Advisor Performance Evaluation: Best Practices

The Office of Undergraduate Advising offers the following recommendations for conducting advisor performance evaluations. Don’t hesitate to contact us if we can be of assistance as you are developing and conducting your process.

1. Evaluation process must include a pre-evaluation discussion between the advisor and supervisor.

The supervisor and advisor should sit down together and identify the evaluation components that will be used throughout the evaluation process (i.e. self-evaluation form, supervisor-evaluation form, advisor portfolio, and/or evaluation summary). Both the advisor and supervisor should agree upon which components will most effectively serve the purpose of a performance evaluation for the advisor’s specific role.

The advisor competencies or behaviors on which the advisor will be evaluated should also be determined and additional position-specific competencies should also be identified. A rating scale should be agreed upon for the evaluation form.

2. Evaluation process should include a supervisor-observation component.

Observation by the supervisor or a peer is strongly recommended as a way to both evaluate advisor competencies and position-specific responsibilities, and also to provide an avenue for supervisors to learn more about advisor roles and responsibilities. The rating system for evaluating skills and competencies will be determined by the advisor and supervisor prior to engaging in the evaluation process.

We recommend that three student interactions of any kind (ex. SOAR, appointments, walk-ins, group advising, etc.) are observed for the evaluation, though this should be agreed upon by the advisor and supervisor.

3. Evaluation process should include a self-evaluation component.

A self-evaluation that evaluates advisor competencies and position-specific responsibilities is strongly recommended as a way to engage in self-reflection and identify areas for improvement. This recommendation aligns with the professional standard that self-reflection is a best practice in the advising profession.

4. Evaluation process could include an advisor portfolio component.

The advisor portfolio is effective for documenting professional activities and development (“professional branding”), as well as providing a detailed narrative to educate supervisors on advisor roles and responsibilities.
We recommend that every advisor maintain a portfolio year-round. The advisor portfolio can be used for a variety of activities, one of which may be using it to inform a performance evaluation.

5. Evaluation process must include a post-evaluation discussion between the advisor and supervisor.

The discussion will allow the advisor and supervisor to summarize the main points from the evaluation and discuss plans for professional development. The discussion should also address ways in which advisors can be better supported in their roles.

After the post-evaluation discussion, it is strongly recommended that both the advisor and supervisor sign a document acknowledging what was discussed. The signatures will not necessarily indicate agreement with what was discussed but will serve as documentation that the evaluation took place.