Success@UMass
Advisor Development Series
Writing Advising Appt Reports
Success@UMass Advisor Development Series
Spring 2018
Overview

• Introductions
• Discussion: What gets documented?
• Guidelines for Advising Appointment Reports
• Activity & Discussion
• A New Approach: Collaborative Note Taking
• Questions
Introductions

• Name
• Department
• Position
• Types of interactions you document
Discussion

What does (or should) get documented in writing related to student interactions?
Guidelines – See Resource Document

• **Resource:** Guide to – Writing Advising Appt Reports
• Review of Suggestions
• Topic based examples
• What’s missing?
A New Approach: Collaborative Note Taking

• What are the intended outcomes an advising appointment?

• Ultimately, we want students to…
  – Remember what we discussed
  – Take actions as agreed up
  – Feel encouraged & empowered to complete actions
  – Have ownership over their educational experience and process
Collaborative Note Taking

SHH...

It’s A Secret!

Except it’s not
A New Approach: Collaborative Note Taking

If we ultimately want students to...

- Remember what we discussed
- Take actions as agreed up
- Feel encouraged & empowered to complete actions
- Have ownership over their educational experience and process

...Then let’s change the way to document our interactions.
Collaborative Note Taking

• A process of asking the student to be engaged in the note taking process.

• Provides an opportunity for the student to share input and perspectives on the advising experience as well as their progress.

• Creates more responsibility for the student to take ownership in the advising process

• Allows for transparency

• Develops a stronger sense of trust in advisors and the process
Putting it into Practice: Collaborative Note Taking

• Option 1: Give the student a key board and ask them to type a summary

• Option 2**: Advisor: I’d like to write a few notes about what we talked about today. Will you please summarize what we’ve talked about and your next steps? I’ll type while you talk.

• Review what’s been shared/written

• Ask for details

• Identify anything left out (i.e. items needing further clarification)
Benefits: Collaborative Note Taking

• Student-Centered approach to advising

• Studies have shown, collaborative note taking…
  – Can improve engagement and involvement
  – Focus on change and positive outcomes
  – Improve compliance
  – Save time

• For the student, it’s empowering

• For the advisor, it’s provides a ‘check for understanding’ measure that productively uses appointment time.
Sources
