



EDUCATIONAL ADVISING SELF ASSESSMENT

The attached survey was designed to help you evaluate or assess the level of your work in educational advising. We hope that by analyzing the following list of professional skills and center services, you will become more aware of your strengths and the areas that need additional resources or training. Identifying your strengths and articulating them to your REAC and to ECA/A/S/A can help us to share and promote the excellent work that you do. It also lets us know that you may be a resource to draw on for training events for newer advisers or for presentations at international conferences. Being aware of your competence levels in professional skills can also help you determine where you may want to request additional training, help, or advice to improve. Evaluating the resources and services provided by your EducationUSA Advising Center will help you define your objectives and perhaps provide you with additional ideas on how best to serve your students/clients.

For each topic listed, please consider your personal performance or your center's performance. After you have done so:

- Give yourself a rating using the suggested rating scale.
- Provide comments (demonstrate your accomplishments, indicate whether improvements are needed, jot down ideas or ask questions).
- List your objectives, which can be a plan for future achievements in each area.

Please take sufficient time to reflect on each segment/statement. Only by carefully considering your services and needs will it be possible to make the improvements you want for yourself and your center.



EDUCATIONAL ADVISING SELF EVALUATION

Adviser's Name:

Center Name:

City, Country, Region:

Date:

Skill Level Ratings: (applicable to you or, in some questions, to your advising center)

- 1 - Skill/knowledge needs to be developed
- 2.- Adequate skill knowledge level
- 3.- Proficient in this area

Objectives – Comment on how you plan to improve anything in the respective section, which you feel needs attention/improvement

Part I. Part I should be completed by each adviser in the center.

Personal and professional skills

1. **Basic Advising Skills:** Please rate your Skill Level 1, 2, or 3 for the following:

- _____ Ability to guide students in the selection of appropriate institutions.
- _____ Ability to provide information to students on the application process.
- _____ Ability to explain to/advise students about a typical U.S. campus.
- _____ Ability to explain/advise about scholarships and other forms of available financial assistance for all levels of study.
- _____ Ability to explain and advise about the visa application process.
- _____ Ability to explain and advise about standardized test requirements.
- _____ Ability to explain regional and professional accreditation of U.S. institutions and programs.
- _____ Ability to advise about distance education.
- _____ Ability to organize and conduct group-advising sessions and convey information so that students are able to follow through, effectively applying new knowledge.
- _____ Ability to get students to assume responsibility for their educational plans and for the application process.
- _____ Ability to prepare and carry out predeparture orientations.

Please comment on your strongest basic advising skills from above:

Objectives: Please comment on how you plan to improve anything in the section above which you feel needs attention/improvement.

2. **Organization:** Please rate your Skill Level 1, 2, or 3 for the following:

- _____ Ability to organize the physical setting of your personal work area in the advising center for effective and efficient use.
- _____ Ability to easily locate the materials/information you need.
- _____ Ability to organize the center to look/be efficient and professional.
- _____ Ability to organize time into an effective work schedule for services to the public and related advising work.
- _____ Ability to prepare an effective annual plan for your advising center.

Please comment on strongest organization points:

Objectives: Please comment on how you plan to improve anything in the section above that you feel needs attention/improvement.

3. **Customer Service:** Please rate your Skill Level 1, 2, or 3 for the following:

- _____ Ability to interview students, draw out their questions, and assist them in identifying their needs and interests and generating options available to them.
- _____ Ability to guide students through the use of the advising center resources.
- _____ Ability to lead students to make their own decisions.
- _____ Ability to follow up with students to ensure they received the information they needed and are clear on what steps to take.
- _____ Ability to design and/or use a variety of supplemental reference material and information (i.e., handouts, web pages, bulletin boards, etc.).

Please comment on strongest customer services:

Objectives: Please comment on how you plan to improve anything in the section above which you feel needs attention/improvement.

4. Volunteer and/or Non-Advising Personnel Management: *If you do not have or work with volunteers, go to question # 5.* Otherwise, please rate your Skill Level 1, 2, or 3 for the following

- _____ Ability to successfully supervise non-advising personnel and/or volunteers.
- _____ The volunteer program is effective and volunteers are contributing to the efficiency and work of the center.
- _____ Volunteers are content, feel rewarded, and are part of the team.

Describe the training program provided for volunteers.

Describe the methods you use to recruit and retain volunteers.

Objectives: Please comment on how you plan to improve anything in the section above which you feel needs attention/improvement/to be sustained.

5. **Financial sustainability:** If you are legally allowed to charge for services, then answer the following questions. If not, go on to question #6. Skill Level 1, 2 or 3

Approximate percentage of your total budget met through cost defrayment/income generation _____

_____ Ability to prepare and implement a business plan for your center, detailing revenue and expenditures.

_____ Aware of options open to your center for cost defrayment and income generation.

_____ Ability to maintain accurate financial records for your advising center.

If income generation is legally permitted, but your center is not involved in income-generating activities, please explain why.

Describe any financial threats your center faces and propose solutions.

Please comment on strongest cost defrayment/income generation skills from above.

Objectives: Please comment on how you plan to improve anything in the section above which you feel needs attention/improvement/to be sustained.

6. **Communications/Relationships:** Skill Level 1, 2, or 3 for the following:

_____ Level of communications/relationship with your host institution or boss.

_____ Level of working relationship with the staff of your advising center.

_____ Level of communication/relationship with your REAC.

_____ Level of communication/relationship with your program officer at ECA/A/S/A.

_____ Level of communications/relationships with the U.S. officers and local staff in the Public Affairs Section at the U.S. Embassy.

_____ Level of communications/relationships with the head of the Consular Section and visa officers at the U.S. Embassy/Consulate General.

_____ Level of communications/relationship with the head of the Foreign Commercial Service and officers in the Commercial Section at the U.S. Embassy.

_____ Level of communications/relationships with your local community (schools, universities, professional organizations, government, etc).

_____ Level of communication/relationships with U.S based international educators, particularly international admissions officers.

_____ Level of response to requests for credential evaluation information (e.g. from Inter-L).

_____ Level of communications/relationships with fellow educational advisers regionally.

_____ Level of communications/relationships with fellow educational advisers globally.

_____ Level of participation on the REAC regional listserv or other listservs.

List the other listservs of which you are a member:

_____ Utilization of news media when appropriate, (e.g., with placements of announcements or articles about study in the United States).

_____ Level of active participation in professional activities and organizations.

Provide some examples of how you do this.

Please comment on strongest communication/relationship skills from above:

Objectives: Please comment on how you plan to improve anything in the section above which you feel needs attention/improvement. What are your three highest priorities?

7. **Evaluation/Writing/Reporting Skills:** Skill Level 1, 2, or 3

- _____ Ability to keep a log that accurately records all advising center contacts.
- _____ Reporting your center's good work and successes (to your immediate supervisor, to your REAC and program officer, to the Public Affairs Section of the U.S. embassy/consulate).
- _____ Reporting your center's visitor statistics to your REAC.
- _____ Response to questionnaires, surveys, cables, requests for feedback from your REAC or program officer.
- _____ Designing and submitting proposals for conference sessions/workshops.
- _____ Reporting after training, conferences, workshops.
- _____ Preparation of an annual plan for your center and a related end-of-the-year report to gauge your accomplishments.
- _____ Ability to provide information about your center's activities.
Explain the mechanisms you use below, e.g. "brochure" "newspaper ads" etc.

- _____ Ability to write a grant proposal.

Please list grants you have applied for:

- _____ Writing articles for your REAC newsletter or other newsletters/journals.

Give the title/subject, date and what newsletter/magazine:

- _____ Research and evaluation of new developments in education in your country and in the U.S.

Please comment on strongest writing/reporting skills from above:

Objectives: Please comment on how you plan to improve anything in the section above which you feel needs attention/improvement/to be sustained

8. Computer/Technology Skills: Skill Level 1, 2 or 3

Computer skills --

- _____ E-mail
- _____ Ability to conduct efficient Internet searches, find information on the web.
- _____ Word processing
- _____ PowerPoint presentations
- _____ Database preparation and use (Excel, Access, Oracle)
- _____ Website design
- _____ Comfort with changing requirements and technical needs of your center.

Please comment below on whatever technical training you feel would be helpful in your work

9. Presentation Skills: Skill Level 1, 2 or 3

- _____ Organization of topic and presentation in front of a group of students.
- _____ Organization of topic and presentation in front of a group of educational advisers.

List examples of recent presentations: _____

- _____ Organization of topic and presentation in front of other audiences who may be interested in the work of your center.

Part II.

Center Resources and Services

1. Hours of Operation

How many hours a week is your advising center library open to the public free of charge? _____

How many hours a week is your advising center library open to the public for a fee? _____

How many hours a week is your advising center library open to members only? _____

2. Physical Premises and Staff

Is the physical setting of the advising center organized for efficient and effective use by students?

Yes _____ No _____

Describe space and staff challenges to the effectiveness of the advising program:

Objectives: Please comment on how you will address the challenges described above:

3. Resources and Materials:

Are your books and materials adequate to meet the needs of people using your center? Yes _____ No _____

If not, please list titles/subjects that would be helpful:

What types of materials would you like to receive from U.S. institutions?

How can you obtain the materials you want?

Do you ensure that the material/catalogs you have in your center represent accredited institutions?
Yes _____ No _____

4. Technology and Equipment:

Do you have Internet access and computers for student use? Yes ____ (complete below) No ____

Make an inventory of all advising equipment, including date of receipt, use, Internet connectivity (computers, TV/VCR, photocopiers):

How do you maintain/upgrade your center's advising equipment?

If your equipment is not in good working order, what is your plan for repair and maintenance?

5. Basic Advising Services:

Check which of the following basic services are offered at your center and indicate, when there is a cost involved, what is the fee charged.

- | | | |
|---|---------------------------------------|-------------------------------|
| <input type="checkbox"/> Memberships | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> One-on-One Advising | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Pre-admissions Group Advising | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Pre-departure Orientation Programs | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Test Registration Services | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Testing Administration/Proctoring | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Computer Searches for Students | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Certifying Documents | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Photocopying for students | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Fax Transmissions for/to students | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Services for University Recruiters | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> University Video/CD-ROM Rental | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Website | | |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Free Service | <input type="checkbox"/> Cost |

Please comment on strongest or weakest points of your basic advising services:

Objectives: Please comment on how you plan to improve anything in the section above which you feel needs attention/improvement

6. Topical lectures/Programs/Special events:

Do you offer special group advising programs, such as “applying to MBA programs” or “how to write a personal essay” or an English language roundtable? Yes_____ No_____

List all special group advising programs, the frequency with which they are offered, and if you charge for participation in these programs.

Does your center organize or participate in education fairs, college fairs, or career fairs?)

Yes_____ No _____

List those conducted and frequency with which they are held.

List the new programs you plan to introduce in the next year:

7. **Pre-Departure Orientations:**

Do you conduct a Pre-departure Orientation? Yes _____ No _____

Provide details regarding frequency per year, average attendance, and indicate if you charge a fee to attend. If so, state the fee. Likewise, if you have sponsors, indicate their contribution, financial and otherwise.

8. **Outreach:**

Does your center conduct outreach activities in schools and other locations? Yes _____ No _____

Provide details regarding venues, audiences, and frequency of outreach programs:

Please comment on the strongest of your group/predeparture/outreach/special programs:

Objectives: Please comment on how you plan to improve anything in the section above which you feel needs attention/improvement/to be sustained

9. Testing:

Is your center a paper and pencil or Computer-based testing site? Yes _____ No _____
If yes, please indicate which type _____

Specify which tests you administer:

If you offer test preparation, indicate below which tests, and describe the format you use (i.e. classes, software, Internet, books, group advising, etc.)

Please list any specific testing issues your center has faced in the past six months:

How have you worked to resolve the issues listed above?

10. Center visibility:

Does your center have information about its location, hours, and services in a

Brochure yes _____ no _____

A website yes _____ no _____

Other (please specify) _____

Where and how does your center display the EducationUSA logo?

Please comment on the strongest or weakest points of your center's visibility/marketing:

How does your center ensure that people know about advising services and are able to use them?

Objectives: Please comment on how you plan to increase your center's visibility.

11. Other:

Do you have services, resources, events, or ideas that are not included in the categories above that may be helpful and interesting to share with other advisers? Please describe below:

Part III.

1. JOB DESCRIPTION (DUTIES AND RESPONSIBILITIES)

Please attach a copy of your job description.

2. SIGNIFICANT ACCOMPLISHMENTS OF THE PAST YEAR

Indicate job related accomplishments. Also, indicate those activities or accomplishments that were significant in your career development.

3. GOALS FOR YOURSELF AND YOUR ADVISING CENTER (Use additional paper if necessary)

Review the comments and objectives you've provided in the survey. Indicate the ten most important goals and objectives you will focus on to improve your center and the services it provides or to maintain the present degree of excellence you now possess.

Short Term Goals and Objectives (the next six to twelve months):

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____

Long Term Goals and Objectives (a five year plan/outline)

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____

4. PERSONAL GOALS

Indicate what goals and objectives you have to further develop your career. Next, briefly describe the specific steps you will undertake to achieve these goals. Include types of advising assignments, programs, or projects that you would hope to accomplish and job related assignments or duties you would prefer in the future. Use extra sheets if necessary.

Short Term Goals:

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____

Long Term Goals:

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____

5. YOUR FIVE-YEAR TRAINING PLAN

Please list the training activities that would benefit your professional development over the next five years.

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____

6. ATTACHMENTS

In addition to your job description, please attach

- a. your most recent annual program plan
- b. your most recent annual report
- c. business plan

7. OTHER COMMENT/SUGGESTIONS

Please share any additional thoughts you may have related to advising that may not have been covered above.