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Designing And Developing A Training Program For Advisors And Program Coordinators: Applying Coaching Strategies In Academic Advising

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Submitted to the Program of Organizational Dynamics, College of Liberal and Professional Studies in the School of Arts and Sciences in Partial Fulfillment of the Requirements for the Degree of Master of Science in Organizational Dynamics at the University of Pennsylvania
Advisor: Charline S. Russo, EdD

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Designing And Developing A Training Program For Advisors And Program Coordinators: Applying Coaching Strategies In Academic Advising

Abstract

This capstone study explores the need for formal training specifically designed for academic advisors in one school in a higher education institution. The study includes a review of the literature in adult learning, coaching in academia, the role of the academic advisor and select advisor training in universities. Based on the review of the literature, an interview guide was created and interviews with current academic advisors and their managers were conducted. Interviewees provided insights that informed the content and structure of this program. The findings supported a need for advisor training that was greater than originally contemplated. Based on the study results, a Staff Advisor Training Program was designed to meet the identified needs. The Staff Advisor Training Program offers advisors training in academic coaching through a progression of three types of advising—prescriptive, developmental, and proactive—and creates a safe space for real-time advising practice. The training provides basic to advance fundamental knowledge that advisors need to grow professionally and be informed about the numerous topics students seek assistance from the staff advisor during their academic program.

Keywords

training, advising, academic advising, coaching, higher education

Comments

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Advisor: Charline S. Russo, EdD

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PROGRAM COORDINATORS: APPLYING COACHING STRATEGIES IN
ACADEMIC ADVISING

by

Maryeileen B. Griffith

Submitted to the Program of Organizational Dynamics,
College of Liberal and Professional Studies
in the School of Arts and Sciences
in Partial Fulfillment of the Requirements for the Degree of
Master of Science in Organizational Dynamics at the
University of Pennsylvania

Philadelphia, Pennsylvania

2021

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PROGRAM COORDINATORS: APPLYING COACHING STRATEGIES IN
ACADEMIC ADVISING

Approved by:

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ABSTRACT

This capstone study explores the need for formal training specifically designed for academic advisors in one school in a higher education institution. The study includes a review of the literature in adult learning, coaching in academia, the role of the academic advisor and select advisor training in universities. Based on the review of the literature, an interview guide was created and interviews with current academic advisors and their managers were conducted. Interviewees provided insights that informed the content and structure of this program. The findings supported a need for advisor training that was greater than originally contemplated. Based on the study results, a Staff Advisor Training Program was designed to meet the identified needs. The Staff Advisor Training Program offers advisors training in academic coaching through a progression of three types of advising—prescriptive, developmental, and proactive—and creates a safe space for real-time advising practice. The training provides basic to advance fundamental knowledge that advisors need to grow professionally and be informed about the numerous topics students seek assistance from the staff advisor during their academic program.

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CHAPTER 1

INTRODUCTION

Personal Background

Advising students is the favorite aspect of my job, which is coordinating graduate programs at an Ivy League university. Yet, of all my responsibilities, I have received the least amount of training on advising. At one time I volunteered to be a Conduct Office advisor as an opportunity to learn new skills to apply in becoming a better advisor. The Conduct Office is responsible for acting on behalf of the University when a student is suspected of a discipline violation. Although the position is classified as an advisor role, the training I received emphasized this role was more about providing support for the student, rather than serving as an expert on the rules. After completing the training, I reflected on ways I could use the coaching practices I had recently learned in the Organizational Dynamics course named “Consulting/Coaching Tools and Techniques” in my new role.

Initially, applying these newly learned coaching techniques made me feel as if I was taking shortcuts by only asking questions and not telling the student what to do next. Shortly after the conclusion of one case, a senior colleague thanked me for assisting his student in the Conduct Office case. My colleague had received a call from the student’s parents because they were grateful that someone was there for their child when they could not be there. The student had told his parents that it was the first time he had felt someone really listened to him and supported him at college. Receiving praise helped me

recognize that applying fundamental coaching tools, actively listening, and asking thoughtful questions would be beneficial in my other advising roles.

Applying what I learned in this coaching class has so positively impacted my professional life that I am now preparing to design and develop a workshop for academic advisors—also known as program coordinators—to be used as a tool in onboarding or continuing education for academic advisors. This case study is about my experience within one of the schools of the university.

When an advisor is onboarded in another department within the school, I often serve as a resource to the office manager to help train them on advising. New hires are often overwhelmed when they are told about the level of advising we are expected to perform in addition to other duties.

Academic advisors play an important role in assisting students to obtain the desired outcomes from their educational experience....Advisors are more than mere transmitters of administrative information. Rather, they are key contributors to the development of others; educational and leadership outcomes included. (McConnell, 2018, p. 154)

I believe such a workshop for advisors can provide guidance, establish clear goals and expectations, save time, help transfer institutional knowledge, and better serve students' ever-changing needs.

I have applied many techniques and strategies learned through several coaching courses and have directly experienced their effectiveness. As an advisor with 20 years of experience, I am comfortable testing new approaches within my work. I am also fortunate to work in an environment supportive of these changes in techniques. My experiences enable me to manage my time well. I am able to spend less time maintaining routine duties, which permits me time for perfecting my craft. Advising is only one facet of my

profession. As noted by McConnell (2018): “Graduate-level academic advisors play an important role in setting the conditions for effective student learning....The advisor role may include leader development features setting the conditions for lifelong learning affecting student leadership, scholarship, and practice” (p. 146). Many new hires have confided in me about their concerns of not having time for deeper student engagements as they struggle to manage competing priorities and multiple supervisors. Graduate coordinators are classified as student support positions, and most of them work under the auspice of an appointed faculty director.

Faculty who are responsible for graduate programs in the school are appointed for 3-year terms as a graduate group chair. Each new graduate group chair has a vision and goals for their term of service. When they assume the role, they usually do not have a clear understanding of the role or the level of support they will receive from their graduate coordinator, who helps them achieve their goals. Expectations of the graduate coordinator vary, even between departments in the same school. New staff seem to be unsure about their roles and how much autonomy they have in their positions before they need to request faculty approval. Obtaining faculty approval from a graduate group chair who may have none to 3 years of experience can prove challenging as they may not be clear themselves on what they are empowered to approve. In the absence of formal training, the needs of students may become a lower priority when a task is assigned by a faculty member.

A training workshop for academic advisors could offer clarity, not only for the new hire but also for the faculty supervisor. The workshop can provide an overview of the role and illustrate best practices, methods, and techniques that could be adopted based

on the individual department's needs. Materials from the workshop can allow for autonomous exploration that can be digested on a personal level after the training session. This capstone focuses on academic advisors in one school at an Ivy League university in determining their training needs.

Overview of the Capstone Study and Goals

The four main goals of this capstone were as follows:

1. To determine the need for formal training specifically designed for academic advisors
2. To review the literature on academic advising, adult learning, and program development, including my personal experiences as an academic advisor
3. To design an interview guide, based on the literature and my experiences, and conduct interviews of advisors and their supervisors to learn about the training needs of academic advisors and their supervisors regarding their advising staff
4. To design a workshop for academic advisors that addresses the needs identified during the interviews, supported by the literature and my personal experiences

Long-term goals of the training workshop include providing clarity and guidance to all stakeholders regarding the role of the academic advisor. Since the role is not clearly defined, academic advising is often given lower priority. According to McConnell (2018), "How those advisors perform their jobs may make the difference between successful and challenged student experiences" (p. 147). One objective of implementing the workshop is to help students benefit from having advisors who are trained in all aspects of their roles. The interviews uncover the elements in which training is required.

With this training, advisors can have a better foundation to aid students in navigating higher education, which could lead to increased retention and satisfaction of students. Of all the benefits of advisor training, students stand to gain the most as the recipient of additional advising services and support. Finally, participating in the training program has the potential for building a formal network of advising professionals who can support each other and continue to share their learning and expertise.

Structure of the Capstone

The capstone begins with an introduction to the study, which includes describing the problem situation and how—based on my experience as an academic advisor as well as the learning from my graduate program in Organizational Dynamics—I developed a concept for training academic advisors. The program was designed using coaching as a core advising skill and an approach to academic advising.

Chapter 2 is a review of the literature related to academic advising and training, coaching, adult learning, and program development, including conducting needs assessments and coaching in academic settings.

Chapter 3 presents the methodology used to design and develop the training programs, which includes the needs assessment process in program development. This process included interviews with 18 departmental academic advisors, two school level advisors, and five supervisors from the same school. The advisor interviews focused on their individual training experience and advising process to help identify their training and learning needs. The purpose of the supervisor interviews was to learn about their current training practices, determine their potential commitment to a training program, and identify the opportunities and challenges in conducting the training. Direct quotations

from these interviews are included along with summaries of the key points as they relate to this study.

Chapter 4 provides an analysis of the data collected during the needs assessment process as well as applying the data to the literature and my extensive experience as an academic advisor as a guidepost.

Chapter 5 focuses on training program development, including how I used the data analysis, the literature, and my personal experiences as an academic advisor to create a training program. The program addresses three levels of learning and the skill development needs of the academic advisors in the school. It also includes the proposed plan for the launch of the training, including target audiences and training content.

Chapter 6 provides a summary and conclusions, including my learning during this process and some potential implications for further research.

CHAPTER 2

LITERATURE REVIEW

The following review of literature provides a foundation for the research and application of program design, development, and delivery described in subsequent chapters. This review includes the literature related to academic advising and training, coaching, adult learning, and program development, including needs assessments and coaching in academic settings.

Coaching-Based Advising in Academia

Minimal literature exists about coaching-based advising in academia. Given a scarcity of literature on this topic, the researchers included complementary areas in their reviews. My search resulted in identifying articles that referred to the coaching of medical students, formal undergraduate coaching based mentoring programs, or faculty mentoring. My review of the research focuses on the advisor as the first person a student has contact with at the university. However, students often identify sources of advising by asking peers, faculty, and other staff members, as well as university resources outside of the department such as clubs or interest groups. To further complicate the situation, within schools the advisor and student relationship has changed from advising as the sole responsibility of the faculty advisor to a partnership between the faculty and staff advisor. As standard practice, faculty often refer the student to a staff member for confirmation, clarification, or more information. The lack of clarity and alignment concerning who advises students and when they are advised contribute to the need for role clarity and training for the academic advisors, which was the impetus for this study.

This review of literature focuses on research that can inform my goal of improving the staff advisor and student relationship through advisor specific training. Before investigating how to improve the student-staff advisor relationship, one must first examine the current ways students are advised by staff. The job titles of staff who advise students can vary, including “graduate program coordinators,” “program directors,” and “academic advisor”—just to name a few job titles. For the purposes of this capstone, any staff person who performs academic advising on some level is referred to as a “staff advisor,” which is not to be confused with the role of a faculty advisor.

Types of Advising

The advisor plays an important role in assisting students on their journey toward degree completion. As noted by Darling (2015):

Academic advisers’ roles and responsibilities have become increasingly complex...university leaders are realizing how central quality academic advising programs are to student success, and the pressure is on for advisers to show how their work can impact higher retention and graduation rates and students’ future careers and employment. (p. 91)

Bland (2003) discusses two types of advising concepts: prescriptive and developmental. Prescriptive advising is assisting students in a single event with course selection and academic regulations. The advisor has all the authority in prescriptive advising. Developmental advising is described as a progression of “shared responsibility” between the advisor and the student (Bland, 2003, p. 7). Developmental advising empowers students to set goals tailored to their individual values.

When I began my role as an advisor, I was taught to be a prescriptive advisor. Prescriptive advising has its place in academia and is necessary because the courses selected for degree completion are guided by the academic regulations. It also

accommodates a large advising load. Not all students want to form a bond with their academic advisor; they have clear goals for their academic program and directly request a prescriptive advising interaction. Furthermore, many students rely on advising for support in areas *besides* rules and regulations. My graduate studies have introduced me to coaching tools, including active listening and asking questions that helped me offer my advisees developmental advising when appropriate. As noted by Schein (2009):

At the core of this role is the assumption that clients must be encouraged to remain proactive, in the sense of retaining both the diagnostic and remedial initiative because only they own the problems identified, only they know the true complexity of their situation, and only they know what will work for them in the culture in which they live. (p. 62)

Prescriptive advising typically takes place early in the relationship between the advisor and student. As they establish their relationship, they have an opportunity to use developmental advising. Clearly, prescriptive advising has its place throughout the student's academic career in making sure requirements are met. Prescriptive advising can be as simple as the student asking about an academic calendar deadline or a form. Prescriptive advising can be efficient and allows the advisor to help many students in a short time span. In prescriptive advising, the advisor is sought by the student. Prescriptive advising can involve helping students understand the degree requirements. As noted by Bland (2003), "Prescriptive academic advising merely addresses course selection and academic regulations. It is a one-way street—the advisor holds the control and the power. Prescriptive advising is an event that limits the student to the advisor's choices" (p. 7). Due to the large number of advisees and limited resources and training, most advising is prescriptive.

Advisors who practice purely prescriptive advising focus on degree requirements and university policies and procedures. The opportunity to understand the challenges the student may be faced with in meeting those requirements may not be available. For example, when a student requests a withdrawal from a degree program, a prescriptive advisor would provide the administrative policy on withdrawals, whereas a developmental advisor may ask what led the student to this decision. Through this thoughtful inquiry (namely, by asking questions and listening) the advisor can learn about an issue that could be corrected and provide the opportunity for the student to complete the program. Developmental advising creates an opportunity to advance the advising relationship and have more meaningful interactions. It helps address problems rather than focus on limited solutions found in policies and procedures.

Crookston (2009)—a former professor of education at the University of Connecticut—analyzed the dimensions of prescriptive and developmental approaches to advising, articulating definitions of prescriptive and developmental advising that agree with Bland’s use of these terms. Crookston takes an additional step to compare the relationship of the advisor and student in prescriptive and developmental advising in the areas of abilities, motivation, rewards, maturity, and initiative (see Table 1). Crookston’s approach depicts developmental advising as an advance in the advising relationship from prescriptive to a shared responsibility through developmental advising. According to Crookston (2009), “Regardless of the relationship to be defined, the goal is toward openness, acceptance, trust, sharing of data, and collaborative problem-solving, decision-making, and evaluation” (p. 81). Developmental advisors help students move toward

autonomy in their educational journey through trust and belief in each student's abilities to reach their goals.

Table 1. Crookston's Contrasting Dimensions of Prescriptive and Developmental Approaches to Advising (Crookston, 2009, p.80)

<i>In terms of</i>	<i>Prescriptive</i>	<i>Developmental</i>
Abilities	Focus on limitations	Focus on potentialities
Motivation	Students are lazy, need prodding*	Students are active, striving*
Rewards	Grades, credit, income	Achievement, mastery, acceptance, status, recognition, fulfillment
Maturity	Immature, irresponsible; must be closely supervised and carefully checked*	Growing, maturing, responsible, capable of self-direction*
Initiative	Advisor takes initiative on fulfilling requirements; rest up to student	Either or both may take initiative
Control	By advisor	Negotiated
Responsibility	By advisor to advise By student to act	Negotiated
Learning output	Primarily in student	Shared
Evaluation	By advisor to student	Collaborative
Relationship	Based on status, strategies, games, low trust	Based on nature of task, competencies, situation, high high trust

*After McGregor's (1960) x and y theories.

In my experience, students rarely ask an advisor during a first meeting for a deep conversation that could affect the life outcomes of the student. The lack of role clarity and clearly defined processes contributes to the students not knowing they can ask for more than a prescriptive advising experience. In developmental advising, the student can ask for advice so that the academic advisor has an opportunity to use coaching tools such as active listening, unconditional positive regard, and thoughtful questions to help the student make their own decisions. As noted by Bland (2003), "The advisor empowers the

student to explore all options and participate fully in the decision-making process....Developmental advising facilitates and guides, thus strengthening the advisor/student relationship and empowering the student for personal, academic, and career success” (p. 7).

As an academic advisor, I use both prescriptive and developmental advising. An advisor needs to know the policies, procedures, and university requirements to help students complete their degrees. Knowing how to listen and how to ask questions is useful in developmental advising and can be combined with prescriptive advising. An advisor who knows how to use both types of advising concepts can also determine when which method is most appropriate. He and Hutson (2016) discuss a shared advisor model in which both faculty and professional advisors work with students in an advisor capacity.

He and Hutson (2016) noted the shared advising model is probably the most common structure used; it is the one I use in my advising. In the shared advising model, students interact with both faculty and staff advisors to support their learning goals. He and Hutson (2016) also noted prescriptive advising is one of the most common approaches to student advising, highlighting that this approach is not focused on the students.

These authors describe another type of advising as intrusive or proactive. Proactive advisors do not wait for the student to reach out when they have a question or concern. According to He and Hutson (2016), this advising approach

allows advisors to intervene and prevent academic challenges by offering support to targeted student groups, especially those that are perceived as at-risk. The critical responsibility for advisors using this approach is to identify the support students may need to prevent potential problems. (p. 215)

In Chapter 4 I offer a personal reflection on my first major proactive advising initiative and how I found out this type of advising has a place in academia. I learned proactive advising can be extremely time-consuming, although rewarding, for the students interact with and for me. Students responded to my proactive advising initiative with gratitude for taking the time to reach out and check in with them. During proactive advising opportunities the goal is not how to use time; the goal is effective academic advising, helping position students for success.

The next section explores how staff advising is performed in other institutions to better understand a broader view of the role of the staff advisor.

Role of the Staff Advisor

Staff advisors have many titles in academic institutions. Advisory staff in the U.S. Army's Command and General Staff College (CGSC) are called staff group advisors (SGAs). A recent study of SGAs was conducted to understand from the military student's perspective how the role of the SGA is characterized (McConnell, 2018). CGSC acknowledges the direct role the SGA plays in assisting students toward degree completion. What seems to be unique to the SGA's role at CGSC is that SGAs combine academic advising with leader development. CGSC includes leadership development in addition to traditional academic studies to prepare graduates to navigate the complex challenges military officers encounter in their assignments.

Of special note is the literature on academic advising, specifically Demetriou's (2011) applied attribution theory. This theory explains how a student's individual conception of control directly impacts the student's efforts. The author acknowledges the advisor's role is not solely administrative, which is comparable to nonmilitary institutions

of higher education. Staff advisors may also be responsible for duties such as managing the course roster, organizing seminar series, recruiting, course support hiring, and managing class waitlists—to name a few responsibilities. These additional responsibilities are similar in resource demands to the advisor role in nonmilitary institutions. As noted by McConnell (2018),

Graduate-level academic advisors play an important role in setting the conditions for effective student learning. ...The advisor role may include leader development features setting the conditions for lifelong learning affecting student leadership, scholarship, and practice. ... How those advisors perform their jobs may make the difference between successful and challenged student experiences. (pp. 146-147)

McConnell (2018) collected data from the students on their expected characteristics of SGAs, noting that effective SGAs are expected to be “...knowledgeable, personable, empathetic, and balanced,” (and have traits of “openness, extroversion, conscientiousness, and empathy,” (while being) “inviting and very welcoming.” Furthermore, it “takes time to get to know us,...asks us how we are doing, (and) asks about our families, knowing the names of our spouses and kids” (p. 152). The expectations are similar to the characteristics of developmental advising.

Besides the many duties academic advisors are tasked with, the research demonstrates that the student’s expectations of staff advisory performance, in addition to advising, can be substantial. This study assessed the student’s expectation of their advisor; however, assessments on the quality of services offered were not included.

A study at the University of Missouri sought to assess advisor quality by students who were asked to assess both faculty and professional advisors, rating them on their knowledge, availability, and autonomy supportiveness using Deci and Ryan’s self-determination theory, which is a framework for the study of human motivation and

personality. The authors reviewed the results of the Missouri Advisor Quality Survey and found the advisors have power and influence that affect the students. The study demonstrated “advisor autonomy support was the strongest predictor of global advisor satisfaction. Advisor autonomy support also was the strongest predictor of student performance” (Sheldon et al., 2015, p. 271). While the study did not define “global,” the terms may refer to overall satisfaction, advising assessed holistically.

The research also showed substantial differences in advisor quality throughout the university, colleges, and school. Students valued their interactions with faculty advisors over staff advisors, noting this difference could be due to staff advisors having a larger advising load. This finding is significant because students tend to call on staff advisors if they are not getting answers from their faculty advisors or when their faculty advisors refers the student to the staff advisor. This difference could also be due to the other duties a staff advisor is required to perform, which could result in diluting the advising experience. As noted in this study, substantial differences in the quality scores varied throughout the university with no mention of the training the staff advisors received and if the training was for all university advisors, which could have implications for the training considered as a result of this study.

Select Advisor Training at Other Universities

The Ohio State University has offered a formal two-credit course on how to be an academic advisor for over 15 years. The course includes a review of the history of advising, advising theory, and skills and delivery systems, as well as a literature review on advising (Gordon, 2019). Advising training “can foster positive attitudes and enthusiasm for advising as a process and as a professional activity. It exposes the myths

and mysteries of advising, thus allowing future advisors to build the confidence they need for future responsibilities” (Gordon, 2019, p. 60).

A potential barrier to staff enrolling in formal coursework may be that it is not considered on-the-job training. Some universities require individuals to matriculate in a degree program to be eligible to register for classes. For some staff members such as myself, the outcomes of enrolling in a degree program may be considered worthwhile, thus overcoming these hurdles. Colleagues have shared several reasons for not enrolling in a degree program, including their lack of financial means, fear of not being accepted into the program, or limited time outside of work to participate in such programs. Also, many of these courses are offered at times convenient only to full-time students. Time constraints, personal obligations, and/or job duties may limit an employee’s ability to commit to taking 3 hours a week to attend the course.

As noted by Gordon (2019),

The advising profession needs to encourage academic departments in higher education, student personnel, and related areas to offer graduate-level courses in advising at their institutions.... We would also prepare more student personnel and counseling professionals for entry level positions as advisors. When taught at the graduate level, advising becomes a legitimate and important part of higher education. (p. 62)

Gordon recognizes that a formal course on advising helps make advising a legitimate role and clearly displays its importance. A formal training workshop on advising can also make advising authentic, standardize fundamental skills, and provide clear guidance and expectations of quality.

One study by Wenham and colleagues (2020) at Griffith University in Logan, Australia, set out to identify areas in which advisors needed support outside of the formal classroom setting. These researchers examined the tasks that were involved in being an

academic advisor in a Work-Integrated Learning (WIL) program. The researchers set out to understand what types of support the advisors needed to effectively perform their job and identify areas in which additional training or support would help academic advisors. WIL programs are designed to bridge the gap—which refers to the space between the learning and work environments—between education and the work force after graduation. Of special note is that the WIL’s program advisors were usually seasonal employees enrolled in a PhD degree program.

The advisors interviewed for this capstone study are full-time employees. Using interviews, Wenham and colleagues (2020) found that the advising employees were generally unsatisfied and reported insecurity in the areas of employment satisfaction, including a lack of paid professional development opportunities, financial concerns, and a sense of social and professional exclusion. Advising employee turnover was high. The advisor’s job was solely to advise or complete functions related to advising such as offering seminars and workshops and completing assessments and making referrals.

Similar to my advising role, the WIL advisors stated a major part of their job was offering pastoral support to the students. The advisors where I am employed may organize seminars and workshops for students; however, they are not responsible for presenting the workshop itself. The study identified some of the reasons why the advisor turnover was high, which included low pay, lack of autonomy, and high mental workload. The advisors reported they felt as if they always had to be available and monitor emails from students since they had to help students with nonacademic, personal, or family related matters. This vast mental workload had a negative effect on the employee’s personal growth in their PhD coursework.

WIL advisors requested more training for supporting students in mental crisis, working with international students, and supporting individuals who were first-generation college students (Wenham, et al, 2020, p. 1034). As described by Wenham and colleagues (2020),

A few academic advisors noted they were expected to offer a lot of support to students in terms of reminders and following up. They claimed that students were being spoon-fed rather than taking responsibility, which placed a higher burden and workload onto academic advisors. (p. 1034)

The developmental advising approach, built on coaching skills, could address this issue.

Coaching skills are addressed in the next section,

These study findings are comparable to my experience. I spend a lot of time forwarding messages from other departments or sending multiple reminders to students and faculty to ensure the message was received. As noted by Wenham and colleagues (2020), “The support that academic advisors considered most helpful was having senior staff who were supportive, available and experienced to help them to deal with complex issues” (p. 1035). Dissimilar to where the research for this capstone took place, supervisors do not provide support to students. The supervisor is also the office manager who provides staff supervision and faculty support. The study at Griffith University presented research on how the advisor can better support the students. The literature review was limited on how the advisor could learn, train, and evolve to become better at their job. This discussion indicates the need for more research in training academic advisors.

Coaching in Academia

The peer-reviewed literature regarding coaching in academia is limited. The literature related to mentoring programs, career coaching, or in relation to faculty

development was not included in this review because the focus of this study is academic advising. However, in a peer-reviewed interview by Webberman and Carter (2011), Carol J. Carter (a student success expert and author) speaks about bringing her experience from business—a setting in which coaching is common—into academia. Carter said, “Educators who are trained in academic coaching skills learn how to use powerful questions to facilitate these sometimes personal moments, which can really build an emotional bond between faculty and students” (Webberman & Carter, 2011, p. 18). The interviewee notes that coaching uses many tools. Of the tools used, powerful questioning was the most applicable tool for student interactions, followed by asking the student to commit to an action.

Carter defines academic coaching as “an ongoing partnership to help students produce fulfilling results in their lives. Through the process of coaching, students deepen their learning, take responsibility for their actions, improve their effectiveness, and consciously create their outcomes in life” (Webberman & Carter, 2011, p. 19).

Rogers (2016) defines coaching as “a simple one that conceals complexity” and shares the following insights:

The coach works with clients to achieve speedy, increased and sustainable effectiveness in their lives and career through focused learning. The coach’s sole aim is to work with the client to achieve all the client’s potential—as defined by the client. (p. 7)

She expands on her definition with principles that help distinguish coaching from other disciplines. Her first principle is the client is resourceful, reminding coaches that the client has the resources to resolve their problems. Her second principle states that “the coach’s role is to develop the client’s resourcefulness through skillful questioning, challenge and support” (p. 7), which aligns with proactive and developmental advising as

does her fourth principle that “the client sets the agenda” (p. 8). Sharing core coaching techniques such as listening and asking questions reflect how advisors can apply these principles to their advising.

I have experienced the success of using coaching in academia to support students. In my experience students proved to be more committed to the path forward when they were the one who decided on the process to reach their goal, which reflects Rogers’ (2016) fourth principle. In one advising instance, a student was having communication issues with their research advisor. The student had a list of questions prepared for each faculty advising meeting, to which they could never find the opportunity to ask due to the competing agenda of the faculty advisor. When asked what they have already done to improve the issue, they said they were thinking about emailing their questions to the faculty advisor in advance so the faculty advisor would become aware of their agenda. I then asked if they would like to make this a goal for their next faculty advisor meeting, and they agreed to this suggestion.

Throughout the interview Carter discussed how she uses the core of academic coaching—namely, “powerful questioning, vision, and accountability”—to customize advising interactions with a diverse student (Webberman & Carter, 2011, p. 18). Of special note is the coaching for developmental advising may often precede or follow prescriptive advising to resolve a problem or place the student on the right track.

The process of coaching can change the relationship to a shared process, which corresponds to Rogers’ (2016) fifth principle that “the coach and the client are equals” (p. 8), working together with respect and without judgment. I did follow-up with the student and learned that although not all their questions were answered, they did receive some

answers. With this small win, the student was encouraged to continue this process of sending the questions in advance, which affords the student some of the answers yet reportedly still not all.

Stoltzfus's (2008) coaching questions demonstrates the power of asking the right questions at the right time, noting the skill of asking powerful questions built on active listening that includes hearing, observing, and interpreting the client's conversation with the coach. Such skills are the essence of good coaching and the skill development of effective coaches. As Schein (2009) described, this helping relationship is a process of "humble inquiry" (p. 66), noting the importance of powerful questions asked in an open-ended and genuinely curious manner. This approach helps the client own their situation while seeking help. The obligation of ownership remains with the client, empowering the client in the process.

Adult Learning

Staff advisors serve in student support positions focused on the educational advancement of those enrolled in the programs they serve. Although both university level students and staff members can be considered adult learners, the learning objectives of each group typically cannot be achieved through the same methods. The student is in the university to learn and earn a degree. Staff members are employed to effectively carry out their roles in support of the programs, faculty, and students. Thus, unless staff members are mandated to enroll in training or have a strong personal desire to learn, other competing demands can outweigh the attempt at continuing formal learning and development.

Although learning takes place informally in workplaces as employees develop their skills and knowledge to better fulfill their roles, developing a training program for staff advisors can apply adult learning principles. Knowles' (2005) six principles of adult learning is the andragogical model for the adult learner that take into account that adults need to have a holistic understanding of why they need to learn something, including the benefits and cost of not learning it. Adults have a need for self-direction and have diverse life experiences. Adults seek out learning when a need arises and learn best in “context application to real-life situations,” and in response to external stimuli (Knowles, 2005, p. 67-68). Applying Knowles's work to this capstone points out the need to design a training program for staff advisors in such a way that the advisors learn not only their training needs but also how they can play a role in designing the training. They require immediate use of the learning to address specific problems. Additionally, adult learning can incorporate actual workplace occurrences and present the resources in the context of advising. The training program can also highlight the benefits and adverse costs of additional trainings. Training can be designed to better serve the adult learner through action learning.

Action learning is a method that focuses on asking the right questions through “small group of people solving real problems, while at the same time focusing on what they are learning and how their learning can benefit each group member, the group itself and the organization as a whole” through active listening (Marquardt as cited in Faller et al., 2020, p. 292). Action learning is relevant because it relates to adult learning and its relationship to workplace application. Action learning identifies what needs to happen for

the transfer and application of learning from the classroom/training room to the workplace.

A goal of this capstone was to develop a training program for academic advisors because the current training is part of onboarding and is a one-to-one learning experience that doesn't provide opportunities for group discussions and shared learning. Knowles identified several characteristics of adult learners that are reflected in the academic advisors, including the need to know, experience, self-concept, problem orientation, and motivation, which are building blocks for an effective training program. When a question arises, the procedure is to reach out to one or more colleagues to have an isolated one-on-one information exchange. Although this process generally results in an acceptable outcome, the benefit of the knowledge shared is granted only to the person asking the question. In group learning settings, all participants would have the opportunity to learn how each advisor addresses an issue, ask clarifying questions, and have the opportunity to consider if they, too, can improve their process should the opportunity arise.

As noted by Marquardt (2004),

Through a series of questions, the coach enables group members to reflect on how they listen, how they may better frame the problem, how they give each other feedback, how they're planning and working, and what assumptions may be shaping their beliefs and actions. (p. 29)

At times these one-on-one interactions have resulted in learning another department had already substantially researched the issue and resulted in optimal outcomes. In such cases these initiatives were immediately implemented or required only minor modifications to meet the specific needs of the department. In both cases, knowledge sharing saved time and resources. Marquardt (2004) describes the process of action learning as the group reviewing and then reframing the problem, determining the

desired outcome, and developing implementable strategies that the group commits to under the guidance of a coach facilitator (p. 30). Formal action learning offers a framework to facilitate academic advisor conversations that currently take place in isolation, thus providing greater opportunity for effective student support.

CHAPTER 3

METHODOLOGY

This chapter describes the methodology used in this case study, including a review of the literature that informed the needs assessment process of interviews, data analysis, and interpretation. Based on the needs assessment, an academic advisors training program process was developed, including three levels of training based on participant knowledge, expertise, and skill development needs.

My experience as an advisor and a participant in the Organizational Dynamics program have led me to see a need for a student advising training program. In addition to the literature review presented in Chapter 2, I made the decision to speak with others in the student advising profession and learn about their priorities and needs within a training program.

To accomplish this objective, I interviewed members of the student advising team, which included advising professionals from one school at an Ivy League university. The school selected for this capstone study was chosen based on this author's strong networking ties and accessibility.

Those individuals included in the interview process were departmental and school level staff advisors and departmental managers. More specifically, the interviews included:

- Departmental academic staff advisors: A total of 19 staff advisors were interviewed from every department to learn more about their identity, background, and training needs as advisors.

- School level staff advisors: Two school level advisors were included because they provided a unique perspective in that they meet with students from each of the six departments within the school.
- Departmental managers: Five departmental managers were included because they have the authority to approve training for the staff they supervise.

The purpose of this study was to identify the training needs of staff advisors with the goal of creating a training process for the advisors.

Interview requests were emailed by me to all departmental staff who advise students. The years of experience of those interviewed ranged from entry level to expert. One staff advisor made this comment: “When I was an undergrad, I was overwhelmed with getting my schedule worked out. I was stressed out and my advisor helped me. This experience made me want to be an advisor.” Interviews lasted from 25 to 40 minutes and were conducted using the conferencing software Zoom. All participants gave verbal consent for notes to be taken and were assured anonymity. Anonymity was explained, noting that any identifying information of the interview participant and the specific department or unit where they work would be removed.

Qualitative interviewing was selected as the method for this capstone study due to the academic and cultural differences among the six departments, each one having unique requirements to best prepare the student for a career in the chosen field. Using questions from Stoltzfus’s book entitled *Coaching Questions: A Coach’s Guide to Powerful Asking Skills* (2008) as a guide, interview questions were arranged into three categories: advising, onboarding, and training workshop. Table 2 provides the questions that were asked to each interviewee.

Table 2. Interview Questions

Interview Questions: Staff Advisors		
Advising	Onboarding	Training Workshop
<ul style="list-style-type: none"> • Tell me what attracted you to advising? • Imagine I am a new student coming to you for advice, can you describe the process? • Can you share with me your biggest advising success? • Tell me about your most challenging student? • How do students know what to come talk to you about? • Other than degree requirements, rules and regulations, what topics do students come to you for assistance with? • If someone was interested in becoming an academic advisor, what advice would you give them? What skills would they need to learn? 	<ul style="list-style-type: none"> • Can you describe your student advising onboarding? • What was the one area you felt you received the least amount of training on that is essential to your position? • If you needed/assigned training, who usually approves/assigns it? 	<ul style="list-style-type: none"> • If you were developing a workshop to assist in the training of staff advisors, what do you feel are core topics that should be included?
Interview Questions: Managers		
Staff Advisor	Onboarding	Training Workshop
<ul style="list-style-type: none"> • Imagine your ideal staff advisor. Can you describe them? • Tell me about your best staff advisor and why they are the best. • Imagine your worst staff advisor, what made them the worst? 	<ul style="list-style-type: none"> • Tell me about how staff advisors are trained in your department? 	<ul style="list-style-type: none"> • If a workshop was being developed to assist in the training of staff advisors, what do you feel are core topics that should be included? • If training was available, would you make it available to your employees?

After each interview, the researcher recorded the interviewee's responses and aggregated the content to identify trends and unique perspectives. The outcome of the

interviews informed the researcher's analysis to identify the most important needs and considerations when developing an advisor training program for staff members. These findings are analyzed and presented in Chapter 3. Chapter 4 is the application of the analysis and interpretation of the data in designing the proposed training program for academic advisors.

CHAPTER 4

DATA ANALYSIS

Advising Culture Shifts

When I accepted my position in 2000, advising positions at the school required applicants to have a minimum of a high school diploma. At the time of my hire, I was one of only a few staff members within the school who had earned a bachelor's degree. The two most recent job postings for an advisor in the same school now require a bachelor's degree. Interestingly, seven out of the 19 advisors interviewed for this capstone study shared they entered their current position with a master's degree, and most others had earned a bachelor's degree. Only one manager reported having a related degree as a characteristic of their ideal staff advisor. The trend of an increase in academic advancement within the school's advising population demonstrates a clear progression in degree qualification expectations and how competitive the field has become.

As noted by Khine (2019),

The *Harvard Business Review* termed this rising demand for a four-year college degree for jobs that previously did not require one as "Degree Inflation." Employers are requiring a four-year-degree as a way to help ensure they are attracting employees with not only strong hard skills, but also more sophisticated soft skills. (para. 3)

A formalized training workshop can help provide appropriate training for all advisors, no matter their degree qualifications. Another shift identified through the interviews and my personal experience was a culture shift in the way students are advised in the school.

In 2000 most of the formal advising of students was performed by a faculty member with staff as an administrative resource. Over time the student population grew disproportionately to faculty growth. During this same time my advising skills seemed to develop naturally as I learned more about the program, enrolled in professional development coursework, and the students started to trust me. Departments started relying on staff more to know the administrative policies and degree requirements, which allowed faculty to focus on higher level questions directly related to the major.

As noted by Yudof (2003),

Advisors must implement the faculty's requirements while working with students as they identify their own needs and interests; they should listen to students and take them seriously; they should minimize friction between students and the institution and its requirements; and they should enable advisees to make ever-more-enlightened decisions. (p. 8)

Currently, staff advisors work with faculty advisors as a team to assist students.

Although this change has happened slowly over the course of 2 decades, the role and expectations of the staff advisor are evolving, and the staff members need to be provided with the necessary training to support the current advising culture and prepare for future changes.

Current Advisor Training

During their interviews staff advisors were asked to describe what their training was like when they were hired for their current position. Approximately 75% reported having had little or no formal training. This finding was not a surprise because I also had little training when I joined. The unwritten culture of the school is that staff train peer staff and office managers have little or no involvement in this process as it relates to advising. One respondent made this comment: "I remember feeling overwhelmed and

terrified....You have this power to help the students, but if you don't have the right tools, you could steer them in a dangerous way.” Many of the departmental advisors gave training credit to the school level advisors who, as I mentioned previously, know a little about each department so they can guide students. The remaining 25% of the interviewees were in a unique position in which their predecessor was available to train them in some capacity from 1 week to 1 year.

During my onboarding I did not have any formal training aside from learning how to access the student records interface. I was given the student handbooks, directed to the website, and told to ask questions of my colleagues in other departments. All of the staff advisors interviewed for this capstone study stated they had to figure out most aspects of their jobs on their own or with help from colleagues in similar roles. More than half of the advisors referred to their training as trial by fire or learning on the job. A training workshop can address these onboarding gaps by providing advisors with a transparent understanding of the ideal expected job performance expectations while also creating a network for advisors.

All of the advisors interviewed for this capstone study indicated they felt a training workshop was a need not currently being fulfilled. Every manager interviewed said they would make advisor specific training available to their advising staff. One advisor and one manager indicated a training workshop should be mandatory. Having the training labeled as required may serve multiple purposes. Required training communicates to all stakeholders that the information presented in the course is important and official. It also guarantees that every advisor receives the same level of foundational support to begin a successful journey in their new role. The training can allow for a

holistic introduction to the university, school, and position. Mandatory training at the onset of employment can serve as part of the transition process and allow for a smoother acclimation period rather than advising students on day one. As Bridges (1986) points out when examining change in an organization,

No one can begin a new role or have a new purpose if that person has not let go of the old role or purpose first. Whether people are moved or promoted, outplaced or reassigned, they have to let go of who they were and where they have been if they are to make a successful transition. (p. 25)

Advising Challenges

After hearing multiple perspectives on advising, several challenges were illuminated about fundamental training areas in which professional development training would be beneficial. When asked to share their most challenging advising situation, few commonalities were identified in the advisors' responses. The variety in responses is another indicator that skill levels vary vastly depending on the individual advisor, showing training needs at different levels.

Several of the respondents who serve the undergraduate student population noted dealing with parents as their biggest challenge. Since the advisors who serve the undergraduate population ($n = 9$) interact with parents and legal guardians, this finding highlights a need for training in the areas of active listening and an understanding of the department, school, and university services to be able to respond to broader inquiries.

Most challenges reported by the interviewees could be characterized as communication issues. One advisor shared this student exchange: "They were yelling at me. I told them I am here to help you have success. Let me help you." Two respondents found being new to the position as the biggest challenge to advising. Only two respondents mentioned the challenge of helping students in crisis. This finding came as a

reminder to me about how no training was provided on this topic when I became an advisor; therefore, I expected more participants to see the need to help students in crisis as a challenge. In recent years student wellness has taken front stage so many training sessions are available to staff on how to respond when a student comes to you with a wellness issue. Therefore, the workshop can include information on how advisors can access these university level training sessions. The responses from the interviewees were so plentiful; the information needed to be organized into core training categories.

Core Training Needs

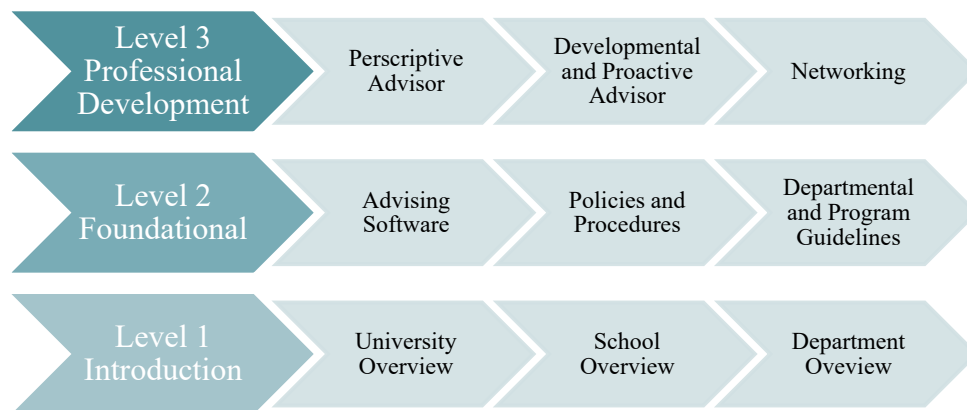
Sorting the data clearly showed a need for three levels of advisor training. Three dominant core topic areas emerged from the responses and were categorized as introduction, foundational, and professional development (see Figure 1). The levels were organized to represent the stages of learning in which each level builds on the previous one in a natural flow. For example, before training advisors on academic coaching strategies, the advisor needs to understand how to register a student for a course. The manager's responses to core training topics were also arranged into the same three levels as the advisors' responses. When compared, the core training topic suggestions from managers and advisors had many commonalities, reinforcing once again a need for training at all three levels. One manager declared that "if an advisor leaves the position, then there is no one there to train the next person," which holds true for most departments. Therefore, it was no surprise that every manager interviewed thought formalized training was necessary for their advising staff.

Throughout the course of the interviews, the interviewees noted core advising duties common across all departments. Additionally, each advisor had responsibilities

unique to their department. Some advisors communicated a need for additional training in those areas. The workshop can focus on core topics applicable to all those in an advising role. For example, some advisors are charged with creating and maintaining webpages, social media platforms, and advertising campaigns. Since not all advisors are responsible for these tasks, these unique training needs are not to be addressed in the workshop.

Duties specific to the department can be left to the department to train because they know best about their department's needs. Categorized responses are discussed in detail, beginning with Level 1.

Figure 1. The Staff Advisor Training Program



Level 1 Introduction

University Overview

As with most large universities, the numbers of departments, centers, labs, and resources are vast. Therefore, it was no revelation when 37% of advisors and 80% of managers felt an introduction to the university, school, and department were core topics that the workshop should include specific to the new hire's position. As part of the university level onboarding process, new hires watch a video that provides a general

overview of the university. This video is the same no matter one's position and is not specific to advisors. One interviewee commented, "I struggle with other university resources. People ask me questions and I might not know where to send them...." A total of 11 of the 19 staff advisors interviewed mentioned not having had any formal training period; they started doing their job from day one. It was also stated that new staff advisors should be immediately connected to the university's student affairs group, which helps connect staff and offers programming to those interacting with students. Many respondents indicated new staff should also receive guidance on how and where to go for assistance with a university level issue. Regardless of which department an advisor is employed in, many common topics were identified that all those interacting with students would benefit from, which therefore shows a need for additional training in this area.

School Overview

Almost all advisors and 60% of the managers indicated training should include an overview of the school along with a tip sheet that clearly outlines the most commonly used services and departments an advisor would typically interact with in the school. Many such guides for students help them navigate the educational system but none are specifically designed to help the advising staff. The proposed training can include the creation of tip sheet, which can be peer-reviewed annually, perhaps even at an advisor retreat.

Department Overview

One manager described hosting an event for the new hire in which the members of the department can be introduced. Only two advisors specifically mentioned a need for a departmental overview as part of a training workshop; however, the need for more

initial information from the department was expressed by almost half of the advisors interviewed. One advisor stated that they thought of the school level advisor as their manager because that is who they go to for answers. School level advisors do not manage departmental advisors and play no role in each advisor's yearly performance review or training requests, which are the responsibility of the department manager. Although the need for a department overview was not as strong compared to the other needs expressed, an introduction to the department, along with a clear explanation of the organizational chart, plays an important part in the new hire's understanding the reporting structure. After the advisor is oriented to a general overview of their new position, Level 2 training needs were identified.

Level 2 Foundational

Advising Software

The number one response to the training need most essential to an advisor was the electronic advising tools, which was mentioned by 32% of the advisors and stated more than two dozen times during the interviews. This finding came as a surprise because I have long since mastered the electronic systems to exceed my department's needs. These platforms include the registration, advising, and course maintenance programs. Multiple approvals are needed to gain access to any platform that contains sensitive student information. Yet, only one of the systems requires training. No formal training is provided for the other programs.

The university level training is useful for an overview of the system. However, in daily interactions with students, the systems are used for specific functions related to advising. Only some of these precise advising functions were mentioned in the

mandatory training I received. After a new advisor completes the required training, I provide them with a concise list of advisor functions relevant to our daily work and spend some time going over each function. Many senior advisors also expressed challenges using the electronic tools. A module on electronic advising tools was not originally planned for the workshop. However, the data clearly exposed a strong need in this area across all departments. Knowing how to use the advising tools must be included in a training workshop for advisors because it lays the foundation for future prescriptive advising interactions.

Miscellaneous Software Training Needs

Additional software training needs were identified during the interviews such as how to make a PDF document, Microsoft Office, and online conferencing software. These needs were mentioned only a couple of times by a pair of respondents so therefore are not included in the workshop. Instead, at the workshop a brief introduction to the on-demand asynchronous training platform available to all university employees can be introduced. As noted by Weber, a Columbia University cognitive scientist:

We attend to the present, what's needed for success now," ... "But this is bad for far-sighted goals, which are not given the same priority in the mind. Future focus becomes a luxury, waiting for current needs to be taken care of first. (as cited in Goleman, 2014, p. 35)

Future focus in academia is needed now, according to the data collected in the interviews, to meet the ever-changing needs of the staff adult learner and the student adult learners they serve. During this training session participants can be introduced to the platform and its capabilities and shown how to search for courses that meet their individual learning needs now or when a new need or desire to learn emerges.

Policies and Procedures

Not one advisor reported receiving any training on current university or school level policies and procedures as a new hire. Changes to policy and procedures were reportedly announced at monthly meetings hosted by school level advisors to disseminate this new information. A total of 47% of the advisors interviewed stated their ideal training workshop would include an introduction to the university and school, along with the relevant policies and procedures related to the advisor's responsibilities. Four out of 5 managers interviewed also indicated they felt introductions to the university, school, and department were core topics that should be included in the workshop.

Departmental and Program Guidelines

Of those interviewed, three advisors who had less than a year experience in their current position expressed dissatisfaction with the lack of formal introduction and direction on the departmental level. If an advisor is hired at an especially busy time of the year, onboarding may be a low priority due to other competing demands. A formal training workshop, offered at regular intervals, can guarantee all new advisors receive the same foundational training to succeed as advisors.

Of the 19 advisors interviewed, 21% reported they had been provided with a departmental guidebook or other documentation to review independently. Still, several advisors also reported what they were given was out of date and not comprehensive. Half of those who received materials reported having someone to go over the documents with so they could ask questions. Although individual departmental rules and requirements are not addressed in this workshop, managers can be provided with a list of topics that staff advisors need to understand so they can be successful in their role, including program rules, regulations, and departmental policies and procedures. Most advisors mentioned

learning the degree requirements specific to their program was a core topic. However, as two advisors noted, the student handbooks are comprehensive so staff members can digest the material on their own. Substantial differences were identified in how managers and advisors viewed the departmental onboarding process.

A total of 80% of the managers reported providing their staff with a written manual as opposed to 21% of the advisors reporting receiving a manual. The differences in reports of manuals received could be due to manager and advisor turnover. An advisor may have reported not receiving a manual when onboarded; however, their manager may no longer be employed. The new manager may now be offering manuals. Differences may also exist in what the manager and advisor believe an onboarding manual should contain. For example, each degree program has a document outlining the degree program's requirements. This document is indeed a guidebook, but it is a guidebook for students, not one that details how the advisor should function in their position. Formalizing the advisor training process can add clarity for advisors and managers on their core advising responsibilities.

Advisors who receive training on the software needed to access student records and planning tools, along with training on university, school, and departmental policies and procedures, can perform prescriptive advising duties at a satisfactory level. The last theme from the data collected regarding the workshop was professional development.

Level 3 Professional Development

The data collected from this capstone study supported my original quest to develop a professional development workshop for advisors to enhance their advising interactions. Interview responses directly related to the original proposed workshop

included advising theories, active listening, building rapport, working collaboratively, coaching, student development theory, and networking. One advisor commented: “Understanding the dynamics of relationship building is necessary. I’ve seen others who didn’t understand or had poor relationships with other offices and that hurt the students in the long term.” Many of these needs can be addressed in the workshop through offering modules on emotional intelligence, self-awareness, clear communication, role-playing, coaching, empathy, and networking.

Prescriptive Advisors

The goal of the advising themed portion of the interview was to learn more about the advisor as a person to discover what their training needs are in advising. In response to being asked about what attracted them to advising, all 19 staff advisors reported that one of the main reasons they wanted to be an advisor was because they liked helping people and advising students. All advisors were currently performing prescriptive advising at various levels. Participants defined prescriptive advising as answering direct closed-ended questions concerning assistance with a policy or procedure. However, responses showed a divide between staff advisors who performed mainly prescriptive advising and those who also offer developmental advising on some level. No participant described a proactive system in which they would initiate unsolicited contact with the student unless they were made aware of a specific issue. Foundational training on how to perform prescriptive advising begins with Level 2 training. Level 3 training can focus on the skills that will allow advisors to evolve so they are able to offer developmental advising and introduce advisors to proactive advising.

Developmental Advisors

Those who practiced developmental advising seem to have a slight correlation to the staff advisors who had a background in teaching or mentioned a calling to advising in some manner. Developmental advising was described as asking students about their goals and interests in addition to discussing the issue on the student's agenda. This finding reflects the following comment by Crookston (2009) that "the developmental advisor believes that students can find satisfaction in work accomplishment...and... moves to shift the responsibility to the student while working to provide the student with problem-solving and decision-making skills" (pp.79-80). All but three advisors reported framing the initial advising interaction to include time to get to know the student as a person. One advisor stated, "I walk them through their options, look at their plan and degree requirements, but we also look at the individual, and design custom plans for them." All three advisors who did not describe the initial advising meeting to have a personal component told of an interaction in which they allowed the student to set the agenda and directly answered the prescriptive questions asked. "Students...who experienced developmental advising showed a higher degree of satisfaction than those who received prescriptive advising" (Harris, 2018, p. 37).

The data show different levels of advising experience and styles of individual staff advisors, reinforcing the need to offer multiple levels of training. In the spring of 2020, in response to the global pandemic, all in-person academic operations were suspended at the university; therefore, all interactions were forced to become virtual. To satisfy the need to maintain a connection, I piloted a proactive advising initiative for students enrolled in one of the programs I managed.

Proactive Advisors

With support from my faculty graduate group chair, the goal of my proactive advising initiative was to personally reach out to each student in the program. I wanted the students to feel connected to their departmental home office in a time of isolation and to make sure there were not any unknown issues. Proactive “advising is a concept based on deliberate intervention to identify a problem in order to motivate a student to seek help” (Earl, 1988, p. 32). Prior to reaching out, I checked the student’s academic record, made any necessary updates, and noted any areas of concern. When I did reach out, I explained I was saying hello, checking to see how they were doing, and asking if they needed anything they thought I could assist them with. I would also use this opportunity to point out if they needed something related to their academic progress. I included this academic component because I know each student on a different level; this was one area in which I could standardize my support yet customize it to them specifically. I chose three to five students each week and reached out to them.

The response I received was overwhelmingly positive. Many students responded with a simple thank you and expressed gratitude for the connection. Others took this opportunity to ask me a question they had put off. A few responses indicated the person was either in need of a follow-up discussion via Zoom or telephone to discuss a wellness or interpersonal issue. This project took two semesters to complete. This level of proactive advising was personally quite satisfying yet extremely time-consuming. Although saving time was not a goal of the proactive advising initiative, the time commitment should be taken into consideration when planning new advising programming.

The differences in advising practices show inconsistencies in the advising services offered, which reinforces the previously mentioned cultural differences between departments. The training workshop can clearly establish the baseline training for staff to effectively advise students. Attendees can be provided with an overview of all three levels of advising along with guidance and best practices for each level.

Nonacademic Advising Needs

Students have always come to me with questions on nonacademic matters. Over the years I have come to question how much nonacademic advice is appropriate for me to offer in response. When I use coaching practices at work, it is often in these nonacademic interactions. Therefore, this question was asked of all advisors to see if my experiences are unique and if students in other departments also hoped for nonacademic assistance from their staff advisor. The data collected outlined many areas advisors are relied upon for information outside of academics. Most advisors interviewed told stories of being asked questions and then needing to research the answers to provide the student with direction. Hearing the advisor's response to my request to list the breadth of topics students ask them for advice on gave me the impression that most advisors are content in assisting students and share knowledge, no matter the subject.

However, what if that knowledge is inaccurate? What if the student is asking for advice on a topic the advisor should not be advising on? What potential damage might be done if an advisor is biased and leads the student to follow a path that has undesired irreversible consequences?

Approximately 90% of the staff advisors indicated the students sought their assistance on a wide range of issues such as mental wellness, financial, family, romantic

relations, and international laws. Of the two staff advisors who did not report providing nonacademic support, one had a year of experience advising and the other had been in their position for over 10 years. Thus, the absence of students approaching them for nonacademic advice might be directly related to the individual advisor's student services offered, not the level of training. The responses were categorized into 20 unique areas in which students seek nonacademic support from the advisor. Advising staff trained in the fundamental coaching techniques can apply those skills to nonacademic requests, thereby empowering the student to design the solution that works best for them.

Networking

A total of 37% of the advisors interviewed mentioned the need for better networking opportunities for staff. Two advisors mentioned the need for a formal shadowing process in which staff are paired with other staff in similar positions so they have a direct contact of who they could go to for advice. One respondent stated that the workshop should include "social events and meetings with the team and groups...(as) a way to talk about what works and what is not working." Networking is important at all stages of an advisor's career. As noted by De Jansz and Forret (2008), "Developing and maintaining relationships with others for the purpose of mutual benefit can help individuals...gain access to needed information or resources...and obtain guidance, sponsorship, and social support" (p. 629). The lack of networking opportunities was a need identified throughout the interviews so the workshop can include a networking component to help the staff advisors start the process of becoming connected.

Hidden Barriers to Training

Professional development training is available to staff at the university level

through brown bag lunches, seminars, workshops, and formal coursework. Of these training options, coursework offers the most options related to advancing advising skills. Other training sessions offered are designed to appeal to the entire university, not to any one specialization such as advising. To participate in formal courses offered by the university, one must be enrolled in a degree program. Less than 15% of the advisors interviewed were currently enrolled in a degree program at the time of the interviews, which is a barrier for almost 85% of the advisors. Manager approval is required for any advisor wanting to take advantage of these training sessions during work hours including approval for the funds if a charge applies for a course. The biggest barrier for me personally was trying to schedule the time to take the training while still achieving my productivity goals. A formalized training program sanctioned by the school can reduce, if not eliminate, access barriers to training for staff advisors.

Summary

Two decades ago, each department had three staff members; only two staff members were in student support positions. Employee turnover is random so hiring is done on-demand. Twenty years ago, a formal training course was not cost-effective for a single new hire. However, staff populations have doubled or tripled in some departments during this time, making a formalized training more economical. Additionally, with technological advances we can record segments of a training workshop that could be made available on-demand. Most importantly, every single manager and advisor interviewed stated the training needs of advisors are not currently being met. All of the advisors interviewed indicated they would be interested in advisor specific training. Every manager said they would support their advising staff attending the training. Two

managers responded that they would “absolutely” participate in the training for themselves. Chapter 5 describes the design of the proposed Academic Advisors Training Program with three distinct levels of training, based on the results of the needs assessment.

CHAPTER 5

DESIGNING THE TRAINING PROGRAM

Through the interviews, research, and my own experiences, I was able to determine a need for formalized training. Yet, the results showed a need larger than this capstone researcher originally imagined. The training program was designed using Blank and Russell's Programing Planning Model for Adult and Continuing Education (2000) and Knowles' (2005) six principles of adult learning as a guide; it is organized into the three levels: Introduction, Foundational, and Professional Development, which were identified in the needs assessment (see Figure 1).

Training Program

The Academic Advisor Training Program is designed to meet the needs of participants on three levels, based on their experience and knowledge. The three levels and recommended modules are presented below.

Level 1, Introduction

The objective of Level 1 training is to provide a basic understanding of the university environment as it relates to advisors and the resources necessary to support their advising role in student support services. As revealed through the data analysis, advising staff are not exposed to formal training sessions specific to advising. Therefore, in addition to the university's general orientation for all staff, the first level of the workshop focuses on these areas because it directly relates to staff advisors in the form of three separate modules. The target audience for Level 1 training includes entry level advisors and advisors who may be new to the department, school, or university. Senior

advisors wishing to refresh their introductory knowledge in these areas can also benefit from attending Level 1 training. The main topics for this section of the training were built as a direct result of the information collected in the interviews. Level 1 core training topics are outlined below.

University Resources

- Academic calendar
- Recommended university level trainings for advisors
- University level groups and organizations

School Overview

- Overview of school's leadership, organizational chart, and goals
- School offices, departments, and programs offered
- Advising staff directory

Department Overview

- Overview of department's leadership, organizational chart, and goals
- Degrees, certificates, and programs offered
- Departmental events, seminars, and workshops

Module 1, University Resources

The training program begins with participants engaging in a reflection circle exercise built on what drew each participant to an advising role. As described by Shaina and Abraham (2017),

Reflection circles would allow participants time to reflect about their own passions, values and goals related to their work...Participants would be able to learn about and from their colleagues...while helping to develop their understanding of their goals and values for the work.” (p. 54)

After the training cohort has had a chance to get to know each other, an introduction to the university’s academic calendar is given along with a general outline of an advisor’s workflow throughout the year. The calendar highlights dates for recommended university level trainings. Module 1 concludes with an overview of the university level groups and organizations relevant to professional development and student support.

Module 2, School Overview

The second module provides a general overview of the hiring school’s organizational structure and goals. Advisors are provided with information on the school offices, departments, and academic program offerings, including how they can expect to interact with each one. An advisor directory can be provided to guide advisors to colleagues who can offer support and collaboration. During this training module advisors can have the opportunity to ask questions and network with other attendees.

Module 3, Department Overview

The final module is dedicated to providing information directly related to the advisor’s hiring department. Advisors can leave the training with a holistic understanding of the department’s structure and offerings. Upon completion of Level 1 training, participants can have a clear understanding of the organizational structure of the university, school, and departments as it relates to an advising role.

Training Program, Level 2, Foundational

The goal of Level 2 training is to provide the foundational skills and knowledge required to perform prescriptive advising duties. Foundational training topics consist of

the advising tools and software used by advisors, policies and procedures related to advising, and direction to the departmental and program guidelines specific to the programs the advisor interacts with and supports. The target audience for Level 2 training is Level 1 participants. Advisors with less than 3 years of experience and senior advisors who may wish to refresh their institutional knowledge or fill gaps would also benefit from attending. Level 2 core training topics are outlined below.

Module 1, Advising Software

Upon completion of Level 2 training, advisors will possess the foundational skills required to perform prescriptive advising duties. Specifically, participants will have hands-on access to each advising software tool and the opportunity to practice without the fear of making a mistake. Advisors will have the chance to ask questions and receive feedback. Additionally, an overview of the asynchronous training platform will be provided.

The overall goal of Level 2 training is “to help learners construct whatever foundational knowledge base is needed to give them self-confidence in their own ability to plan and perform their learning projects and assume responsibility for their own learning” (Alvarez & Towne, 2016, p. 13). Providing direction to the asynchronous training platform can address the individual training needs discovered in the interviews that were not substantial enough to be included in the training workshop.

Module 2, Policies and Procedures

Before the first meeting with a student, advisors need to understand the relevant laws, policies, procedures, and codes. Level 2 training can clarify and solicit questions about regulations such as the Family Educational Rights and Privacy Act, Title IX, Code

of Academic Integrity, and the Code of Student Conduct. Next, an orientation to the school level degree requirements, policies, and forms can be presented. Attendees can leave the training with materials they can digest on their own, along with direction on where to go for answers to any future questions that may arise.

Module 3, Program Guidelines

In the final module of Level 2 training, participants are given guidance on core advising duties in relation to the degree requirements. Each participant can receive an advisor's guidebook for later reference. Advisors are given the opportunity to practice advising through role-playing scenarios based on actual advisor and student interactions with other attendees and receive feedback from the cohort.

Training Program, Level 3, Professional Development

Level 3 training is designed to assist seasoned advisors in taking their craft to a higher level. Advising staff are hired at varying points in their career, as gleaned through the capstone study interviews. Some advisors indicated they were fresh out of college, and others have decades of experience. The professional development module of the workshop serves as a continuation for those who participated in the first two levels of advisor training. Advisors participating in the training would be expected to have mastered prescriptive advising duties prior to the training. Level 3 core training topics are outlined below.

Enhancing Your Prescriptive Advising Skills

- Self-awareness
- Orientation visualization exercise
- Design thinking concept
- Improvement discovery exercise

Becoming a Developmental and Proactive Advisor

- What is an academic coach?
- Determine coachable moments
- Advisor-student scenario exercise
- Coaching questions
- Academic coach-student scenario exercise

Networking

- Building your advisor network
- Networking opportunity

Module 1, Enhancing Your Prescriptive Advising Skills

The first module of Level 3 begins with segments for prescriptive advisors to improve their current skill set through self-awareness and design thinking. Academic advisors can seek out self-awareness for personal growth. As noted by Rogers (2016), “you need to be an expert at self-management. You must be centered, self-aware and with a high degree of all the many intelligences that the role requires: analytical, emotional, spiritual and systems intelligence” (p. 54). In small groups, participants will work

through an orientation visualization exercise. The goal of the exercise is to examine the services currently provided by the advisors for use in developing a 60-second pitch for advisors to introduce the services they offer to the students at orientation. According to Dr. Tasha Eurich, a psychologist and executive coach, “self-awareness...means fully knowing who you are—your values, passions, goals, personality, strengths and weaknesses—and understanding how others perceive you” (Talesnik, 2019, p. 1). Those who are self-aware perform better in their job, command a higher level of respect, and trust of their coworkers, as well as being more effective in leadership positions (Talesnik, 2019). Advisors are provided the opportunity to pitch their talk to other members of the workshop and can receive feedback from other advisors and the workshop leader.

Next, advisors are introduced to design thinking for use in uncovering areas for self-improvement. Design thinking is “an analytic and creative process that engages a person in opportunities to experiment, create and prototype models, gather feedback, and redesign,” resulting in an improved process or experience (Razzouk & Shute, 2012, p. 330). Advisors can learn basic design thinking concepts to use along with a worksheet to examine the ways they interact and communicate with students to uncover improvement opportunities. The first module of Level 3 training concludes with participants receiving feedback from the workshop leader and other advisors on their improvement worksheet.

Module 2, Becoming a Developmental and Proactive Advisor

As shown through data collected in the interviews, no one unified understanding of the role of the academic advisor exists because each advisor performs their duties to varying degrees. Therefore, the second module of Level 2 training begins by introducing

participants to higher levels of advising through expanding their core definition of advising to include academic coaching.

What Is an Academic Coach?

Executive coaches support clients along their journey by facilitating discussions to channel the client's motivation toward higher levels of self-awareness, goal clarification, and ultimately, goal achievement. Executive coaching tools can be used by university administrators in student support roles such as staff advisors. Through applying executive coaching strategies and tools, academic advisors can offer a deeper level of student support and increase the student's satisfaction. Not unlike traditional staff advisors, academic coaches also advise on policies, procedures, and degree requirements. Academic coaches can be taught to offer unconditional positive regard to students through thoughtful questions and active listening. According to Joseph (2012), "Unconditional positive regard...means valuing the person as doing their best to move forward in their lives constructively and respecting the person's right to self-determination—no matter what they choose to do" (para. 6).

Academic coaches learn how to use developmental advising to uncover the student's thought process and rationale for the request. Through asking thoughtful questions, the academic coach can uncover what the student has already tried to solve their issue and discover if other options exist for them to consider. By using coaching to support students on their decision-making journey, the student retains ownership of the matter and personally creates the solution best for them (Rogers, 2016, pp. 202-203). The module continues with the next segment, which helps participants determine when the use of coaching skills is the appropriate response.

Determining Coachable Moments

In general, when a student asks for a fact, such as a policy or rule, the academic coach would still respond with prescriptive advising and provide the information requested. If the student is asking for advice on a subject that would be better answered by an expert in the field, then the academic coach may refer them to their faculty advisor. However, if a student is asking for the advisor's personal advice, then this may be a coachable moment.

As noted in the data analysis, approximately 90% of the staff advisors interviewed stated students sought out their assistance for nonacademic matters. Students are approaching advisors for assistance with nonacademic topics on a regular basis. "When you give advice, you imply that you know best and that the client is a lesser person" (Rogers, 2016, p. 8). Advisors can be provided with the knowledge and tools to know how to best respond to nonacademic questions. Participants can actively participate in an advisor-student scenario exercise and be given guidance to determine which type of advising is the best response for the advising engagement. After the participating advisor understands when to use coaching in developmental advising, participants can be taught how to ask coaching questions. Participants can be exposed to two questioning experts, Tony Stoltzfus and Jenny Rodgers.

Why Ask Questions?

Academic coaches are skilled at asking questions. In his book entitled *Coaching Questions: A Coach's Guide to Powerful Asking Skills*, (2008) Stoltzfus tells us five great reasons to ask questions, which are transferrable to academic advising (see Table 3). Regardless if the advising engagement is one-off or ongoing, each engagement is a

service to the student. Academic coaches need to make judgment calls to quickly survey the engagement and determine how best to support the student. Participants can be exposed to Stoltzfus's Great Reasons to Ask and how they are transferable for academia.

Table 3. Great Reasons to Ask in Academia (Source: Stoltzfus, 2008)

Stoltzfus's Great Reasons to Ask	Great Reasons to Ask in Academia
<ol style="list-style-type: none"> 1. All the information is with the coachee. 2. Asking creates buy-in. 3. Asking empowers. 4. Asking develops leadership capacity. 5. Asking creates authenticity. 	<ol style="list-style-type: none"> 1. The student is the expert of their unique situation. 2. Students will be more likely to follow through with a solution of their own design. 3. Students are adult learners and responsible for their actions. Therefore, students should have authority in designing outcomes for personal success. 4. Students taking a leadership position in their own life is an exercise that will help them develop as a leader. 5. Asking students thoughtful questions builds trust and strengthens the advisor/student relationship.

Coaching Questions

Advisors can use coaching questioning tools to help the student retain ownership of the issue and design the solution most appropriate for them. In her book entitled, *Coaching Skills*, Rogers (2016) outlines a series of 15 coaching questions that new coaches can use in response to a client's issue (pp. 97-98). Roger's questions are listed below and apply to developmental advisor-student interactions. In small groups, participants can role-play advising situations using the following coaching questions:

- What's the issue?
- What makes it an issue **now**?

- Who owns this issue/problem?
- How important is it on a 1 to 10 scale?
- Implications: What are the implications of doing nothing (or of letting things carry on as they are)?
- What have you already tried?
- Imagine this problem has been solved. What would you see, hear, and feel?
- What's standing in the way of that ideal outcome?
- What's your own responsibility for what's been happening?
- Imagine you're at your most resourceful. What do you say to yourself about the issue?
- What are the options for action here?
- What criteria will you use to judge the options?
- Which option seems the best one against those criteria?
- So what's the next/first step?
- When will you take it?

Each participant can have the opportunity to act as the advisor and as the student.

Advisors can receive feedback from the group and group facilitator.

Module 3, Networking

Networking was mentioned a total of 10 times across all interviews as a professional development improvement area; therefore, the final module of the Level 3 workshop can conclude with a segment on networking. As noted by Kiefer (2011),

Networking is not so much about using others to get ahead professionally as it is about opening lines of communication with colleagues. How will you ever know how they can help you, or how you can help them, if you never talk? (p. 2597).

Participants can be provided with direction on how to build and grow their network, in part using the materials provided from all three levels of the workshop. The Level 3 workshop concludes with a casual networking reception. Staff advisors within the school are invited to the reception where best networking practices can be shared. The goal of Level 3 training is to provide the knowledge advisors need to advance their advising skills, increase student satisfaction, and grow professionally.

Summary

The role of the academic staff advisor in higher education within a single school was explored in detail throughout this capstone study. A strong need for training was identified at three levels, Introduction, Foundational, and Professional Development. A workshop to address those needs was designed based on the literature reviewed, data collected, and my own personal observations as an advisor. All three levels of the training program could initially be offered over the summer months when most students are not in session. Individual workshop level trainings could then be offered on-demand based on need. The workshop materials can be updated as part of an annual review. Whenever possible, senior advisors are encouraged to participate and lead modules they excel at, which would allow the culture identified in the interviews of staff training of peer staff to continue. The training can build the advisor's confidence in their knowledge and ability to access information necessary to direct students and continue their learning on their own.

CHAPTER 6

SUMMARY AND CONCLUSIONS

Personal Reflections

The journey of this capstone began with a desire to create a one level professional development training program for advisors. I wish I had been exposed to developmental and proactive advising practices earlier in my career. When I first began supporting students, I was without direction and had to figure things out on my own or with the help of colleagues. Actively applying executive coaching skills in my academic advising interactions made me aware of a need for coaching in academia that was not being fulfilled. I knew using academic coaching was working when students began referring others to me for issues such as helping them work through a personal conflict they were having with another member of their lab. Coaching inquiries led the student to independently realize that they had already come up with a solution, but they were scared to try it. Expressing options of their own design gave the student the courage to commit to their plan to move forward and try to resolve the conflict. I could see the confidence on the student's face and hear it in their voice when the meeting ended. A student who has good working relationships with the members of their lab is an important element in having a positive educational experience.

I have seen firsthand the increase in student satisfaction through applying coaching skills to advising so I wanted to share this personal success with other advisors. The value added to the student experience from interacting with advisors who have had advanced training may be the biggest positive impact because they are the ones with the

most at stake. Hearing my colleagues' stories in the interviews illuminated a training need that was holistic and served the advisor at each stage in their career. The value added to the workshop through the discussions with my colleagues created two additional levels of training, and the workshop will be better for these additions. The opportunity to access my advising colleagues' seemingly endless generosity of knowledge sharing was a privilege.

Similar to many of the advisors interviewed for this study, I, too, felt a calling to advising and enjoy helping others reach their goals. My love for advising was almost immediate. Yet the skills to be a successful advisor took several years of coursework and independent study to learn. The first goal of this capstone was to determine the need for formal training specifically designed for academic advisors. The data collected from the interviews did show a need for advisor training that was greater than I originally thought. The managers interviewed responded with a commitment in providing access to their advisors to attend a training workshop if offered.

Two major culture shifts in advising were identified during this study. First, advising students began with only faculty advisors. Later, staff advisors began working with faculty as a team to support students on their educational journey. Second, an increase in the minimum degree qualifications for a staff advisor has evolved. Despite the increase in staff advisors' minimum qualifications, the data supported a need for multiple levels of advisor training because advisors are hired at different stages in their career from entry level to expert. Currently, there is no formal advisor specific training offered in the school where this study took place. Noteworthy differences were found in advising services offered by the departments, which supported the need for a training program.

All advisors interviewed reported a desire for more training. Several barriers to accessing training sessions related to advising were identified. Creating a training course for advisors and requiring that it be attended establishes advising as a core responsibility and provides clarity of the role for the advisor and their manager, faculty, and students. The core training topics advisors identified were categorized into three progressing levels that build on each other: Introduction, Foundational, and Professional Development. Formal required training eliminates barriers to staff accessing training necessary to offer a higher level of consistent quality of advising services throughout the school. The Staff Advisor Training Program to address those needs was designed and developed using the data collected from the advisors along with literature and my personal experiences (see Figure 1).

The Staff Advisor Training Program exposes advisors to academic coaching through a progression of three types of advising—prescriptive, developmental, and proactive—and creates a safe space for real-time advising practice. The training provides basic to advance fundamental knowledge advisors will need to grow professionally and to respond to the countless topics students seek assistance from the staff advisor. The training connects advisors to the appropriate networks to support their growth and expand their knowledge of services offered to the students at the university. Advisors can build their advising toolbox by participating in modules on self-awareness, design thinking, and academic coaching, recognizing “the ability of the counselor or academic advisor not only to recognize the need to change himself if he expects to keep in tune with students in a changing world but also to develop the sensitivity to perceive these self-changes as they occur” (Crookston, 2009, p. 78). Advisor training ensures that all advisors, no matter

where they are at in their career, receive the same foundational training to support the students they were called to serve. Finally, the training familiarizes advisors on how to use the university's asynchronous learning platform so they can take ownership for their ongoing learning needs.

Limitations and Future Research

The number of staff members that advise students has increased substantially over the past 2 decades and has created a more economical opportunity for training advisors. Still, staff continue to be hired at varying times throughout the year, making one annual offering of a training program fall short of meeting the needs of the hiring department. Dividing the training into three distinct levels addresses this challenge, in part, by allowing a particular level to be offered when the demand is greatest. However, this matter is an area for future research. Advisors throughout the university can be studied to see if an advisor training program could be created for use on a university-wide basis. If the training was made available to all advisors at the university, it would warrant being offered at more frequent intervals. Other areas for future research include studying how faculty are trained to advise students. Students could also be interviewed to determine their advising needs and if they are currently being met. Due to time constraints students were not interviewed for this study. Other research could examine the current staff onboarding process at the university level to see where improvements could be made.

In summary, I was able to take my passion for coaching and identify training and professional development needs of academic advisors in my school built on adult learning and coaching skills. It is my hope to continue my own professional development as I work with my colleagues to advance academic advising and service to our students.

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