Engaging Students at a Distance

Academic advising is one of the most effective ways to increase student success.[1] In this time of worldwide crisis, campuses have a unique opportunity to support students at a distance through virtual advising appointments. Now, more than ever, it's important that advisors demonstrate the NACADA core values of the academic advising profession: caring, commitment, empowerment, inclusivity, integrity, professionalism, and respect.[2]

Toward that goal, this document describes:

- Tips for actions before, during, and after advising a student at a distance
- A checklist to use for planning and implementing successful virtual advising appointments

Schedule an Appointment: Use Personalized and Clear Communications

Be intentional with outreach when setting up appointments.

As virtual communications are increasing from all quarters of our lives, it will be increasingly important to engage students in ways that respect their time and attention. Before connecting with an individual student, review the student's record in Inspire, Inspire for Advisors, and/or your SIS to personalize your communications and suggest topics for your meeting. When you offer a virtual advising appointment, use language that is encouraging, positive, and lets the student know that you and your colleagues care.

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[1] Civitas Learning, Inc. (2020). What really works: A review of student success initiatives. https://media.civitaslearning.com/wp-content/uploads/sites/3/2020/02/Civitas_Learning_What_Really_Works_Report.pdf.

[2] NACADA: The Global Community for Academic Advising. (2017). NACADA core values of academic advising. https://nacada.ksu.edu/Resources/Pillars/CoreValues.aspx.

Offer a choice of communication modalities.

If you're able to hold virtual appointments by a variety of modalities (video, telephone, etc.), invite students to select the option they prefer. Be sure the student understands the communication modalities offered—you might propose, for example, "a video call with Zoom, where we can see each other on our computers or phones."

Communicate meeting logistics and expectations.

After you and a student agree to a virtual appointment, send an email outlining:

- The date, time, and duration of the appointment
- Instructions for using the technology, if appropriate, and links to support resources, if available
- What the student can expect from the meeting—your agenda, goals, and expected outcomes
- What the student should bring to the meeting (questions, concerns, topics to discuss)

Before the Appointment: Get Prepared

Review policies, services, and at-distance resources.

Make sure that you're current on institutional policies, especially those that have recently changed, so that you can share them with the student. Be prepared to share an up-to-date list of services and resources available at a distance—both usual advising resources and special resources should the student need help outside the scope of the advising relationship.

Review the student's record.

Allow yourself time before the appointment to review information from the student's academic records and advising notes so you can understand the student's educational goals and progress toward them. If you're using Inspire, review the prediction score, engagement opportunities, previous notes and appointments, student details, and course history and engagement in the LMS. If you're using Inspire for Advisors, review the student details page, the prediction score and any shift in it, the inspiration and intervention factors, course history, and outreach history.

Pay special attention to signals that may inform the type of support the student will need, including indicators related to the transition to only online learning:

- Is the student at greater risk of not enrolling (less likely to persist)?
- Have faculty members raised alerts regarding the student?

- Is the student at a transition point—for example, new to a program or the institution, transitioning from general to major coursework, or nearing graduation?
- What services and support has the student used previously, and how are they being made available at a distance?
- What were the purposes and outcomes of recent advising appointments?
- Is the student being required to use unfamiliar learning processes or technologies?
- If the institution's virtual learning is happening in the LMS, is the student logging in as expected? Are there particular courses in which the student's login behavior varies greatly from peers?
- Has the student lost educational opportunities due to COVID-19 (such as a lab course or a study abroad or internship program) that need to be replaced with current offerings?

Provide a professional environment for the student and yourself.

Prepare for the appointment:

- Set up your workspace for the call.
- If the appointment will use video, make sure that your appearance and environment create an appropriate impression.
- Turn off notifications on your computer and limit other distractions.
- Open the programs and documents on your computer that you need; have paper and a pen nearby.
- Put yourself in a warm, calm, and open-hearted frame of mind.

During the Appointment: Build a Relationship and Momentum toward the Student's Goals

Connect with a smile.

Your tone sets the mood for the interaction, and a cheerful greeting will both help frame the call as a positive experience and set the student's mind at ease as the appointment begins. Acknowledge, but don't dwell on, the uncertainties of the moment. Focus on the future, with positive messaging about the student's educational goals and how you and your institution intend to continue to support them.

Begin with conversational interaction.

Use information from your records' review to start the conversation, asking open-ended questions about the student's courses, major, interests, or goals. For example, "Sarah, I see that you're taking Intro to Psychology. That course was the reason I became a Psychology major. What do you like most about it?"

Practice active listening.

Focus on being present, listening with intent, and working to understand the needs of the student. Remember to:

- Listen carefully to questions.
- Ask for clarification as necessary.
- Restate to show understanding.
- Avoid close-ended questions.

Be patient with—and don't step on—awkward silences; it may take a few minutes for the student to be comfortable enough to speak freely. Wait until the student has completed a thought before you jump back into the conversation.

Communicate as you shift between tasks.

A student will know if you are multitasking and will feel unseen if you are distracted. When you're working on a support task for the student, such as searching for information or taking notes about the conversation, be clear that that's what you're doing. For example, say, "Give me a moment while I look that up. OK, I'm back." Or "Let me write that down so I remember to find that out for you."

Connect the student with services and resources.

Although registration advising for the next term may be top of mind for the student, take the opportunity to use this interaction to provide holistic support—to show that you're there to help, and that the student matters to the institution. Be prepared to connect the student to available virtual services and resources specific to the need, such as tutoring, financial aid contacts, and technology support.

Understand when to refer to outside resources.

Caring for students is a community effort. Sometimes a student will disclose concerns outside the scope of the advising relationship (for example, financial hardship, domestic issues, or Title IX concerns) that signal that the student needs non-academic services.

In such a case, express empathy and provide immediate assistance. Don't try to address such a problem yourself. Instead, say something like, "Thank you for sharing that with me. I want to help you get the appropriate resources to help—let's set an appointment with you and a staff member in *X* office."

Provide a warm conclusion.

Ask the student for other questions or concerns. When there are none, recap action items: next steps for the student and actions you will take as a follow up. Let the student know that you're available for additional meetings, and remind the student to respond to your future outreach.

After The Appointment: Documentation and Next Steps

Record detailed advising notes.

Accurate advising notes will be helpful to you and others as your institution continues to support the student through future interactions. If you have provided the student with referrals, make sure to note them in Inspire or Inspire for Advisors, being mindful of the student's privacy and FERPA guidelines.

Follow up with an invitation to connect again. Send a follow-up email that:
- Refers warmly to the interaction
- Summarizes the meeting
- Restates next steps you and the student will take
- Emphasizes your email address and/or the telephone number you'll use if you call
- Reminds the student to open all emails sent by you and others at your institution

Escalate concerns.

If the virtual appointment has resulted in any concerns, report them to your supervisor.

Complete and document follow-up items.

Make sure to add to your list any to-do items that result from the appointment, then add an advising note when they are completed. If appropriate, let the student know when you've followed up on your commitment.

Take a break.

Take some time to decompress after each virtual appointment.

Virtual Advising Appointment Checklist

Use this checklist to structure appointments to help meet students' advising needs at a distance.

Schedule an appointment:

- ❏ Review the student's information in Inspire, Inspire for Advisors, and/or your SIS.
- ❏ Email the student to offer a virtual appointment.
    - ❏ Respect the student's time and attention.
    - ❏ Use encouraging, positive language.
    - ❏ Offer and describe options for communication modalities.
    - ❏ Suggest meeting topics and goals.
- ❏ Send an email outlining:
    - ❏ The date, time, and duration of the appointment
    - ❏ Instructions and support for using the agreed-upon technology
    - ❏ What the student can expect from the meeting—agenda, goals, expected outcomes
    - ❏ That the student should prepare questions, concerns, and topics to discuss

Before the appointment:

- ❏ Review your institution's policies, services, and at-distance resources.
- ❏ Review the student's academic record. Note potential needs for support:
    - ❏ Is the student at greater risk of not enrolling (less likely to persist)?
    - ❏ Have faculty members raised alerts regarding the student?
    - ❏ Is the student at a transition point—new to a program or the institution, transitioning from general to major coursework, or nearing graduation?
    - ❏ What services and support has the student used previously, and how are they being made available at a distance?
    - ❏ What were the purposes and outcomes of recent advising appointments?
    - ❏ Is the student being required to use unfamiliar learning processes or technologies?
    - ❏ If the institution's virtual learning is happening in the LMS, is the student logging in as expected?
    - ❏ Has the student lost educational opportunities due to COVID-19 that need to be replaced with current offerings?
- ❏ Prepare for the appointment:
    - ❏ Set up your workspace for the call.
    - ❏ If the appointment uses video, make sure that your appearance and environment create an appropriate impression.
    - ❏ Turn off notifications on your computer and limit other distractions.
    - ❏ Open the programs and documents you will need; have paper and a pen nearby.
    - ❏ Put yourself in a warm, calm, and open-hearted frame of mind.

During the appointment:

- ❏ Connect with a smile and a cheerful greeting.
- ❏ Use the information you learned about the student to begin the conversation with open-ended questions about the student's courses, major, interests, or goals.
- ❏ Practice active listening:
    - ❏ Listen carefully to questions.
    - ❏ Ask for clarification as necessary.
    - ❏ Restate to show understanding
    - ❏ Avoid close-ended questions.
    - ❏ Be patient with—and don't step on—awkward silences.
    - ❏ Don't multitask.
    - ❏ Communicate as you shift between tasks to avoid the impression of distraction.
- ❏ Use what you've learned about the student's needs to:
    - ❏ Suggest virtual services and resources.
    - ❏ Set up referrals to outside resources.
- ❏ Provide a warm conclusion:
    - ❏ Ask the student for other questions or concerns.
    - ❏ Recap the student's next steps and your action items.
    - ❏ Let the student know you're available for future meetings.
    - ❏ Remind the student to open email from you and your colleagues at the institution.

After the appointment:

- ❏ Record detailed advising notes.
- ❏ Send a follow-up email that:
    - ❏ Refers warmly to the interaction
    - ❏ Summarizes the content of the meeting
    - ❏ Restates next steps for each participant
    - ❏ Emphasizes your email address and/or telephone number
    - ❏ Reminds the student to open email from your institution, and especially from you
- ❏ Escalate any concerns to your supervisor.
- ❏ Complete any follow-up items.
    - ❏ Document your actions with an advising note.
    - ❏ Communicate the outcome to the student, if needed.
- ❏ Take a break.