, inclusive of all institutional stakeholders, involves frequent and intentional exchanges of information and ideas, is routinely reviewed and updated, and advances a shared aspirational vision for academic advising across all units.

### **Organization**

Excellent advising programs are intentionally organized across the institution to meet the institutional academic mission, goals, and intended outcomes. The organization of academic advising must have structured leadership, appropriate resources, and a systematic approach to continuous assessment and improvement. The organizational structure supports the roles of all academic advisors, regardless of title.

### **Student Purpose and Pathways**

Effective academic advising directs students to explore and define their own purpose, goals, and curricular pathways to achieve learning and developmental outcomes. Curricular plans must be coherent, enrich students' programs of study, and support their educational goals, career and life aspirations. Partners and key stakeholders collaboratively and closely examine all student transitions and develop policies and practices to overcome barriers and optimize learning and success.

### **Technology Enabled Advising**

Excellent academic advising incorporates appropriate technology to complement, support, and enhance advising practice. This requires institutions to include academic advisors in the selection, delivery, and assessment of advising technologies. Institutions must provide on-going training in the use and potential applicability of dynamic tools to strengthen advising practice and culture.

*The Conditions of Excellence in Academic Advising are aspirational standards to guide evidence-based improvement of academic advising. The Conditions were jointly created by NACADA: The Global Community for Academic Advising and the John N. Gardner Institute for Excellence in Undergraduate Education and may be used in non-commercial ways by third parties under a Creative Commons Attribution and No Derivatives license.*