

San Diego State University



SDSU College of Business Administration

Business Advising Center

An Advising Center Implementation of Advisortrac – A Change Process



D. A. Graham, Ombudsman Princeton University

- The Ombudsman assists in the resolution of problems and act as liaisons between students, faculty and administrators.
- Guides students, faculty and staff with a complaint through normal and/or official channels for redress and acts as a mediator in the resolution of conflict.
- Conducts investigations with tact, diplomacy and discretion, respecting the individual's right to privacy and protecting the individual against retribution.
- **Background:**
 - Former Ombudsman San Diego State University
 - Adjunct Faculty/Lecturer
 - Doctoral Candidate

An Advising Center Implementation of Advisortrac – A Change Process



Sandra Williams, Assistant Dean, Student Affairs & Director, BAC -
Academic & Student Affairs – Roles:

- Supervision & Leadership of Business Advising Center
- Point of contact for students in crisis
- Management of yield events for UG programs
- Route of appeal (SDSU Senate Policy File)
- CBA Scholarship Liaison
- Co-Advisor, Business Student Council
- Background – Academic & Student Affairs
 - Schools and Colleges of Business
 - Academic Advising
 - Career Services

SDSU Business Advising Center



- **Functions & Services**

- Academic Advising for UG Business Students

- ✦ Pre Majors and Upper Division Majors – Fallo9 ~4,744
- ✦ 07-08 – 9,280 Student contacts
- ✦ 08-09 – 9,770 Student contacts
 - PreMajors
 - Majors
 - Families
 - Prospective Students

- Advising for Associated Business Student Council

- Commencement Coordination G & UG

- ✦ 07-08 – 1,650 Graduates
- ✦ 08-09 – 1,734 Eligible

- New Student & Parent Programs

- Transfer Readiness Programs

Business Advising Center

Undergraduate Program Director,
CBA

Associate Vice President, Student Life
& Leadership

CBA Assistant Dean for
Student Affairs, and
Director, Business Advising
Center

Director, SA

Peer Adv.
Coord./
Academic
Advisor

Admin.
Assist.

Retention
Coordinator/
Academic
Advisor

Commencement
Coordinator/
Academic
Advisor

Peer Advisors

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Change Process

January 2006 – May 2007

- **New Assistant Dean**

- ✦ **Professional Standards/Values – NACADA, CAS, NASPA, AACSB**
- ✦ **Review of the BAC Mission**
- ✦ **Review of procedures & process within BAC**
 - **Implementation of Sign In Advising process**
 - **Discussion of Electronic Databases**
- ✦ **Establishment of staffing & retreat calendars**
- ✦ **Identification of Facilitator for retreat events**

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Change Process

January 2006 – May 2007

- **Spring 2006 Retreat**
 - ✦ **Team Building**
 - ✦ **Personality Assessment - DISC**
 - ✦ **Review of the BAC Mission**
 - ✦ **Development of BAC Vision & Values**
 - ✦ **Promising Practices**
 - **Increased Communication in BAC**

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Change Process

January 2006 – May 2007

○ **Spring 2006 Retreat Outcomes**

- ✦ **Shared Vision of the BAC**
- ✦ **Provide accurate and friendly services**
- ✦ **Encourage academic success**
- ✦ **Model professional, courteous and ethical behavior**
- ✦ **Collaborate effectively and efficiently**
- ✦ **Empower student responsibility and accountability for learning**
- ✦ **Support life-long learning**
- ✦ **Create advising partnerships with students**
- ✦ **Make effective referrals**
- ✦ **Reflect the shared vision of the university and the college**

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Change Process

January 2006 – May 2007

○ **Spring 2006 Retreat Outcomes**

- ✦ **BAC Values**
- ✦ **Personal Integrity**
- ✦ **Mutual Respect**
- ✦ **Comraderie**
- ✦ **Mutual Support**
- ✦ **Diversity**
- ✦ **Upward feedback**
- ✦ **Learning**
- ✦ **Open Communication**
- ✦ **Student Leadership**
- ✦ **Global Citizenship**

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Change Process

January 2006 – May 2007

○ **Spring 2006 Retreat Outcomes**

- ✦ **Promising Practices**
- ✦ **Be willing to discuss problems, concerns and issues**
- ✦ **Lend a helping hand to one another**
- ✦ **Collaborate**
- ✦ **Empathize**
- ✦ **Listen**
- ✦ **Have fun together**
- ✦ **Focus on the positive**

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Change Process – SWOT Analysis – Advisortrac Implementation

○ Strengths

- ✦ Strong group of advisors who care about students
- ✦ Management very supportive and willing to work with poor performers
- ✦ Culturally diverse group of advisors who understand student needs
- ✦ Willingness to try new approach
- ✦ Good professional behavior

○ Weaknesses

- ✦ Challenge to overcome differences among advisors and management
- ✦ New advisors do not know when or who to turn to for assistance
- ✦ Lack of motivation
- ✦ Lack of consistent training on values and teambuilding

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Change Process – SWOT Analysis

○ Opportunities

- ✦ **New way of doing business will make office more efficient and effective**
- ✦ **Use of new technology**
- ✦ **Better Customer (student) Feedback**
- ✦ **Manage the flow of students**

○ Threats

- ✦ **Lack of college support will make it difficult to maintain program**
- ✦ **Internal IT personnel not happy with managing a database**
- ✦ **May not get external IT support**

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Fall 2006 Activities & Staffing

- ✦ **Review ideas/brainstorming for database**
 - Excel
 - Access
 - Proprietary software
- ✦ **Explore processes/products on campus**
- ✦ **Set team visits to other units**
 - EOP
- ✦ **Explore Options to share systems**
- ✦ **Discuss and evaluate at staffing**
- ✦ **Vendor Selection**
- ✦ **Conference call with the vendor**
- ✦ **IT staff collaborations –**
 - Database management (populating fields)
 - System access & security

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Change Process

January 2006 – May 2007

- **Fall 2006 Retreat & Staff Development**
 - ✦ **Setting the Preferences for Advisortrac**
 - ✦ **Opportunities for input from all BAC staff members**
 - ✦ **Expectations for use of system**
 - ✦ **Impact on BAC processes and services**
 - ✦ **Timeline for evaluation of Advisortrac**
 - **Input for change and adjustment**
 - **New processes/products – integrate database**

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TIME Performance Clock Model¹

- ✦ **T – Training**
 - Provide knowledge, skills & abilities
- ✦ **I – Incentives &**
- ✦ **M – Motivation**
 - Intrinsic and Extrinsic factors & impact on willingness to perform
- ✦ **E – Environment**
 - Extrinsic environmental factors
- ✦ **Frame – Performance clock frame**
 - Cultural environment & relationship of work, worker and workplace

BAC Interventions



- **Hiring**
 - ✦ **Introduction of use of database in BAC**
- **Incentives**
 - ✦ **Incentives related to Advisortrac outputs**
- **Consequences**
 - ✦ **Reasonable performance standards/Advisortrac**
- **Support**
 - ✦ **Increased support/feedback to advisors**
- **Environment**
 - ✦ **Create coaching environment within BAC**
- **Training**
 - ✦ **Regular in-service using college, campus and professional resources**
- **Communication**

BAC Advisortrac Uses



- **Checking Students in for Advising Contact**
 - ✦ **Walk-in and Appointment**
- **Comprehensive record of student contact with BAC**
- **Payroll for Peer Advisors**
- **Program Management**
 - ✦ **Students on Probation**
 - ✦ **Transfer students**
 - ✦ **Study Abroad Sessions**
- **Data for assessment of student use of BAC services**

[Support](#)
[Exit](#)

- [Search](#)
- [Create](#)
- [Log Listing](#)
- [Reports](#)
- [Log Resource](#)

Welcome to AdvisorTrac!

Please choose an option on the left.

Center	Appt/Visits Since 7/1/2009	Appt/Visits Today	Current Students
Total:	0 / 0	0 / 0	0
There were 0 appointments scheduled since 7/1/2009 and 0 scheduled today.			

To...

Standard Reports

Please choose one of the following standard reports and then click generate report.

Select a category:
Schedules

Select a report:
Advising Center Schedule
Schedule: Advisors by Date
Schedule: Dates by Advisor
Appointments: Advisors/Students
Appointments by Status
Center Coverage
Appointments by Date Scheduled
Export Raw Appointment Data

From: To: Generate Report

- Summarized
- Use Previous List of Records
- Show Visit Info

References

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Questions?



SAN DIEGO STATE
UNIVERSITY

Undergraduate Business Advising Center

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