Detailed Schedule

([click here](#) for one-page "Schedule at a Glance")

Day One: Monday, June 22, 2026

8:15am: Check in & Breakfast

8:45am: Welcome, tour of the University Advising Center, & Institute overview

9:15am: Creating an Advising model central to Student Success

Speaker: Dr. Claire Robinson, Assistant Provost Undergraduate Advising

- Frameworks for Student Success and the central role of academic advising.
- National trends in Academic Advising reform. Overview of models and infastructure.
- Developing a professional advising model. Assessing and addressing institutional needs.
- Managing change and culture shifts.
- Shared oversight of advising to include both university-wide standardized equity (macro) and value the nuances of college, curriculum, and student needs (micro).

10:30am: Sustaining Undergraduate Advising Models*

Speakers: Dr. Claire Robinson, Assistant Provost Undergraduate Advising
         Ali Mathwig, Director of Four-Year Academic Advising

- Clarifying Advisor roles: Academic, Program, and Resource
- Advisor positions and responsiblities, including academic interventions, global communications, advisor onboarding, communities of practice, collaboration and campus partnerships
- Sample position descriptions, Advisor performance evaluations, and Supervisor resources
- Overview of undergraduate advising models in higher education: embedded, hand-off, four-year professional, shared, centralized, decentralized, shared-split.

11:15am: Advising Transfer Students*

Speakers: Amanda Shores, Director of Transfer Student Advising, Academic Success, and Retention
Bill Brown, Coordinator of Direct Transfer Tracks & Transfer Advising

- Special considerations when advising transfer students
- Transfer initiatives that work: direct transfer tracks, advising guides, early transfer advising
- Creating a transfer team. Assessing impact.

Noon: Lunch (provided)

1:00pm: Advisor Training & Professional Development*

Speakers: Jane Bouknight, Senior Program Manager for Advisor Training and Development
Ali Mathwig, Director of Four-Year Academic Advising

- Advising training and certification program
- Advisor communication
- Advisor recognition & awards
- Advisor committee structures (university, college, staff meetings, committees, working groups)

1:45pm: Student Education*

Speakers: Ali Mathwig, Director of Four-Year Academic Advising
Sara McConville, Assistant Director of Student Education, Outreach, and Events

- A brief 15 minute overview of Student Education efforts at USC.
- Partnershps with Student Government (student legislation), creating a Student Advisory Council, Advising Syllabus, workshops for first-year seminars, online resources.
- Interested attendees are welcome to join a breakout session for more information.

2:00pm: Advising Technology & AI Frameworks*

Speakers: Mike Dial, Senior Program Manager for Advising Technology Innovation and Assessment
Brian Dusel, Student Success Systems and Technology Manager

- Role-based access and provisioning
- Artificial Intelligence in Advising: Considerations and a framework for implementation
- Advising Chat Bots
- Degree Audits and Curriculum alignment

- Establishing a technology committee led by advisors
- Advisor assignments

2:45pm: Caseload Management and Academic Intervention*

Speakers: Alyssa Stephens, Assistant Director of Four-Year Advising & Academic Intervention
Mike Dial, Senior Program Manager for Advising Technology Innovation and Assessment

- Academic Interventions that work (Scholarship risk, non-registered, faculty alerts, etc.)
- Supporting Advisors to support students
- Outreach, intervention, and assessment
- Course Program of Student (CPoS) Title IV funding federal mandate

4:00pm: Breakout Session 1

Presenters will host extended time for a deeper dive topical area. Attendees choose a session of their interest.

- <u>Attendees choose one:</u>
  - ☐ Keys to Success in an Advising Model
  - ☐ Transfer Advising
  - ☐ Advisor Training and Professional Development (Jane Boukight) – conference room
  - ☐ Student Education
  - ☐ Advising Technology & AI frameworks
  - ☐ Course Program of Study (CPoS) Title IV funding
  - ☐ Caseload Management & Academic Intervention

4:50pm: Day One Wrap Up

5:30pm: Welcome Social

Day Two: Tuesday, June 23, 2025

8:15am- Breakfast (provided)

9:00am- Day Two opening remarks

9:30am- Curriculum Management*

Speakers: Jenn Tilford, Director of Undergraduate Curriculum Management
Rachel Bradley, Curriculum Coordinator and Exploratory Advisor IV

- Curricular Analytics
- Major mapping, Universal Program of Study
- Advisor/faculty partnerships

10:30am- Exploratory Advising/Academic Coaching/Working with Undeclared Students*

Speakers: Keith Martin, Director of Exploratory Advising & Academic Coaching
Josh Weakland, Assistant Director of Exploratory Advising
Lane Kennedy, Coordinator of Academic Coaching, Exploratory Advisor III and Academic Coach

- The unique and essential role of Exploratory Advising and intentional decision making when changing majors.   Review of Major Miration patterns. (Donor majors, receiver majors, static majors, pivot majors.)
- Defining Academic Coaching (and how it is distinct from Study Skills Coaching and Academic Advising).   Five pillars of academic coaching and how to best support academically-at risk students.
- Advising Undeclared and Undecided Students. Discussing Career Outlook when selecting a major.

11:30am Lunch (provided)

1:00pm: Administrative Oversight*

Speakers: Sarah Jerald, Senior Manager, UAC Operations and Personnel
Dr. Claire Robinson, Assistant Provost

- Overview of Advisor Career Ladders: How was it developed?
- What is the agreement with the colleges?
- How does the UAC work with HR?
- What is the budget model/funding structure of the UAC?
- Strategic planning
- Assessment

2:30pm: Breakout Session 2

- Attendees choose one:
    - Advisor Training and Professional Development
    - Transfer Advising
    - Student Education
    - Advising Technology & AI frameworks
    - Caseload Management & Academic Intervention
    - Curriculum Management
    - Exploratory Advising/Academic Coaching/Undeclared
    - Administrative oversight, budget, strategic planning

3:45pm: Breakout Session 3

- Attendees choose one:
    - Advisor Training and Professional Development
    - Transfer Advising
    - Student Education
    - Advising Technology & AI frameworks
    - Caseload Management & Academic Intervention
    - Curriculum Management
    - Exploratory Advising/Academic Coaching/Undeclared
    - Administrative oversight, budget, strategic planning

4:50pm: Concluding remarks for Day 2

5:00pm: Adjourn

6:00pm: Dinner on your own

- Restaurant recommendations
  *Reservations provided upon request. Please email Tina Onley with number of guests and preferred restaurant.
    - [Cola's](#)
    - [Mr. Friendy's](#)

Day Three: Wednesday, June 23, 2025

8:30am- Breakfast (provided)

*Attendees to bring luggage to Advisor Training Room

9:00am: College Partnerships and College Visit #1

Speaker: Rebecca Boyd, Undergraduate Student Services Manager, College of Information & Communications

- o Collaboration in action
- O Tour the College of Information and Communications and meet with Advising leadership to learn how students are advised in 9 majors, including Broadcast Journalism, Advertising, Visual Communications, and Public Relations

10:30am: College Visit #2

- o Advisor voices

11:30am: Institute Wrap Up

- Institute Survey
- Action Planning and Next Steps
- Review of Resources
  - o Attendees will have exclusive access to a wide range of online resources (via a Padlet), which includes: position descriptions, career ladder templates, MOU templates, strategic plans, sample training frameworks, and much more.

Noon: Adjourn

1:30-5:00pm: Post Institute Consultations (Optional)

- Institute faculty will be available for post- institute consultations for interested attendees.
- Topics selected by attendees.