Technology-Mediated Advising and Student Support: An Institutional Self-Assessment

This rubric aims to help community colleges and broad-access four-year colleges assess their work on technology-mediated advising and student support, sometimes referred to as Integrated Planning and Advising for Student Success (iPASS). This work involves moving from a model of advising focused on information provision or course registration to one in which advising is sustained, strategic, integrated, proactive, and personalized (SSIPP)[1]—in which students have a dedicated advisor who can connect them to a coherent, institution-wide network of services.

The rubric is rooted in two key assumptions: first, that this type of holistic support is most effective when it leverages technology to reach students in a meaningful way at scale; and second, that this approach cannot be fully realized unless it is ingrained in institutional structures and processes, individual behaviors, and the norms of campus culture.[2]

The rubric outlines the core components of technology-mediated advising and student support identified by CCRC's research, which are divided into two levels. *Applied organizational capacities* are elements of the institutional infrastructure into which technology-mediated advising and student support must be integrated for the work to be successful. *Solution-specific components* are practices individuals engage in to deliver technology-mediated advising and student support services.

How to Use This Rubric

Each component can be rated on a four-point scale ranging from emerging to exemplary. Institutions should use the rubric to benchmark their progress, revisiting it over time. The rubric is not intended to produce a raw score or to reduce progress to a single rating. By providing an overview of the many complex pieces of technology-mediated advising and student support, the rubric can help institutions identify which areas are strengths and which may be in need of improvement.

Who Should Use This Rubric?

The rubric will be most relevant for college staff directly involved in providing or overseeing advising and student support services, including the technology side of services. Depending on the institution, this may include a variety of departments in addition to academic advising—for example, institutional research, information technology (IT), the registrar's office, counseling, and other support services such as Federal TRIO Programs or veterans' services. The rubric can be used either individually or collaboratively (with multiple people working to complete the tool together, or with multiple people completing the tool individually and then discussing it to come to a consensus).

RATINGS

IMPLEMENTATION AND ADOPTION QUALITY

Emerging: Efforts to promote a SSIPP approach to student support are minimal.

Developing: SSIPP strategies are used partially, inconsistently, or intermittently.

Accomplished: SSIPP strategies are actively used by most stakeholders across the institution.

Exemplary: SSIPP strategies are institutionalized as routine ways of operating and are actively used at scale across the institution.

EVALUATING THE QUALITY OF TECHNOLOGY-MEDIATED ADVISING AND STUDENT SUPPORT: AN INSTITUTIONAL SELF-ASSESSMENT RUBRIC

Applied Organizational Capacities				
CATEGORY	**EMERGING**	**DEVELOPING**	**ACCOMPLISHED**	**EXEMPLARY**
Organizational Structures for Student Support	Organizational structures (e.g., institutional policies, funding priorities, job descriptions, technology infrastructure) largely restrict advising to course registration functions.	Organizational structures promote some efforts to provide advising and student support using SSIPP strategies but have not adopted the full approach. (For example, a college may assign students to advisors without incentivizing regular touchpoints.)	The majority of organizational structures are designed to facilitate a SSIPP approach to advising and student support.	All organizational structures are designed to facilitate a SSIPP approach to advising and student support.
Process Alignment Across Departments	Organizational processes (e.g., workflow guidelines, communication channels, and expectations) are largely set by individual departments. Some efforts at cross-departmental collaboration may be underway, but student experiences vary depending on where and when they access advising and student support services.	Organizational processes have been streamlined across advising and student support services departments to promote a SSIPP approach, but these services are largely disconnected from the rest of the institution.	Organizational processes have been streamlined across advising and student support services departments to promote a SSIPP approach that connects student support to most departments across the institution.	Organizational processes have been streamlined across the entire institution, so that all students receive advising and support using a SSIPP approach.
Advising and Student Support Leadership	Advising and student support leaders operate in functional silos. Leaders have different visions of advising and student support, and overall ownership for student support is unclear. Limited efforts have been made to engage end users (i.e., advisors, faculty, and students).	Advising and student support services are run by a multitiered leadership team representing a cross-section of departments, but leaders are not fully aligned in their vision or have not clarified who is ultimately accountable for advising quality. Leaders have sought surface-level engagement from end users.	Advising and student support services are run by a multitiered leadership team representing a cross-section of departments with a shared vision of the SSIPP approach and a clear accountability structure. End users are included in discussions but not given any leadership authority.	Advising and student support services are run by a multitiered leadership team representing a cross-section of departments with a shared vision of the SSIPP approach and a clear accountability structure. There is a deliberate effort to include and empower mid-level leaders and end users on the leadership team.
Vision of Benefits for Advising and Student Support	Advising and student support are primarily viewed as stand-alone functions, with little connection to larger goals for increasing student success.	A few key stakeholders view connecting advising to other services as essential to fostering an institution-wide approach to student success. Plans for actualizing this vision are unclear.	Most stakeholders across the college share a clear, actionable vision of using the SSIPP approach to make advising and student support part of an institution-wide student success effort.	All stakeholders across the college share a clear, actionable vision of using the SSIPP approach to make advising and student support part of an institution-wide student success effort.
Technology Integration	There have been limited efforts to integrate advising and student support technologies with other institutional systems.	Advising and student support technologies are integrated with some other institutional systems. Gaps in information flow have been identified.	Advising and student support technologies are integrated with most enterprise systems. Information flow is mostly consistent and complete.	Advising and student support technologies are integrated with all enterprise systems. Information flow is monitored for consistency and completeness.

Solution-Specific Components				
CATEGORY	**EMERGING**	**DEVELOPING**	**ACCOMPLISHED**	**EXEMPLARY**
Advisor/Student Engagement	Advising is primarily focused on information provision related to course registration and administrative tasks.	In addition to information provision, advising services incorporate opportunities for skill building in areas such as academic planning or study skills. Some advisors provide affective support by helping students connect to staff and faculty and to institutional activities (e.g., clubs, events).	In addition to information provision and skill building, advising services promote cognitive development.[3] It is standard practice for advisors to provide affective support by helping students connect to staff and faculty and to institutional activities.	All students receive advising services that incorporate information provision, skill building, cognitive development, and affective support. Students' feedback on advising is regularly sought out as a means of improving services.
Education Planning	Education planning primarily consists of course selection for the current or upcoming term.	Efforts are being made to emphasize the importance of creating a plan for an entire program or degree, but not all students have plans, or education plans are not linked to transfer and career plans. Technology for education planning is used inconsistently.	Technology is leveraged to ensure that all students have an education plan for their entire program or degree that is linked to transfer and career plans.	Technology is routinely used to facilitate education planning for an entire program or degree linked to students' transfer and career plans. Education plans are kept up to date, and advisors intervene if students go off-track.
Student Analytics for Risk Identification and Early Intervention	Limited efforts are made to use student analytics to proactively identify and intervene with students who present risk factors related to completion.	Analytics are used to identify students who present risk factors and inform them of available services, but students receive little personalized follow-up. The college invests minimal time in considering how to use student analytics responsibly and ethically.	Staff actively monitor student analytics to identify students who present risk factors, and follow up with them using protocols for responsible and ethical responses that are appropriate given the information contained in the data.	In addition to using student analytics to identify and follow up with students who present risk factors in a responsible and ethical manner, staff help students understand, critique, and act on the information contained in the data.
Institutional Analytics for Continuous Improvement	There is limited use of institutional data to promote continuous program improvement or assess impacts on student outcomes.	The institution collects data related to program quality and impacts on student outcomes, but only some stakeholders have access to it.	Stakeholders across the institution have access to data related to program quality and impacts on student outcomes, and regularly refer to the data to guide individual and/or departmental practice.	Personalized and actionable reports are regularly reviewed, updated, and used to inform individual interventions and institution-wide initiatives. Data show clear evidence of improved student outcomes.
Technology Use	Staff make minimal use of technologies related to three core functions of advising: education planning, counseling and coaching, and risk targeting and intervention. Many advising processes are manual or paper-based.	Some faculty, advisors, and other student services staff use advising and student support technologies inconsistently or intermittently. Technologies are used to support only one or two of the core advising functions.	Most faculty, advisors, and other student services staff routinely use technologies that support all three core advising functions.	Use of technologies that support all three core advising functions has been fully institutionalized as a necessary practice for all faculty, advisors, and other student services staff.
Staff/Faculty Professional Development	Limited professional development opportunities are offered related to advising, student support, and the use of associated technologies.	Professional development opportunities for student support primarily focus on administrative tasks or the use of specific technology functions.	Professional development opportunities for student support emphasize how a SSIPP approach changes the role of advisors and other support staff. Trainings address how technology can be used to enhance this type of support.	Professional development opportunities for student support emphasizing a SSIPP approach are offered routinely. Trainings are revised as the needs of advisors and other staff change.

Companion Piece

This rubric is a companion piece to CCRC's *Implementing Holistic Student Support: A Practitioner's Guide to Key Structures and Processes.*[4] While the practitioner's guide focuses on the specifics of designing and delivering advising and student support services, this rubric offers guidance on broader institutional structures and processes that support a holistic advising model. In addition, while the practitioner's guide is designed to help institutions identify which pieces of holistic student support are already in place and to make plans for implementing those that are not, this rubric is designed to allow institutions to assess how well they are doing in providing holistic student support. Together, these tools offer a comprehensive blueprint for redesigning advising and student support.

Endnotes

1. Kalamkarian, Karp, & Ganga (2017).
2. Karp, Kalamkarian, Klempin, & Fletcher (2016).
3. In the context of advising college students, promoting cognitive development involves activities such as helping students think critically about how to link their education plans to a career path. See Martin (2007).
4. Kalamkarian (2017).

Sources

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