

*Revised draft document prepared May 2015 by Jim Elliott and Stuart Martin*

*At the ANZSSA conference held in Wellington in December 2013, a discussion was launched with the objective of developing quality standards for student advisors in post-secondary educational institutions. There was ongoing consultation throughout 2014 and further discussion at the combined ISANA and ANZSSA Conference held in Adelaide in December 2014.*

*The draft Standards Document below derives from this consultative process.*

In recent years, there has been some growth in the number of staff in post-secondary educational settings with a significant component of student advisory work in their role. In many cases, this has involved the use of the words “Student Advisor” (or “Adviser” – either spelling of the term is acceptable) in job titles in many varied settings, such as generalist positions as well as in Student Engagement/Student Services/Support settings. There are also a wide variety of positions which have an advisory role, but do not use the term “advisor” in the position title. The growth in the numbers of positions falls mainly in the following main categories:

1. Student Welfare/Student Wellbeing Advisors/ Student Financial Advisors related roles;
2. Student Housing Advisors;
3. Student Advocacy/Advisor related roles; and
4. Student Disability Advisor related roles.

What sets these roles from other student-facing positions in our sector is that that they provide a *transformational* function as distinct to a *transactional* function for the others more administration related roles found in the Higher Education sector.

We also note that there are professional roles in post-secondary education which are not covered by these standards. In particular, there are existing and differing standards for Academic Language and Learning Educators (who tend to avoid using the term “advisor” in position titles) and for staff in Careers Services.

The National Academic Advising Association (NACADA) has compiled several definitions that are helpful (see <http://www.nacada.ksu.edu/Resources/Clearinghouse/View-Articles/The-definition-of-academic-advising.aspx>, document undated). The Council for the Advancement of Standards in Higher Education (2013) has also developed standards for academic advising (<http://www.cas.edu/getpdf.cfm?PDF=E864D2C4-D655-8F74-2E647CDECD29B7D0>)

Whilst the these documents and definitions pertain specifically to academic advisors within the North American context, many of the broad principles are applicable more widely to advising in general and to the Australian and New Zealand region.

The concept of transactional advice is relevant to roles and circumstances where a student is seeking information or to complete a relatively straightforward action. The contact with a staff

member will likely occur through a customer communication channel such as a service desk, phone, email or other electronic channel. The contact may be brief, one-off, and there is no real on-going relationship between the student and staff member. These contacts are critical to institutional operations as they are often the first contact point for students whose needs are at a deeper level than transactional. Staff in customer contact roles must meet significant customer service standards.

Transformational advice typically involves a greater depth in the relationship between the staff member and the student. The issues may be complex, and require on-going advice and support over a period of time. Whilst these roles also require high quality customer service standards, there are greater expectations for advisor roles. Staff may be in roles that address both transactional and transformational aspect of student advising.

It is also important to acknowledge that many advisors have important functions which do not necessarily involve direct student contact. These may include proactive awareness raising activities, programs which seek to prevent problems arising, and project management.

The size of the institution where advisors work has some significant impact on the attributes of their role. In larger institutions with more advisory staff, it is often possible for advisors to become somewhat specialist in particular areas of service. In smaller or more isolated settings, advisors may face pressure to become a “jack-of-all-trades”.

Key attributes should generally include the following:

- Expertise in one or more specific areas of knowledge, such as student development, financial aid, residential colleges, International student issues, student wellbeing etc.;
- A wide knowledge of the post-secondary educational context, and the staff member’s own institution in particular;
- Capacity to develop a dynamic and collaborative working relationship with students;
- Focus on student development with respect to effective decision-making and problem-solving;
- Intentional empowerment of students to take responsibility to achieve their goals and to become informed consumers of their own education;
- An understanding of student development in general with respect to;
  - intellectual growth,
  - leadership,
  - independence,
  - career path,
  - interpersonal relationship,
  - academic success,
  - social responsibility, and
  - appreciating diversity.

With the above context in mind, it is recommended that the standards below should be applicable to Student Advisory roles.

### **1. The role of all staff**

Any staff member at an institution may be approached by a student with a query. In a very broad sense, institutions must therefore accept that all staff may be placed in a *de facto* advisory role when not necessarily formally employed as such. There should be clear information available to all staff so that they may quickly refer a student to the most appropriate source expertise to address their situation.

It is recommended that:

- Induction information provided to all staff includes reference to an expectation that students seeking advice should be referred to the most appropriate advisory service.
- It is desirable that there should be a clearly identified point of referral for such queries, depending on the model of service adopted by the institution. This is particularly the case for larger institutions

where there may be multiple services. In the case of large complex institutions, it may be difficult for staff (and especially casual staff) to be aware of the range of services available.

## **2. Clear Position Descriptors addressing expected competencies**

Position descriptions for Student Advisors should clearly demonstrate the transformational and interactive nature of the service the institution expects to be provided to students. Examples of such descriptors may include expectations that Advisors may:

- Provide a confidential welfare, advisory and referral service to all enrolled students on a range of issues relating to student progress and personal wellbeing;
- Act as a first point of contact by a range of channels for any current student wanting advice/information/assistance with any aspect of university life;
- Provide a timely assessment/ triage and active, direct referral service for students to access appropriate student support services;
- Participate in, co-ordinate or facilitate case management as necessary;
- Follow up referrals regarding action and outcome and record all action and contracts within the appropriate service record system;
- Advise students on complaint and grievance processes and other institutional processes and assist them in these services. Students should be made aware that complaint and grievance processes are in accordance with the appropriate national compliance standards in Australia and New Zealand;
- Develop and maintain effective relationships and networks with service providers (internal and external and liaise effectively across the institution with all relevant staff);
- Develop outreach programs which inform staff understanding and knowledge of these services;
- Make recommendations to other operational areas in matters related to student advisory services;
- Contribute to the ongoing development and improvement of best practice models associated with the management of student risk;
- Maintain up to date knowledge in any specialist field related to the particular advisor role to which the individual has been appointed; and
- Have the capacity to work with a diverse student, staff and community population.

## **3. Minimum recommended qualification standards**

It is recommended that advisors should have a minimum completed qualification at an equivalent standard to the level of course being undertaken by entry level students at their institution, or significant experience in the field. However, it is acknowledged that advisors may have entered their position from a very broad range of former positions external to the post-secondary education environment and that the nature of this previous experience should be valued.

## **4. Recommended professional development and supervision**

Because advisors are not employed in a formally registered or accredited profession, it is important that they are provided with appropriate professional development and supervision. To address this:

- The line manager of advisors should be an individual with significant experience in human services (such as welfare, community development and health), and accessible to advisors to provide guidance.
- Notwithstanding the previous point, it is acknowledged that there will be circumstances where the line manager may not necessarily have those attributes. In such cases. It is important that the advisor have access to other sources of guidance.
- The line manager's supervisory role should ensure advisors are responsible for their own professional conduct and do not act beyond their field of expertise.
- The line manager should regularly review case records to ensure that advising notes adhere to standards of quality, practice and privacy as outlined in each institutions policies and procedures.
- Advisors should have access to counselling services for specialist guidance and the opportunity to debrief, particularly in cases involving significant mental health risk.

- Advisors should have access to an appropriate training and professional development schedule developed in collaboration with their line manager, in order to keep their knowledge and practice relevant and current. This may include appropriate induction, short courses, in-house training, local conferences, national conferences and the like.
- Advisors should be encouraged to network with relevant national and international professional associations.
- Where advisors are effectively “lone practitioners” in smaller or isolated settings, it is especially incumbent upon line managers to ensure access to appropriate professional development and supervision.

## 5. Record keeping standards

If a student is provided with professional advice by an Advisor, there must be an appropriate record of that advice. Institutions may have a number of separate record keeping systems depending on their operations. There are advantages in Advisory Service records being integrated with other general student records where that is feasible, so that the broad features of a student’s circumstances may be taken into account in their interactions with the institution.

Advisors will need appropriate training to ensure that attributes of client records include the following:

- The contact record must include sufficient contextual information to ensure that the nature of the interaction with the student is clear.
- Information recorded about a student is verifiable. In the event that hearsay or interpretative information is recorded as part of the case, it must be clearly noted that this information has not been verified or is an interpretation.
- Students are advised that there will be a record made of their interaction with the Advisor. The limits of the confidentiality of the record should be made clear to students, as well as the fact that they may obtain a copy of any information recorded about them.
- Institutions must have clearly defined policies and procedures which define which staff may see, add to or modify student records. This may include partial and complete access to records, dependent upon the role of the staff member.
- Client records must be compliant with the relevant Freedom of Information legislation current in the jurisdiction.

## 6. Compliance issues

Unlike counsellors (for example), there are no recognised or required qualifications and no accreditation standards that apply to advisor roles. At the same time, the higher education sector in Australia must meet a broad range of quality standards as expressed in TEQSA legislation and in the National ESOS Code.

Advisors should be expected to:

- Maintain up to date knowledge of relevant legislation
- Maintain up to date knowledge of Education Services for Overseas Students (ESOS) Act and National Code of Practice
- Comply with institutional policies and procedures
- Maintain up to date knowledge of grievance and complaint resolution policies and processes
- Meet Occupational Safety and Health, anti-discrimination, equal opportunity and other legislative requirements in accordance with the parameters of the position
- Be aware of and mitigate potential conflict of interest and dual role issues. (Examples to be considered may include cases where the Advisor is also a student in the employing institution; situations where the advisor is asked by a student to assist them against a student that they are already assisting or a student is requesting assistance to take action against the institution or internal area.)

## **7. Risk management protocols**

It is recommended that institutions have clearly articulated risk management protocols with respect to student advisor roles. In particular, these should address:

- The advisor role when he/she is addressing any case which involves any risk of harm to students, staff, the institution or the community;
- The advisor role in critical incidents; and
- The advisor role in case management of cases where recurrent student behaviour represents a risk of disruption to other students, staff and the wider community

Advisors should also be aware that they are providing advice as an agent of the institution. It is recommended that:

- Institutions have clear guidelines for advisors addressing the responsibility to provide correct advice to the student, within the context of the information available at the time; and
- Appropriately worded disclaimers are available to students indicating the limits of the advice provided

It is also noted that most of the other standards in this document have risk management implications. Advisors subjected to unnecessarily heavy client or other workloads with insufficient supervision, training and support represent a significant risk.

## **8. Professional standards of conduct in student interactions**

The Advisor and student relationship is a professional relationship and all interactions should reflect that fact. Institutions should ensure that queries from students are addressed as courteously and as promptly as possible within the available staff resources. It is recommended that there are clearly articulated standards which describe the level of customer service that students may expect from staff in Advisor roles. These will include standards for face-to-face contact, telephone queries, email queries, and any other channels of communication which may be employed by the institution.

Examples of such standards may include:

- Ensuring the student can identify the name of the staff member with whom they are in contact
- Acknowledgement of the student's contact as soon as possible
- An attempt to satisfy the student need at the time of interaction, or timely referral to the appropriate service area
- Ensure exploration of any further issues beside the initial query
- Minimisation of response time to answer telephone calls, and minimisation of the need to place students "on hold"
- Responsibility to ensure any referral to other services is a successful handover
- Whilst acknowledging that email and most other electronic communication channels are asynchronous, it is important to acknowledge and respond to the student query within a working day
- Awareness that all such communications with students are formal communications – and that appropriate professional standards should be observed. This is most especially the case in electronic communications where there is a written record of the interaction

## **9. Appropriate resource standards**

Advisors should be provided with a work station with ergonomic furniture, appropriate IT and phone to support their role in accordance with standard Human Resources standards for the institution. It may also be necessary to consider mobile resources to allow advisors to meet student needs in locations other than the advisor's work location. There are also situations where it is important to consider the resourcing needs of staff whose role does not necessarily have a regular work station at all – for example, advisors who may visit clients in relatively remote locations.

There are particular resource issues associated with ensuring client confidentiality.

- If advisors are located in an open plan area and in a role which includes contact with clients who may be in distress, it is critical that they have easy access to a confidential space for meeting with students on a face-to-face basis.
- If the role involves regular telephone contact, the location must ensure conversations are not overheard by others.
- Works stations (whether open plan or enclosed offices) must ensure client records are not visible to others. This includes paper records, visibility of screens, and stored electronic records.

#### **10. Recommended position classification/remuneration levels**

Formal classification levels vary across institutions, and consequently it is not possible to use a single descriptor. In general, classification and remuneration will be determined by the duties and levels of responsibility set out in the Position Description.

*Document Endorsed by ANZSSA Executive: November 2015*

*Date for Review: November 2017*



*NOTE: Content for this part of the document is dependent upon institutions being willing to share Position Descriptions and Duty Statements. At the date of publication, the documents below have been supplied with kind permission of the named institutions.*



## Position Description – Student Wellbeing Advisor

### Position Details

<b>Position Title:</b>	Student Wellbeing Advisor
<b>Portfolio:</b>	Academic
<b>School/Group:</b>	Students
<b>Campus Location:</b>	Based at the City Campus, but may be required to work and/or be based at other campuses of the University.
<b>Classification:</b>	HEW 6 (Salary Schedule: <a href="http://www.rmit.edu.au/browse:ID=ewhltl73t01">http://www.rmit.edu.au/browse:ID=ewhltl73t01</a> )

### RMIT University

RMIT is a global university of technology and design, focused on creating solutions that transform the future for the benefit of people and their environments. We are global in attitude, action and presence; urban in orientation and creativity; and connected through active partnerships with professions, industries and organisations.

RMIT University enjoys an international reputation for excellence in professional and practical educational programs and high quality outcome-oriented research.

One of Australia's original educational institutions founded in 1887, RMIT is now the nation's largest tertiary institution. The University offers an extensive range of postgraduate, undergraduate and vocational programs.

RMIT has three Melbourne campuses – in the central business district and in Brunswick and Bundoora in the city's northern suburbs - campuses in Hanoi and Ho Chi Minh City in Vietnam and a site in Barcelona, Spain. With significant partnerships in Hong Kong, China, Indonesia, Malaysia and Singapore, RMIT has a strong educational presence in the Asia-Pacific region. The University's total student population of 82,000 includes 30,000 international students (onshore and offshore).

RMIT is a leader in technology, design, global business, communication, global communities, health solutions and urban sustainable futures. It is ranked in the top 150 universities in the world for engineering, computer science and information systems, economics, communication and media studies, accounting and finance and education in the 2013 QS World University Rankings and 10<sup>th</sup> in Australia. [www.rmit.edu.au](http://www.rmit.edu.au)

## **Portfolio/Group**

### **Academic Portfolio**

The Academic Portfolio is headed by the Deputy Vice-Chancellor (Academic) who leads the planning and implementation of the University's strategies related to RMIT's academic programs and the RMIT student experience.

The Academic Portfolio comprises:

- Academic Registrar's Group
- Office of Dean, Learning and Teaching
- Office of Dean Students
- Office of Deputy Vice-Chancellor (Academic)
- University Library.

The Portfolio is responsible for:

- development and implementation of the Academic Plan in accordance with University strategy as it relates to best practice in learning and teaching, student experience and academic staffing
- oversight of quality assurance for RMIT programs and their contribution to the development of improved outcomes for students and partners
- development and implementation of policy relating to academic profile and its impact on academic programs and staff
- leadership and management of relevant projects deemed as priorities in the RMIT Strategic Plan and Business Plan
- provision of learning resources through RMIT libraries
- identifying and planning for administrative and support services to meet the needs of different student cohorts, on and offshore, across the student life cycle
- promoting access to VET and Higher Education by students from diverse backgrounds and targeted equity groups
- developing and maintaining systems, processes and procedures related to the student record.

For more information: [www.rmit.edu.au/academic](http://www.rmit.edu.au/academic)

### **Students Group**

The Students Group leads the provision of a distinctive, memorable and engaging student experience.

The Group draws on student ideas and feedback to inform RMIT's planning processes and the delivery of an appropriate range of student services and arts, sport and recreation programs, including information and assistance for careers and employment.

The Group builds alliances across the University, working closely with colleges and schools and associated entities to enhance students' engagement with the University and develop a sense of belonging and student cohort experiences that span programs and campuses. It is responsible for liaison with the Student Union (RUSU).

The Group works to ensure that the University is well placed to support the success and retention of diverse student cohorts including first-in family students, Aboriginal and Torres Strait Islander students, older workers and students in programs provided with offshore and onshore partners.

The Group is led by the Dean of Students

Organisational chart

## **Position Summary**

The Student Wellbeing Advisor is a member of a multi-disciplinary team that enhances the experience of RMIT students. They provide individual consultations, group programs and information materials in a range of formats related to studying in Australia, living in Melbourne, financial, housing and welfare matters. The position collaborates with a range of external and internal stakeholders, makes sound judgements and applies knowledge of policies, legislative frameworks and the community services sector to deliver appropriate services and programs for students.

## **Organisational Accountabilities**

RMIT University is committed to the health, safety and wellbeing of its staff. RMIT and its staff must comply with a range of statutory requirements, including equal opportunity, occupational health and safety, privacy and trade practice. RMIT also expects staff to comply with its policy and procedures, which relate to statutory requirements and our ways of working.

Appointees are accountable for completing training on these matters and ensuring their knowledge, and the knowledge of their staff, is up to date.

## **Key Accountabilities**

- Conduct thorough assessment of student circumstances in order to provide appropriate information and options.
- Make sound judgements based on thorough knowledge of University policies and procedures, the community services sector and relevant legislation (e.g. Residential Tenancy Act, Educational Services for Overseas Students).
- Utilise knowledge and expertise related to the housing, finance and welfare needs of diverse student cohorts including international students and students from equity backgrounds.
- Provide flexible delivery of information, advice and referral in a range of contexts (including telephone, email, drop in, one-on-one appointments, Skype, group presentations, online resources) to facilitate the transition, engagement and overall wellbeing of diverse student cohorts.
- Follow processes to ensure a high standard of compliance and customer service is maintained and be involved in ongoing review to ensure improvement of professional practice and business operations.
- Contribute and be committed to the planning, delivery, evaluation and monitoring of the Unit Action Plan and agreed outcomes with an awareness of strategic import and impact.
- Prepare and implement projects and programs which promote the personal, social, cultural, safety and practical welfare needs of students including working with students in peer to peer mentoring.
- Develop effective collaborative and consultative relationships within Student Wellbeing Advisory Services and with colleagues in academic and administrative areas.
- Maintain reliable records, statistics and database information of service activities in line with established protocols.
- Maintain and develop appropriate professional skills and currency of knowledge of the range of accommodation and welfare services in the local community to support the delivery of high quality services and programs to students.
- Establish and maintain links with relevant practice bodies for example, International Student Advisers Network of Australia (ISANA), Australian and New Zealand Student Association Services (ANZSSA), Student Financial Advisers Network (SFAN), Tenants Union, and Consumer Affairs to maintain currency of practice.
- Other duties as directed by the Senior Coordinator, Student Wellbeing Advisory Services.

## Key Selection Criteria

1. Significant knowledge and expertise related to the housing, finance and welfare needs of diverse student cohorts such as international students and students from equity backgrounds and knowledge of relevant legislative frameworks (such as Residential Tenancy Act, Educational Services for Overseas Students).
2. Demonstrated capacity to liaise with internal stakeholders and external community agencies in order to provide students with access to broader university and community resources.
3. High level interpersonal and written communication skills, including a demonstrated ability to write reports and briefings to senior staff.
4. Excellent analytical and problem solving skills particularly in a cross cultural context to increase students' capacities and to achieve positive outcomes.
5. Demonstrated ability to prepare and conduct engaging information sessions to students and staff, utilising a range of presentation approaches, to meet the needs of diverse student cohorts .
6. Experience in undertaking administrative duties with effective management of documentation, use of software applications
7. Capacity to work collaboratively in multi-disciplinary teams in a large organisation and ability to adapt to changing environments.
8. Demonstrated ability to prioritise and manage time effectively with competing priorities in a busy service setting.

## Qualifications

A degree in Education, Social Work, Community Work, Youth Work or related discipline or relevant experience.

Experience in a similar role in tertiary education environment is highly regarded.

**Note:** Appointment to this position is subject to passing a **Working with Children** check.