



# ADVISING LEADERSHIP & INNOVATION INSTITUTE

Columbia, South Carolina

June 22-24, 2026



University Advising Center  
UNIVERSITY OF SOUTH CAROLINA

## Detailed Schedule

([View our “Schedule at a Glance” for a condensed version.](#))

### Day One: Monday, June 22, 2026

**8:15am: Check in & Breakfast**

**8:45am: Welcome, Institute Overview, & Tour of the University Advising Center**

**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 infrastructure.
- Developing a professional advising model: USC’s Case Study. Assessing and addressing institutional needs.
- Managing change and culture shifts.

**10:30am: Undergraduate Advising Models that Thrive: Keys to Success\***

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

- Clarifying Advisor roles: Academic, Program, and Resource Advisors
- Advisor positions and responsibilities, including academic interventions, 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.

Last updated 5/18/2026

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*\*Presenters will host extended time for a deeper dive into their topical area.*

- Shared oversight of advising to include both university-wide standardized equity (macro) and value the nuances of college, curriculum, and student needs (micro).

### **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 committees and meeting structures (university, college, staff meetings, committees, working groups)

### **1:45pm: Student Education\***

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

- A brief 15 minute overview of Student Education efforts at USC.
- Partnerships 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**  
**Austin Blackwell, USC Division of Information Technology**

- Role-based access and provisioning
- Advisor assignments
- 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

## **2:45pm: Caseload Management and Academic Intervention\***

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

- Academic interventions that work (scholarship risk, non-registered, faculty alerts, etc.)
- Global communications to students
- Assessment and advisor support
- Course Program of Study (CPoS) Title IV funding federal mandate

## **3:45pm: BREAK**

## **4:00pm: Breakout Session 1**

- Attendees choose one:
  - Keys to Success in an Advising Model** (Location: Advisor Training Room)
  - Transfer Advising** (Location: Close Hipp 352)
  - Advisor Training and Professional Development** (Location: Close Hipp 337)
  - Student Education** (Location: Close Hipp 350)
  - Advising Technology & AI frameworks** (Location: Close Hipp 304)
  - Caseload Management & Academic Intervention** (Location: Close Hipp 380)

## **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**

**9:15am- Exploratory Advising/Academic Coaching/Working with Undeclared Students\***

**Speakers:** *Keith Martin, Director of Exploratory Advising & Academic Coaching*  
*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 Migration 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.

**10:30am- Curriculum Management\***

**Speakers:** *Rachel Bradley, Senior Academic Program Coordinator*  
*Dr. Claire Robinson, Assistant Provost Undergraduate Advising*

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

**11:30am Lunch (provided)**

**1:00pm: Administrative Oversight\***

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

- Strategies for Managing Universal Advising Expectations in a Decentralized Model (MOUs, etc)
- Strategies for HR and Advising Partnerships
- Developing and Sustaining an Advisor Career Ladder
- Budget model/funding structure of advising
- Strategic planning and assessment

**2:15pm: BREAK**

## 2:30pm: Breakout Session 2

- Attendees choose one:
  - Transfer Advising** (Location: Advisor Training Room)
  - Advisor Training and Professional Development** (Location: Close Hipp 337)
  - Student Education** (Location: Close Hipp 350)
  - Advising Technology & AI frameworks** (Location: Close Hipp 304)
  - Caseload Management & Academic Intervention** (Location: Close Hipp 303)
  - Curriculum Management** (Location: Close Hipp 335)
  - Exploratory Advising/Academic Coaching/Undeclared** (Location: Close Hipp 380)
  - Administrative Oversight, Budget, Strategic Planning** (Location: Close Hipp 337)

## 3:45pm: Breakout Session 3

- Attendees choose one:
  - Advisor Training and Professional Development** (Location: Close Hipp 337)
  - Student Education** (Location: Close Hipp 350)
  - Advising Technology & AI frameworks** (Location: Close Hipp 304)
  - Caseload Management & Academic Intervention** (Location: Close Hipp 303)
  - Curriculum Management** (Location: Close Hipp 335)
  - Exploratory Advising/Academic Coaching/Undeclared** (Location: Close Hipp 380)
  - Administrative Oversight, Budget, Strategic Planning** (Location: Close Hipp 337)
  - Transfer Advising** (Advisor Training Room)
    - All SC Tech system schools are encouraged to attend this special breakout session, which includes a representative from the SC Tech System Office.

## 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 Olney (tolney@mailbox.sc.edu) with number of guests and preferred restaurant.*
  - [Cola's](#)
  - [Mr. Friendly's](#)

# Day Three: Wednesday, June 23, 2025

## Breakfast on your own

**8:15am-** Attendees bring luggage to Advisor Training Room

**8:30am-** Walk to College of Information & Communications (8-minute walk)

## **9:00am: College Visit #1**

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

Location: School of Journalism and Mass Communications, 318

- 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
- College Supervisors will cover topics such as: How does supervision of UAAs work? How does your college partner with the UAC? How has your college integrated AI into advising? What other unique practices has the college instituted to advance advising in the college?
- Advisor Voices and Perspectives

## **10:30am: College Visit #2**

- Choose 1:
  - **College of Education:** Wardlaw 110
    - Tour Gamecock EdQuarters and meet with advising leadership and academic advisors to learn how students are advised across Education academic programs.
    - College Supervisors will cover topics such as: How does supervision of UAAs work? How does your college partner with the UAC? How has your college integrated AI into advising? What other unique practices has the college instituted to advance advising in the college?
  - **College of Hospitality, Retail and Sport Management:** HRSM Welcome Center, Close Hipp First Floor
    - Tour the College of HRSM including the HRSM Welcome Center and J. Willard and Alice S. Marriott Foundation Culinary Laboratory. Meet with advising leadership and academic advisors in this college to learn how students are advised across HRSM academic programs.
    - College Supervisors will cover topics such as: How does supervision of UAAs work? How does your college partner with the UAC? How has your college integrated AI into advising? What other unique practices has the college instituted to advance advising in the college?

## **12:00pm: Lunch & Concluding Remarks**

- Institute Survey
- Review of Resources
  - 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.

## **1:30-5:00pm: Dedicated Team Time**

- Teams from the same campus will have an opportunity for dedicated planning to bring actionable ideas back to their institutions.
- Institute faculty will be available for post-institute consultations for interested attendees.
- Topics selected by attendees.