

# Effective Advising Framework

## A Guide to Developing an Individual Planning System



Every student empowered to engage in individual career and academic planning; educators equipped with the knowledge, resources, and time to support all students in planning and preparing for postsecondary success.

This framework provides a clear vision for designing and implementing an individual planning system defined by TEC §33.005 as one of four delivery components of a comprehensive school counseling program to guide a student as the student plans, monitors, and manages the student's own educational, career, personal, and social development. The system leverages internal partners, external partners, and high-quality advising materials and assessments to support the whole child in postsecondary planning and preparation. An individual planning system results in effective advising for every student.

The Effective Advising Framework defines five prioritized levers that are essential in high-performing individual planning systems. Each lever includes:

- **District Commitments** – These commitments describe the roles and responsibilities of the administrators who support, supervise, and manage the school counseling program staff.
- **Essential Actions** – These actions describe what the most effective school counseling program staff do to implement and continuously improve an individual planning system.
- **Key Practices** – These practices outline what each essential action entails when implemented with fidelity.





Lever

# 1 Strong Program Leadership and Planning

## Description

A steering committee with clear roles and responsibilities will develop, implement, and monitor an individual planning system that supports all students in their postsecondary planning and preparation.

## District and Campus Commitments

- ▶ Administrators prioritize the convening of a steering committee to plan for and monitor implementation of the individual planning system and provide adequate time and support for steering committee members to conduct their roles and responsibilities.
- ▶ Administrators authorize at least one member of administration to participate in the steering committee and routinely coordinate with the certified professional school counselor(s) in the planning, implementation, and evaluation of a data-driven comprehensive school counseling program.
- ▶ Administrators participate in training on the effective implementation of a comprehensive school counseling program as required by TEC §21.054.
- ▶ Administrators include school counseling program leader(s) on district and campus leadership team(s) to ensure alignment of the counseling program and district/campus goals.
- ▶ Administrators ensure that counseling and advising are reflected in district and campus goals.
- ▶ Administrators ensure that effective advising services are well organized within the district's comprehensive school counseling program by participating in the development and approval of the organizational structures and processes of the individual planning system.

## Essential Actions

### Essential Action 1.1

**Develop clear data-driven goals for the individual planning system to graduate all students to be ready for college and career, including careers in the military.**

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- A steering committee convenes under the direction of a certified professional school counselor or administrator who will be responsible for the planning and monitoring of the individual planning system. The Effective Advising Steering Committee represents elementary and secondary levels and includes, but is not limited to, one certified professional school counselor, one administrator, a representative of career and technical education, and a representative of students from special populations such as the Transition and Employment Designee (TEC §29.0112).
- The Effective Advising Diagnostic Tool is completed on an annual basis to identify levers, essential actions, and key practices that will ensure fidelity of implementation and continuous improvement of the individual planning system.
- Student-level formative and summative metric data for all student populations is collected and disaggregated routinely to drive equitable practices. This data is shared with school counseling program staff and administrators to inform goal setting related to effective advising.
- The school counseling program staff regularly administers a needs assessment to all students and caregivers for the purpose of collecting, analyzing, and communicating data related to college, career, and military readiness.

### Essential Action 1.2

**Set K–12 grade level expectations for academic development, career development, personal and social development, and financial literacy to ensure all students are on-track to graduate prepared for postsecondary success.**

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- Steering committee members:
  - ✓ complete the Effective Advising Gap Analysis to identify any gaps in the district's individual planning system.
  - ✓ ensure developmentally appropriate grade level expectations are set for kindergarten through grade 12.
  - ✓ identify metrics for each developmental domain to measure student progress toward grade level expectations.
- School counseling program staff:
  - ✓ track the identified metrics for all students in the district and monitor students' progress toward grade level expectations.
  - ✓ use a multi-tiered system of student support to plan targeted and intensive interventions for students who are not on-track to meet grade level expectations.
  - ✓ identify students in need of tier 2 and tier 3 interventions.
  - ✓ develop a community resource guide for referrals to external partners who can provide intensive interventions for at-risk students in tier 3.

### **Essential Action 1.3**

**Develop an organizational structure for the school counseling program staff, and internal partners who will be responsible for the implementation of advising services that lead all students toward grade level expectations.**

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- A certified school counselor is identified by the district as a leader to oversee the implementation of an individual planning system through the district's comprehensive school counseling program.
- School counseling program staff have clear roles and responsibilities that are aligned to the components of a comprehensive school counseling program to support all students toward grade level expectations.
- School counseling program leader(s) coordinate with administrators to assess the master schedule and identify courses and curriculum that can be embedded to support advising services.
- School counseling program leader(s) and administrators identify teachers as internal partners in advising to implement advising curriculum into their classrooms to support students in making progress toward grade level expectations.
- The school counseling program staff has a clear communication plan for communicating news, updates, and outcomes to the school board, administrators, internal and external partners, and families.

### **Essential Action 1.4**

**Identify tools and resources to support the leadership and planning of the individual planning system.**

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- A caseload management system is provided to support efficiency and efficacy of the individual planning system and to track the provision of equitable advising for all students toward grade level expectations.
- A tool is provided for monitoring the student metrics set within the individual planning system.
- School counseling program staff develop an asset map of tools and resources that align with grade level expectations and identify gaps in advising materials.

### **Essential Action 1.5**

**Identify external partners to fill gaps in the implementation of effective advising.**

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- School counseling program leader(s) review the organizational structure of school counselors, advisors, and internal partners who are responsible for implementation of advising services and identify gaps in tier 1, tier 2, and tier 3 services that may hinder students from meeting grade level expectations.
- School counseling program leader(s) coordinate with administrators to identify funding sources and determine an annual budget for contracted services.
- External partners are vetted to ensure equitable, safe, and secure services will be provided to students.



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2

## Effective, Well-Supported School Counselors and Advisors

### Description

A strong comprehensive school counseling program retains effective, well-supported school counselors and advisors by strategically recruiting, selecting, assigning, and inducting school counselors and advisors, so that all students have equitable access to high-quality advising.

### District and Campus Commitments

- ▶ Administrators recognize the recommended school counselor to student ratios that support the district's overall comprehensive school counseling program.
- ▶ Administrators provide training to equip school counselors to lead a program that is free from bias and inclusive of all students.
- ▶ Administrators provide ongoing opportunities for relevant professional development for school counseling program staff that is connected to their appropriate scope of work and extends their ability to implement the program with fidelity.
- ▶ Administrators use an annual evaluation system for school counseling program staff with metrics grounded in student growth and success to identify low and high performers, allowing for opportunities to develop low performing staff.
- ▶ Administrators allocate sufficient time for regularly scheduled meetings with school counselors and engage in decision making processes that support the implementation of the school counseling program.
- ▶ Administrators identify and allocate sufficient funds to ensure access to necessary resources for successful ongoing advising program implementation, according to TEA's recommended use of funds.

### Essential Actions

#### Essential Action 2.1

**Recruit, select, assign, induct, and retain highly-qualified school counseling program staff to lead the implementation of the individual planning system.**

- School counseling program leader(s) identify and cultivate potential candidates for future vacancies by creating an internal pipeline for interested district staff and designing a mentor experience for candidates who are in the process of becoming certified school counselors or advisors.
- School counseling program leader(s) coordinate with administrators to identify and partner with feeder institutions who can support the talent pipeline of new school counselors and advisors and obtain assistance from their regional support center in locating potential candidates.

- School counseling program leader(s) develop and implement a training experience for all new school counselors and advisors to appropriately onboard them to the individual planning system within the district’s school counseling program.
- All new and returning school counselors and advisors complete recent, high-quality training specific to their roles in effective advising service delivery on an annual basis.

### Essential Action 2.2

#### **Build school counseling program staff capacity and efficacy through frequent check-ins and evaluation cycles.**

- School counseling program staff evaluations are managed by a qualified campus leader who is well-versed in school counseling and advising responsibilities. Whenever possible, it is recommended that evaluations are completed by someone who has been a certified school counselor or is trained in effective advising and the Texas Model for Comprehensive School Counseling Programs.
- School counseling program staff performance and progress is routinely tracked over time using normed evaluation tools and processes along with student data.
- The frequency of check-ins and evaluation cycles are determined based on school counseling program needs, student short- and long-term outcomes, and district evaluation system guidance.

### Essential Action 2.3

#### **Build school counseling program staff knowledge and expertise through ongoing professional development that focuses on ensuring equal access as well as deepening advising skills to support student’s academic, career, and personal and social development and financial literacy.**

- School counseling program staff growth and learning is supported by professional development to successfully facilitate all students’ academic, career, personal and social development as well as financial literacy.
- School counseling program staff members engage in professional development on and off-campus, including, but not limited to the following:
  - ✓ Participating in professional associations
  - ✓ Visiting colleges and trade schools
  - ✓ Training on financial aid
  - ✓ Engaging with employers and employment opportunities in high-growth, high-demand occupations or industries
  - ✓ Continuing professional education on research of best practices from the field
  - ✓ Collaborating consistently across advising, counseling, and instructional staff for knowledge sharing opportunities and partnership
  - ✓ Receiving training on CTE programming and application, to include programs of study, work-based learning, CTE course offerings, industry recognized certification offerings, and Comprehensive Local Needs Assessment baseline data
  - ✓ Participating in mentorship experiences with a highly effective, experienced advisor in the district



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**3**

## Internal School Culture of Advising

### Description

A school culture of advising requires a universal commitment across the district to prepare all students for postsecondary success, which includes providing students with the necessary support to navigate their individual career and education pathways.

### District and Campus Commitments

- ▶ Administrators incorporate specific references to students' postsecondary success in college and career, including careers in the military, in district and campus vision, mission, and goals.
- ▶ Administrators develop policies and practices to ensure that all students receive equitable advising services, free from bias, within the individual planning system.
- ▶ Administrators require training on the fundamentals of advising in the annual professional development for all staff.
- ▶ Administrators promote the integration of advising-related student support and materials into core and elective curriculum and support consistent collaboration between teachers and school counselors and advisors.
- ▶ Administrators clearly and frequently communicate that effective advising is led by the school counseling program staff but is a shared responsibility among all campus staff members through varying assigned roles and responsibilities.
- ▶ Administrators audit the master schedule and embed specific advising related courses and interventions to align with student grade level expectations.

### Essential Actions

#### Essential Action 3.1

**Integrate the district's vision, mission, and goals into the individual planning system.**

- The vision, mission, and goals of the Individual Planning System are:
  - ✓ clearly defined and tied to student outcomes.
  - ✓ represented in the district's comprehensive school counseling program goals.
  - ✓ aligned to and communicated within campus and district vision, mission, and goals.
  - ✓ inclusive of the campus and district's implicit and explicit values, priorities, and needs.
- A clear communication plan for the vision, mission, and goals of the individual planning system is in place to ensure buy-in and commitment across the district.

### **Essential Action 3.2**

**Require training on the fundamentals of advising for all district staff who work directly with students and include additional required advising-related training for staff with specific advising support roles.**

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- District staff who work directly with students are informed and aware of their role as advising support partners.
- Campus staff complete training on the structure of the advising services, academic and career related milestones for students in each grade level, and resources available to students and families.
- Campus staff complete training on basic college and career readiness concepts.
- Campus staff complete training on ensuring equal access as it relates to postsecondary advising.
- Campus staff are able and expected to answer basic advising questions and incorporate basic advising concepts in non-traditional advising settings (the classroom, the field, etc.).
- Campus staff follow a multi-tiered system of student support and refer students as needed to specific and appropriate staff.
- Campus staff appropriately document and communicate advising-related conversations with students to school counselors and advisors thereby aiding the school counseling staff in effectively guiding a student's academic and career development and planning.
- Teachers collaborate with advising staff to include college and career readiness curriculum and instruction, which is aligned to student grade level expectations, in core content courses

### **Essential Action 3.3**

**Communicate programmatic updates and student metric tracking to staff and community partners throughout the year to facilitate shared understanding, responsibility, and urgency.**

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- Campus staff have appropriate access to relevant student metrics via the caseload management or student information system.
- School counseling program staff, along with teaching staff, consistently share out and celebrate student success in demonstrating college, career, and military readiness.
- School counseling program staff regularly update teachers on students' academic plan progress, identifying Tier 2 and 3 students for additional support.
- Campus staff analyze student advising program metrics and use data to inform curriculum and continued development of academic planning.



### **Essential Action 3.4**

**Engage all students in the individual planning system as key stakeholders throughout program development, delivery, and evaluation to support students in taking ownership over their postsecondary planning.**

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- All students have multiple opportunities to share their perspectives on their postsecondary planning wants and needs.
- All students have access to their progress data and information periodically throughout the year and upon request.
- School counseling program staff exhibits inclusivity in the advising process and frequently shares resources with all students.
- School counseling program staff employs a multi-tiered system of support to meet the individual needs of students.

### **Essential Action 3.5**

**Involve families and the community as key stakeholders throughout program development, delivery, and evaluation.**

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- Parents and caregivers have multiple opportunities to share their perspectives on students' wants and needs.
- Parents and caregivers have access to student progress data and information periodically throughout the year and upon request.
- School counseling program staff shares student resources and advising curriculum with parents and caregivers at entry points of the advising program within the overall individual planning system.





## Lever **4** Effective External Partnerships

### Description

Effective external partnerships are created by strategically selecting partners to fill gaps in district service delivery, provide specific content expertise, and support the individual planning system.

### District and Campus Commitments

- ▶ Administrators leverage consistent analysis of statewide and regional data, including local labor market information and college enrollment and persistence data, to best inform partnerships and course offerings.
- ▶ Administrators promote active engagement in partnerships with institutions of higher education within and outside of their region, regional employers, workforce boards, and community organizations.
- ▶ Administrators develop policies and practices to ensure that all external partners have the appropriate paperwork on file for access to necessary district facilities and are appropriately vetted to ensure the safety and security of all students.
- ▶ Administrators provide sufficient funds for contracted services and support and empower the school counseling program to collaborate with external partners to fill gaps in student service delivery.
- ▶ Administrators consider external partners part of the district's school counseling program staff and provide allowable data sharing to support provided services.

### Essential Actions

#### Essential Action 4.1

**Strategically select external partnerships to fill gaps in service delivery and provide intended student services.**

- Gaps in campus and district capacity to meet program goals have been identified, with special consideration for gaps in ability to serve all students equitably.
- Potential partners are selected based on their ability to address specific needs of students and families in the school community and/or fill identified gaps in the individual planning system.
- Potential partners are evaluated on the efficacy and efficiency of resources and impact on student outcomes.

## Essential Action 4.2

### Consistently manage external partnerships.

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- External partners have a contract and/or MOU in place that outlines:
  - ✓ A responsible party at the district level for program implementation, integration, and oversight
  - ✓ A responsible party at the partner entity who serves as the primary point of contact for advising program leadership in program planning, implementation, and oversight
  - ✓ Agreed upon time and space for partner entity to deliver services at the district
  - ✓ Alignment of milestones and outcomes tracking to district advising program goals and partner entity's program goals
  - ✓ Data-sharing and confidentiality agreement aligned to caseload management system that ensures tracking of all services at the student level by advising staff
  - ✓ Transition and connection of advising services from secondary education to post-secondary pathway
  - ✓ Training agreement to show that external partners who provide direct services to students have received recent high-quality training related to fundamentals of advising and their content area of expertise
- School counseling program leader(s) collects and maintains all contracts and/or MOUs in place with external partners.
- School counseling program leader(s) develops and maintains a database of all external partners, the points of contact, and summary of services provided that align to at least one of the effective advising content areas.

## Essential Action 4.3

### Consistently evaluate external partners against program goals.

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- External partners are required to track and share student-level milestone and outcomes data with district, campus, and school counseling program leadership to ensure progress towards program goals.
- Data shared by external partners is consistently entered into the caseload management system to provide a clear picture of the student's overall advising experience.
- School counseling program staff monitor contributions of external partners towards program goals as well as the student/family experience in partnership programs; staff provide frequent feedback to ensure students' needs are being met and there is a positive impact on student outcomes.
- Partnerships that prove to be ineffective or connected to low student outcomes are terminated after a performance improvement plan is unsuccessful.

#### Essential Action 4.4

### Communicate programmatic updates and student metric tracking to all external partners throughout the year to facilitate shared understanding, responsibility, and urgency.

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- All external partners have access to relevant student-level metrics with appropriate confidentiality and data-sharing agreements in place.
- External partners consistently share out information related to their content area of expertise to be disseminated to relevant stakeholders.
- School counseling program staff ensures all external partners communicate expected student outcomes to prevent duplication of services.
- School counseling program staff facilitates regularly scheduled in-person or virtual meetings which include school counselors, advisors, and all external partners to discuss student caseloads, share information, and develop a robust referral system that leads students to the appropriate resources.





## Lever **5** High Quality Advising Materials and Assessments

### Description

All students and their caregivers frequently engage with high-quality advising materials and assessments that support them in identifying postsecondary options as well as planning and preparing for postsecondary success.

### District and Campus Commitments

- ▶ Administrators recognize high-quality advising materials and assessments such as guidance curriculum, interest and aptitude assessments, career exploration resources, and milestone-tracking tools.
- ▶ Administrators require that the selection of advising materials and assessments meet high quality standards.
- ▶ Administrators acknowledge the needs of parents and families and address potential constraints in accessing materials and resources.
- ▶ Administrators allocate a sufficient and reasonable budget to invest in high-quality, research-based tools and resources for students and caregivers to support delivery of the individual planning system.
- ▶ Administrators ensure that the school counseling program staff have adequate time and training for fidelity of implementation of advising materials and assessments.

### Essential Actions

#### Essential Action 5.1

**Define a quality standard for materials, tools, and resources that support college, career, and military awareness, exploration, and preparation.**

- Advising materials and assessments are routinely assessed for non-negotiable characteristics such as user experience, basis in research, alignment to student outcomes, and integration of college and career.
- Materials, tools, and resources employed by external partnerships identified in Lever 1, Essential Action 5, are annually re-evaluated against the defined quality standards.
- Sub-standard resources are discontinued, and consistent messaging is enforced across the district.

### **Essential Action 5.2**

#### **Integrate materials into the individual planning system to support parent and family engagement.**

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- There is a continuum of parent and family touchpoints to communicate expectations for individual students aligned to grade level expectations.
- Parent and family engagement tools that meet the defined quality standards are identified and appropriately disseminated.
- Advising assessment results are provided and interpreted for parents and families.

### **Essential Action 5.3**

#### **Provide adequate time and training for fidelity of implementation.**

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- A lead point of contact, who develops a plan for implementation and monitors training and execution, is identified for all tools and resources.
- School counseling program staff and internal and external partners receive appropriate training on new tools and resources prior to implementation.
- Barriers to successful implementation, including school counseling program staff capacity, are assessed annually and appropriately addressed to maintain fidelity of implementation.

# Appendix

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## Key Terms:

**Comprehensive School Counseling Program:** A program defined in statute to be designed by a school counselor to include (1) a guidance curriculum to help students develop their full educational potential, including the student's interests and career objectives; (2) a responsive services component to intervene on behalf of any student whose immediate personal concerns or problems put the student's continued educational, career, personal, or social development at risk; (3) an individual planning system to guide a student as the student plans, monitors, and manages the student's own educational, career, personal, and social development; and (4) system support to support the efforts of teachers, staff, parents, and other members of the community in promoting the educational, career, personal, and social development of students. (TEC, §33.005).

**School Counseling Program Staff:** All internal staff who plan and implement the comprehensive school counseling program. This may include, but is not limited to, school counseling program leader(s), school counselors, and advisors.

**School Counseling Program Leader:** A lead school counselor or administrator who is responsible for planning, implementing, evaluating, and enhancing the district's comprehensive school counseling program and staff, which includes the district's individual planning system.

**School Counselor:** A certified professional as defined by the Texas Administrative Code §239.20 who is responsible for implementing a comprehensive school counseling program.

**Effective Advising:** A systematic approach to individual student planning that is managed by school counselors through a comprehensive school counseling program.

**Advisor:** A professional, who may or may not be a certified school counselor, who is responsible for systematic delivery of advising services to students.

**External Partner:** A partner in the Individual Planning System, not employed by the district, who may volunteer or provide contracted services to support the implementation of the individual planning system.

**Postsecondary:** A broad term, intended to capture each student's experience after completing high school, whether that be in an educational setting, the workforce, or both. Postsecondary may also include military service.

# Effective Advising Framework

To learn more, visit or contact:

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