Academic Advisor Performance Evaluation & Promotion Update for 2018-2019

HR Liaison Meeting
April 4, 2019
Objectives

• Brief overview for anyone new
• Review updates to form
• Review timeline
• Review criteria for eligibility for promotion
• Answer questions
Brief Overview

• Unique performance evaluation form = comprehensive excel workbook
• Self assessment worksheet in place of self appraisal form
• Ratings by job function in core values
Academic Advisor Performance Evaluation Workbook

**Job Summary**

<table>
<thead>
<tr>
<th>Academic Advisor I</th>
<th>Academic Advisor II</th>
<th>Academic Advisor III</th>
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</thead>
<tbody>
<tr>
<td>Under immediate supervision, advises students on course selection, requirements for selected areas of concentration &amp; post-college plans to help meet their educational needs &amp; realize student scholastic goals.</td>
<td>Under close supervision... This position typically demonstrates proficient &amp; comprehensive knowledge of defined skills areas &amp; applications. Develops &amp; oversees advising functions, applies specialized knowledge &amp; may serve as mentor/ trainer of new Advisors &amp; support staff.</td>
<td>Under minimal supervision... Serves as a team leader and may supervise other Advisors in the absence of or at the request of the direct supervisor, but serves as an actual Advisor the majority of the time.</td>
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</tbody>
</table>

**Essential Functions**

1. Advises students in matters related to goals, policies, choice of curriculum, course load, study habits, course scheduling, academic action and problem resolution.
2. Interprets University policies, procedures, and curriculum to students, faculty, and staff.
3. Works with others in order to provide students timely information on educational options and University policies.
4. Assists with student orientations.
5. Makes appropriate referrals.
6. Verifies, certifies, and/or completes appropriate student-related forms and processes.
7. Maintains student and advising records in accordance with State/Federal law and University regulations.
8. May clear students for graduation.
9. Maintains student data security.
10. Utilizes appropriate technology to support effective advising.
11. Actively involved in professional development opportunities at the campus level (at minimum)
12. Develops contacts with departments and faculty

**Job Duties 1 – 12 in Academic Advisor I description and:**

13. Participates in professional development program at the Regional or National level, or demonstrates leadership at the campus level.

**Job Duties 1 – 15 in Academic Advisor I & II descriptions and:**

14. Represents college and/or university-level advising projects.
15. Represents the academic unit through participation on intercollegiate committees, campus leadership, and/or teaching courses.

16. Develops goals and objectives for improvement of the advising unit in conjunction with direct supervision. Implements the plans for improvement of advising functions and models within the college.
17. Provides leadership for campus-wide advising projects.
18. Networks with other departments, colleges and the office of the Director of Advising to ensure a coordinated approach to advising and retention.

**Record Management Score (0-5, highest)**

- Score: 5
- Effective at all areas: 5
- Effective at some areas, not all: 4
- Effective at most areas, not all: 3
- Effective in some areas, not all: 2
- Effective at least some areas, not all: 1
- Not effective at all: 0

**Professional Impact Score (0-5, highest)**

- Score: 5
- Effective at all areas: 5
- Effective at some areas, not all: 4
- Effective at most areas, not all: 3
- Effective in some areas, not all: 2
- Effective at least some areas, not all: 1
- Not effective at all: 0

**Ed Req.**

- Four-year college degree

**Exp. Req.**

- 0 years
- 3 years (must be FT advising in Higher Ed)
- 5 years (must be FT advising in Higher Ed)

*Related and relevant graduate degree may substitute for two (2) years’ experience.*
Updates to Form

• Moved to campus-wide verbiage
### Employee Information
- **Employee Name:** Aubie Tiger  
- **Employee Banner ID:** 90212345
- **Current Job Title:** Advisor I, Academic  
- **Start Date in Current Title:** 1/20/2018
- **Supervisor’s Name:** Ruthie Spliers  
- **Supervisor’s Banner ID:** 90213654
- **Rating Period:** 2019  
- **Earliest Date of Promotional Consideration:** work w/ supervisor

### For each of the Job Functions (Advising, Record Management, Professional Impact), use the following 5 point scale:

1. unsatisfactory  
2. meets some expectations but not all  
3. meets all expectations  
4. exceeds expectations  
5. exceptional

#### I. Job Functions

<table>
<thead>
<tr>
<th>Function</th>
<th>Accountability</th>
<th>Communication Skills</th>
<th>Initiative and Adaptability</th>
<th>Inclusion</th>
<th>Professional Integrity</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advising</td>
<td>Unsatisfactory in all areas</td>
<td>Meets some expectations but not all</td>
<td>Meets expectations</td>
<td>Exceeds expectations</td>
<td>Exceptional in all areas</td>
<td>3.0</td>
</tr>
</tbody>
</table>

1. I, II, III Advises students in matters related to goals, policies, choice of curriculum, course load, study habits, course scheduling, academic action and problem resolution.
2. I, II, III Interprets University policies, procedures, and curriculum to students, faculty, and staff.
3. I, II, III Works with others in order to provide students timely information on educational options and University policies.
5. I, II, III Makes appropriate referrals.

#### Supervisor Comments

### Instructions
- Rubric
- 2018-19 Performance Evaluation
- 2018-19 Self Assessment
- 2019-20 Performance Evaluation
- 2019-20 Self Assessment
- 2020-21 Performance Evaluation
- 2020-21 Self Assessment
*Information copies from performance evaluation worksheet to self assessment worksheet for corresponding year (except highest degree)*

*more space to type*

*advisor completes separate excel sheet each year and emails it to supervisor, eliminates need to email workbook back and forth*
The Professional Development Plan is used by the supervisor to identify several areas:

1) Supervisors may use this section to list job duties necessary for improvement over the course of the next year. Supervisors should label these duties as "mandated."

2) Supervisors may also list job duties that will allow the advisor to demonstrate performance at the next level to support pursuit of promotion. These duties are labeled as "recommended."

3) Supervisors may use this section to list aspirational goals for the upcoming year, which will support pursuit of exceptional performance but are not essential to effective performance. These duties are labeled as "goal."

<table>
<thead>
<tr>
<th>Job Duty</th>
<th>Progress Needed</th>
<th>Action Plan</th>
<th>Mandated, Recommended, or Goal</th>
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<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Mandated</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>Recommended</td>
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<tr>
<td>3</td>
<td></td>
<td></td>
<td>Goal</td>
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<tr>
<td>4</td>
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☐ Indicate here with a check if this employee has a Performance Improvement Plan (PIP) on file.
### V. Signatures

#### Performance Review Approval Signatures

<table>
<thead>
<tr>
<th>Supervisor Signature</th>
<th>Date:</th>
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<th>Manager (Second Level Review) Signature</th>
<th>Date:</th>
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#### Performance Review Completed

<table>
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<th>Supervisor Signature</th>
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<th>Advisor Signature</th>
<th>Date:</th>
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This annual performance review will become part of your personnel file. Your signature above indicates that you and your supervisor discussed this document. Your signature above does not necessarily mean that you are in agreement with this performance review.

<table>
<thead>
<tr>
<th>HR Liaison Signature</th>
<th>Date:</th>
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June 1, 2018 — May 31, 2019

**March/April**
1. Update sessions for advisors;
2. Pay evaluator training in April for supervisors and HR Liaisons

**May**
1. Self assessments due to supervisor by **internal deadline**;
2. Supervisors complete performance evaluation sheets and submit to HR Liaisons for review

**May/June**
1. Performance evaluation meetings;
2. Supervisors submit promotion materials to HR Liaisons by **internal deadline**
   - Performance workbook
   - Current resume/vita
   - HR34-A
   - Pay evaluator w/ recommended salary
3. HR Liaisons submit promotion materials to Shelly Murray and Bailey Ward by **June 18**
   (college/school HR liaisons will set **internal deadlines** prior to this)

**July**
1. Performance evaluation meetings;
2. All remaining (non-promotion) performance evaluation workbooks due to HR Liaison by **internal deadline**
3. Performance evaluation campus wide due to HR by **July 19**

**October 1**
Promotions take effect

- Compensation will review and submits to Kerry Ransel by **June 25**
Who is eligible to promote to Academic Advisor II or III?

To be eligible to promote to **Academic Advisor II**, an advisor must have at **minimum**:

- 3 years’ experience with at least 2 years including full-time primary duties of advising in higher education
- A graduate degree may substitute for 2 years’ experience but does not override the requirement for 2 years full-time primary duties of advising in higher education
- **Evidence of consistent and effective advisor II activity while serving in current role, additional job duties at level II include**
  - Leadership role in on-campus professional development and/or participation in professional development at regional or national level
  - Facilitation of college and/or university level advising projects
  - Participation on university committees, caucus leadership, and/or teaching courses

To be eligible to promote to **Academic Advisor III**, an advisor must have at **minimum**:

- 5 years’ experience with at least 4 years including full-time primary duties of advising in higher education
- A graduate degree may substitute for 2 years’ experience but does not override the requirement for 4 years full-time primary duties of advising in higher education
- **Evidence of consistent and effective advisor III activity while serving in current role, additional job duties at level III include**
  - Development of goals and objectives for improvement of the advising unit in conjunction with direct supervisor; implementation of plans for improvement of advising functions and models within the college
  - Leadership for campus-wide advising projects
  - Networking with other departments and/or colleges and the Office of the Director of Advising to ensure a coordinated approach to advising and retention
Pay Evaluator Training

Items to be discussed:

• Brief pay evaluator training (for supervisors)
• Consistent criteria for pay evaluator for academic advising positions
• Consistent stance on relevant experience