Organizing a Successful Virtual Advising Team

In this challenging time, higher education advisors and other student success professionals are undergoing rapid changes in their lives and work, while at the same time supporting students experiencing similar disruptions. Your leadership, care, compassion, and empathy are more important than ever—and will become even more crucial in the coming weeks.

As you shift to managing teams and team members who are both working remotely and supporting students engaged in virtual learning, focus some of your efforts on creating new team processes, ensuring effective communications, providing staff the information they need, and supporting staff in their new work and life routines.

Create New Team Processes

Make sure that all the necessary technology is in place.

After you've provided your teams with the technology they need to perform their jobs, some staff may still have technical barriers to doing their work. For example, does anyone lack appropriate internet connections and phone service? If so, leverage your senior leadership to find solutions and allocate resources, many of which may be newly available.

Create a team structure with both shared accountability and flexibility.

Set expectations about how team members should spend their time. Clearly define job roles, daily and weekly schedules, expectations for response time to students, and how team members should take breaks and communicate about them. Remember that you will need to demonstrate flexibility and compassion during this crisis, understanding that members of your teams will need to attend both to their work and to their new family and home obligations.

Have a plan in place to provide support and alternatives to work schedules for team members who will need to take time off to care for family members or for personal illness. Be prepared to communicate last-minute changes in responsibilities to team members and the students they serve while maintaining staff members' privacy.

Translate and communicate institutional policies for the new work environment.

Communicating decisions from institutional leadership is always important—and is even more so now—so create a cadence and standard forum for sharing that information with team members. Remind your team about your institution's existing policies concerning student privacy and data sharing. General FERPA guidelines are still in effect—how will team members protect student information from their homes? Provide guidelines, updated training, and best practices.

Continue to engage with students professionally.

Encourage your team members to hold video appointments with students. Remind them to dress as if at work and to set up appropriate visual environments to maintain a professional tone.

Allocate your most valuable resources—your staff members' time— to the students with the greatest need.

Work with your team members to determine criteria for reaching out to students during the remainder of the term. For example, you may want to prioritize, and create specific communications for, students who are logging into the virtual learning environment less often than expected, were previously learning entirely on campus, have low persistence prediction scores, and/or are at a specific stage in their educational careers (such as first-year students or students nearing graduation).

Ensure Effective Communications

Hold effective virtual meetings.

Set weekly virtual meetings in which your team members connect remotely, and by video. Use resources such as Microsoft Teams, Zoom, or Google Hangouts Meet, some of which may be available without cost during this time. Teach your team to use the resources of those platforms to participate in the meetings. For example, if you have a large team, you can use polls and the "raise hand" functionality to foster team bonding and communications.

Think about setting a daily "check in," a quick, 15-minute remote meeting at the start of each day. Use this meeting to communicate important updates from leadership, to identify needs and opportunities for team work, and to gauge the morale of your team.

Create opportunities for sharing and support—and improve your work in the process.

Set aside time in your longer meetings to invite your team members to share the experiences and challenges they encounter as they support students learning at a distance. Identify possible gaps in services, understanding, policies, or processes. Discuss how to maintain boundaries with students while using referral networks and more to support needs that fall outside team members' assigned roles and responsibilities.

Encourage informal team building.

Be intentional about creating a virtual environment in which the valuable "drive by" conversations that formerly happened spontaneously in your workspace (or hallway) continue to occur. Encourage your team to use internal messaging systems (such as Messenger, Slack, or similar) to check in, support one another, and communicate about changes in availability throughout the day.

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Create smaller "teams" within your group to increase connection while at a distance. Encourage team staff members to schedule "virtual coffees" or lunches. Consider formally pairing individuals as "partners" so that everyone has someone to chat with about questions. You might even use this crisis to pair team members without existing relationships to create virtual opportunities for them to get to know one another and expand their professional networks.

Provide Team Members With Essential Information

Create systems to document and share changes in services and processes.

Advisors will need to be able to share up-to-date information with students on the services and support available, especially specific information about how students can access services at a distance. A quick but effective way to do this is to create a master list of student services, make it available to advisors and others on the student services team, and update the list as service modalities and offerings evolve. After you have created the list, you can use it to prioritize the transition of student services to digital or virtual access, if needed, and to draft communications to students or update websites and documents regarding new processes for access to services.

Use the Civitas Learning Digital Services Inventory.

If you choose to make a master list of student services, you can use the Civitas Learning® Digital Services Inventory to develop it. Instructions, and survey and spreadsheet templates, are available in the Civitas Learning Hub or from your Customer Success Manager.

Brainstorm resources available to students and add them to the spreadsheet. Share the spreadsheet and ask services' leaders to add information to it about programs and access. You can also use a survey to gather information (and if the survey contains the same questions in the same order as the columns in your spreadsheet, you can easily export the survey results to add them to the spreadsheet). By sharing the resulting spreadsheet with your advising team, you can ensure that they'll always have the information they need about services to support students.

Support Team Members' Work & Lives

Engage the broader institutional community in student services work.

Support faculty members' communications with students about services by providing them with reliable information—maybe even a PowerPoint slide or two—that they can use in their courses and other communications with students. Ask your leadership to send quick messages or join a meeting for a moment to thank your team for its work.

Pay attention to the stress of change.

As members of your team go through their own challenges, navigating the additional struggles that students present may increase their concerns. Provide resources for your staff to use to help with this transition. If individuals are struggling with anxiety or fear, encourage them to use resources through your institution's EAP (Employee Assistance Program) or health insurance provider.

Keep the momentum going.

Reiterate and reinforce your team's critical role in student success. Find a way to celebrate the work that they do with their students, and help them celebrate student milestones as well. If your institution's commencement ceremony has been canceled or postponed, for example, brainstorm how your advisors can support graduating students and celebrate their work together during their academic careers. Continue with awards and recognition programs for your team, and consider creating new opportunities to recognize collaboration or new skills and ideas gained by the team.