

The Proactive Advising Strategies Badge

Accessible web publication version

Badge overview

This badge recognizes an advisor's ability to use student information, advising technologies, institutional partnerships, and documented follow-up to identify needs early, implement timely interventions, support persistence and completion, and improve advising practice through assessment. The earner must receive a rating of Competent or Accomplished in every rubric competency. If any competency is rated Developing, the badge is Not Yet Awarded, and the advisor receives targeted revision guidance and an opportunity to resubmit the affected evidence.

Best advising fit

Advisors responsible for caseload monitoring, milestone outreach, early alerts, academic progress, completion planning, graduation support, student-success campaigns, coordinated case management, or assessment of advising practices.

Competencies demonstrated

1. Interprets student information to identify risks, barriers, milestones, and opportunities.
2. Designs timely, specific, student-centered proactive interventions.
3. Uses advising technology and documentation to support coordinated follow-through.
4. Collaborates across offices to provide continuous and accountable care.
5. Connects interventions to persistence, completion, transfer, career, and post-completion goals.
6. Assesses intervention results and uses evidence for continuous improvement.

Badge-level career readiness alignment

Primary alignment: Critical Thinking; Technology; Teamwork; Leadership; Professionalism.

Supporting alignment: Communication; Career and Self-Development; Equity and Inclusion.

These competencies are demonstrated through interpretation of student information, timely intervention, ethical technology use, professional documentation, cross-unit coordination, completion planning, and evidence-based improvement.

Badge scope and institutional alignment

Badge 3 corresponds to Advising Excellence Topics 6 through 9, including assessment of advising needs, early alerts, flags, holds, referrals, degree audits, graduation, reflection, planning, and assessment of data. The proposal defines the badge as using advising technologies, institutional partnerships, and student data to implement proactive interventions that improve persistence and completion. It identifies a capstone case, Starfish intervention, documentation review, and portfolio as appropriate evidence.

The institutional alignment emphasizes Strategic Plan Goal 2 milestones, alerts, equitable supports, and data-informed action; Goal 3 common advising technology, progression monitoring, consistent support, retention, and completion; and Goal 4 post-completion preparation. The Academic Master Plan basis includes milestone advising, a common advising platform, data analytics, cross-divisional coordination, post-completion support, assessment mechanisms, student outcome measures, and continuous improvement.

Competency 1: Data-informed identification of risks, barriers, milestones, and opportunities

Competency statement

Interprets student information to identify risks, barriers, milestones, and opportunities.

Framework alignment and evidence

NACE and Framework Alignment	Evidence Examples
NACE: Critical Thinking; Technology. NACADA: Informational; Relational. Conditions of Excellence: Technology Enabled Advising; Student Purpose and Pathways; Improvement and the Scholarship of Advising; Equity, Inclusion, and Diversity. ACPA/NASPA: Assessment, Evaluation, and Research; Technology; Advising and Supporting. CAEL ALLIES: Data-Driven Planning, including use of relevant information to advance equity and student success; Student Experience, including support responsive to adult learner needs and circumstances. AAC&U VALUE: Critical Thinking; Quantitative Literacy; Information Literacy. MC Strategic Plan: Goal 2, milestones, alerts, targeted supports, and data-informed action plans; Goal 3, use of data to monitor enrollment, progression, post-completion success, retention, and completion. Values: Innovation, Integrity, Equity and Inclusion, and Adaptability. Academic Master Plan: Goal 1, milestone-based Advising Forward, data analytics, purposeful planning, common advising technology, and monitoring of students' academic and career goals; Measuring Success, retention, credit accumulation, graduation, transfer, and employment indicators.	Data review, dashboard analysis, Starfish case, degree audit, needs summary

Performance levels

Developing	Competent	Accomplished
Notifies an obvious issue but relies on incomplete information, misinterprets a signal, or does not verify the data. Context, student voice, equity, or competing explanations receive limited attention.	Uses relevant information from more than one source, verifies the data, identifies the priority need or opportunity, and explains why action is warranted.	Detects patterns across indicators, distinguishes signal from noise, considers equity and missing information, identifies both risk and opportunity, and explains the limits of the available data.

Competency 2: Timely and student-centered intervention design

Competency statement

Designs timely, specific, student-centered proactive interventions.

Framework alignment and evidence

NACE and Framework Alignment	Evidence Examples
NACE: Leadership; Critical Thinking; Communication. NACADA: Relational; Informational. Conditions of Excellence: Student Purpose and Pathways; Learning; Equity, Inclusion, and Diversity. ACPA/NASPA: Advising and Supporting; Leadership; Student Learning and Development. CAEL ALLIES: Student Experience, including proactive student support, academic empowerment, career relevance, and interventions responsive to learner needs and barriers. AAC&U VALUE: Critical Thinking; Integrative Learning; Problem Solving; Written Communication. MC Strategic Plan: Goal 2, milestone alerts, support for students who do not meet milestones, equitable support for unique populations, and timely action plans; Goal 3, consistent support and increased equitable retention and completion. Academic Master Plan: Goal 1, structured program advising at key milestones, research-backed approaches targeting retention and completion, timely responses to identified risks, and coordinated student engagement.	Outreach plan, intervention sequence, communication campaign, case response

Performance levels

Developing	Competent	Accomplished
Proposed action is generic, reactive, delayed, or disconnected from the identified need. Timing, channel, student choice, escalation, or follow-up is unclear.	Designs a timely, specific intervention using an appropriate communication channel, clear next steps, reasonable escalation points, and opportunities for the student to respond and make choices.	Creates a personalized, multistep intervention with contingencies, milestone logic, accessible communication, and purposeful timing. Anticipates barriers and adapts the strategy while preserving student agency.

Competency 3: Technology-enabled coordination, intervention, and case management

Competency statement

Uses advising technology and documentation to support coordinated follow-through.

Framework alignment and evidence

NACE and Framework Alignment	Evidence Examples
NACE: Technology; Professionalism. NACADA: Informational. Conditions of Excellence: Technology Enabled Advising; Collaboration and Communication; Organization. ACPA/NASPA: Technology; Law, Policy, and Governance; Personal and Ethical Foundations; Assessment, Evaluation, and Research. CAEL ALLIES: Organizational Capacity and Policy and Student Experience, including technology-supported services, clear processes, data stewardship, and coordinated learner navigation. AAC&U VALUE: Information Literacy; Ethical Reasoning; Integrative Learning. MC Strategic Plan: Goal 3, implementation of common advising technology, monitoring of academic progression, data-informed student support, and consistent services. Values: Integrity, Innovation, Excellence, and Adaptability. Academic Master Plan: Goal 1, a shared advising platform, cross-divisional transparency, collaborative access to student progress, continuity of operations, platform integration, and maximized technology adoption and use.	Starfish record, outreach log, documentation note, status update, workflow map

Performance levels

Developing	Competent	Accomplished
Technology actions are incomplete, late, inaccurate, or difficult to follow. Documentation is vague, subjective, excessive, or missing information needed for continuity.	Uses the appropriate system functions accurately, documents objective and actionable information, updates status or follow-up fields, protects privacy, and enables another authorized employee to understand the case.	Integrates multiple tools or workflow steps efficiently, identifies data-quality or process problems, creates reusable documentation practices, and improves continuity without collecting unnecessary information.

Competency 4: Coordinated care, referral follow-up, and cross-functional student support

Competency statement

Collaborates across offices to provide continuous and accountable care.

Framework alignment and evidence

NACE and Framework Alignment	Evidence Examples
NACE: Teamwork; Communication; Leadership. NACADA: Relational; Informational. Conditions of Excellence: Collaboration and Communication; Organization; Commitment; Equity, Inclusion, and Diversity. ACPA/NASPA: Advising and Supporting; Organizational and Human Resources; Leadership; Social Justice and Inclusion. CAEL ALLIES: Organizational Capacity and Policy and Student Experience, including strategic partnerships, coordinated services, student support, and institutional structures that strengthen persistence and completion. AAC&U VALUE: Teamwork; Integrative Learning; Problem Solving. MC Strategic Plan: Goal 1, partnerships addressing mental health, basic needs, and students' academic journeys; Goal 2, equitable student support; Goal 3, consistent support regardless of location or program. Academic Master Plan: Goal 1, strengthened alignment between Student Affairs and Academic Affairs, common advising infrastructure, deepened partnerships across divisions, shared resources, collaborative technology use, and coordinated escalation of transfer or service challenges.	Partner map, referral record, case timeline, ownership matrix, follow-up plan

Performance levels

Developing	Competent	Accomplished
Sends a referral or resource list without establishing role clarity, ownership, or follow-through. The plan may duplicate services or leave gaps between offices.	Engages the appropriate partners, clarifies roles, completes a warm handoff when appropriate, documents responsibilities, and follows up on unresolved needs.	Coordinates a complex cross-unit response, resolves handoff barriers, maintains continuity over time, balances shared responsibility with student autonomy, and identifies process improvements that strengthen future coordination.

Competency 5: Persistence, completion, and post-completion planning

Competency statement

Connects interventions to persistence, completion, transfer, career, and post-completion goals.

Framework alignment and evidence

NACE and Framework Alignment	Evidence Examples
NACE: Career and Self-Development; Critical Thinking. NACADA: Informational; Relational. Conditions of Excellence: Student Purpose and Pathways; Learning; Technology Enabled Advising. ACPA/NASPA: Advising and Supporting; Student Learning and Development; Leadership. CAEL ALLIES: Student Experience, including academic empowerment, career connections and relevance, learner navigation, and support for persistence, completion, and employment transitions. AAC&U VALUE: Integrative Learning; Critical Thinking; Foundations and Skills for Lifelong Learning. MC Strategic Plan: Goal 2, academic and career advising at key milestones and support for students who do not meet milestones; Goal 3, equitable retention and completion; Goal 4, career development, employability, experiential learning, and post-completion success. Academic Master Plan: Goal 1, retention-focused advising and integration of academic, career, and transfer goals; Goal 2, program maps from entry through completion, employment, new skilling, and transfer; Goal 4, workforce readiness, transfer success, competency evidence, and preparation for life beyond MC.	Degree audit, completion plan, graduation plan, transfer or career transition plan

Performance levels

Developing	Competent	Accomplished
Focuses only on the immediate issue or current term. Graduation, transfer, career, financial, credit, or milestone implications are missing or incomplete.	Connects the intervention to academic progress, completion requirements, graduation, transfer, career, or another relevant post-completion goal. Establishes measurable next steps and a follow-up point.	Anticipates likely bottlenecks, compares alternative pathways, considers time, cost, credit applicability, and post-completion consequences, and helps the student build a sustainable plan beyond the immediate intervention.

Competency 6: Assessment and continuous improvement

Competency statement

Assesses intervention results and uses evidence for continuous improvement.

Framework alignment and evidence

NACE and Framework Alignment	Evidence Examples
NACE: Critical Thinking; Leadership; Professionalism. NACADA: Conceptual; Informational. Conditions of Excellence: Improvement and the Scholarship of Advising; Learning; Technology Enabled Advising; Advisor Selection and Development. ACPA/NASPA: Assessment, Evaluation, and Research; Leadership; Organizational and Human Resources; Personal and Ethical Foundations. CAEL ALLIES: Data-Driven Planning and Organizational Capacity and Policy, including assessment of learner outcomes, identification of equity gaps, institutional capacity building, and evidence-informed improvement. AAC&U VALUE: Critical Thinking; Quantitative Literacy; Information Literacy; Integrative Learning. MC Strategic Plan: Goal 2, data-informed decisions, timely action plans, implementation of change, and evaluation of progress; Goal 3, data-informed program development and student support, progression monitoring, retention, and completion. Values: Excellence, Innovation, Integrity, and Adaptability. Academic Master Plan: Goal 1, evaluation of Advising Forward and academic services; Measuring Success, student achievement indicators, qualitative feedback, professional development impact, disaggregated results, baseline development, annual targets, dashboards, and continuous improvement.	Outcome summary, mini-project, portfolio reflection, revised workflow

Performance levels

Developing	Competent	Accomplished
Describes what was done but provides no clear baseline, indicator, outcome evidence, limitations, or reason for changing practice.	Defines an appropriate indicator, reviews available results, identifies limitations, and proposes a specific improvement based on the evidence.	Uses multiple quantitative or qualitative evidence sources, examines differences among student groups where appropriate, tests or recommends a revision, and communicates learning that can inform broader advising practice.