

## Providing Better Service—A Case Study

The University of Pittsburgh made the switch to an ‘assignment model’ during a restructuring of the campus immigration advising office which has evened out workloads and provided more professional development opportunities.

**H**OW DO YOU KNOW THAT YOUR INSTITUTION IS SERVING your international students and scholars in the best way possible? When it comes to large international student and scholar populations at institutions across the United States, various models exist to advise these populations on U.S. immigration regulations. Because each institution has a different international makeup, each immigration advising office must determine which office model will be ideal for its campus.

As an international adviser, you might wonder which models work and if you have ever considered trying a new model, perhaps you’d like to see what actually has happened in an office restructuring process.

The University of Pittsburgh’s Office of International Services (OIS) made the switch from a specialized advising model to an assignment model of immigration advising.

Immigration specialists Alan Johnson and Elizabeth Leibach learned through personal experience which advising model worked best for their institution.

Leibach says that there had been a lot of talk about changing the advising model for some time—at least a couple of years. “But we got serious about in fall 2003.”

Once the decision was made to implement the change in model—from the “specialized model to an “assignment model” [see sidebar, Advising Model Types]—training for all of the foreign student advisers was fast underway. The plan was to roll out the new model to the campus as a whole in January 2004.

“The rationale was that if someone were out of the office [in the specialized model]—especially for an extended period of time like a maternity leave—who is going to do the work?” says Leibach.

At one point, this did happen and the office hired a temp to learn visa regulations to replace an adviser

on extended leave but it took a substantial amount of time to train a temp. But that was several years ago. “These days I don’t know if we’d even take a risk of hiring a temp to learn an adviser’s job. There’s just too much at stake,” she says.

Moving the restructuring project forward was spearheaded by the office’s director, David Bryan Clubb. Fortunately, everyone supported changing the advising model, which made the transition easier than it would have been otherwise—and it contributed to the change being done in only a few months.

“Everyone was on board because people saw it as increasing their professional development. Learning everything from lots of visa categories makes us more marketable as professionals if we want to seek other opportunities one day or be on the path to a director position,” says Leibach.

One reason for changing from the specialized advising model to the assignment model was that advisers’ caseloads differed a great deal depending on the type of visa classifications they dealt with. If an institution has more student visa and few scholar visas, the adviser working with scholars has a much lighter workload. At the University of Pittsburgh, before the advising model switched to the assignment model, the situation was reversed—Pitt has a large number of scholars to counsel.



## Advising Model Types

### Specialized Advising

The “specialized” model employs advisers who only advise on specific immigration classifications. Using this model, you would find an international office that has a “J-1 Adviser,” “F-1 Adviser,” “H-1B Adviser,” etc.

### Assignment Advising

In contrast, is the “assignment” model where everyone is commonly cross-trained on all visa classifications. The advisers are then assigned to handle all visa-related issues for specific colleges or departments within the university.

### No Assignment Advising

With a “no assignment” model, advisers may be cross-trained on the various visa classifications; however the adviser has no assigned group or clientele, and a student or scholar may speak to several different advisers throughout their academic pursuits.

Leibach says that while working under the old system (the specialized model) there was an equity issue. Her case load was much heavier than other advisers. “H and J is heavy for scholars and Pitt has a large community of scholars,” explains Leibach. “After getting trained on doing work for students, I realized there is just no comparison. It’s more complicated for scholars.”

After the change, Leibach’s individual workload decreased while the workload of other advisers increased somewhat. The outcome was that the entire office workload was more equally distributed among all advisers. After the transition, the office also hired one more adviser.

Prior to working at Pitt, Johnson worked for a slightly larger, private institution where the no assignment model was utilized for advising. After comparing all three models of advising, Johnson prefers the assignment model of advising to both the no assign-

ment model and the specialized model.

“The no assignment advising model is not efficient in my experience,” says Johnson. “As an adviser, it is impossible to learn about every school’s curriculum. If you are assigned to a department or school, you build relationships with people in the departments. Then when someone asks you a question, you already have a knowledge base to work from and can answer quickly. It’s just more efficient.”

### How They Did It: Cross-Training the Specialized Advisers

The training process in the office restructuring focused on cross-training advisers on all visa classifications; advisers of a specialized knowledge area would train other advisers (i.e., H-1B adviser training on the H-1B processes to the F-1 and J-1 advisers). The process included internal workshops, a quality control process, a shared database network, and the creation of various training tools.

### Workshops

Training sessions were designed as half-day workshops that could fit into the schedules of the advising staff. Prior to each workshop, each adviser was given a required reading assignment from the *NAFSA Adviser’s Manual*. Each adviser was asked to prepare workshop materials in accordance with his or her specialized knowledge. In addition to the steps mentioned above, and whenever possible, advisers were also sent to NAFSA conferences to attend various training workshops to build upon the knowledge from the internal cross-training.

### Shared Information

Along with the internal workshops, other training guidelines were implemented. Since various advisers were responsible for information on the same topic, the office produced a policies and procedures manual. The manual illustrated how to internally process casework and to record any internal decisions made by the advisers and director in situations where the regulations may leave room for interpretation. Both the recorded processes and internal decisions created a foundation for more consistent advising and dissemination of immigration regulations.

### Quality Control

Quality control (QC) was another aspect that was integral to the crossing-training process. Following the workshops, when advisers began to process immigration documents for their new area of expertise, the adviser who was considered most knowledgeable in a specific immigration classification would review the work of other advisers via the QC process. Checklists were generated to assist advisers on what steps and/or documents were needed to process paperwork for submission to SEVIS, USCIS or any other government agency. Once

## Benefits of the Assignment Advising Model

**RELATIONSHIP BUILDING.** In an office that utilizes an assignment model, an adviser will begin to build relationships with their student or scholar as well as the department or scholar administrator.

**EDUCATION.** Learn intricate details about how each visa classification interrelates

**WALK-IN ADVISING.** Questions regarding different classifications can be answered by all advisers. If one adviser is on extended leave, the university will not lose time and energy in having to train someone else temporarily.

**PROFESSIONAL DEVELOPMENT.** Advisers feel more confident in exploring lesser known areas of immigration and find more opportunities for advancement in their careers

**TRAINING NEW HIRES.** Because the model requires development of an ongoing training system, it can make training new hires more streamlined and efficient.

the assigned adviser was confident that the checklist had been followed, the adviser who had provided the training in that particular visa classification reviewed the work for accuracy.

Without a doubt, the quality control part of training was the most valuable part of the process. “You can tell people the process until they are blue in the face. Until people do it on their own and have some-

one check it and point out their errors, they haven’t really learned yet. They have to learn by doing,” explains Leibach.

### *Dividing the Casework*

Once the training had progressed and the advisers had become cross-trained, it was time to divide up the workload among them. From using the internal database, in this case i1440, a query was made of all casework ac-

cording to F-1 Students, J-1 Students, J-1 Scholars, H-1B and permanent residency cases. The work was calculated so that it could be evenly distributed among all advisers. Each adviser was assigned to specific departments and schools at the university based upon these calculations. Once this was completed, the advisers exchanged administrative contact information for these departments (i.e., Mary Smith is the F-1 contact within the Department of Chemistry; John Johnson is the J-1 Scholar and H-1B contact for the Department of Surgery). (This information was generally in the form of e-mail addresses and phone numbers.)

### *Communication, Training, and Outreach*

While advisers were busy training themselves on the various visa classifications, the director had already begun communicating to deans and chairs throughout the university about this new structure. Departments were informed that their schools and departments were going to be assigned one immigration adviser rather than having to contact a different adviser for each visa classification. In addition, the advisers began contacting the departments they were assigned to and introduced themselves as their new contact person in the advising office. Finally, the school and department assignments were placed on the OIS Web site and distributed among students and scholars during the orientation sessions.

### **Campus Feedback**

The overall tenor of the feedback from the university community was positive. With all advisers having training on all visa classifications, each adviser became a one stop shop for their assigned schools and departments.

“Departments liked having one person to go to for concerns,” says Leibach. “This way, each adviser gets to know the curriculum of the school that they are assigned to and their nuances.”

## Before Taking the Advising Restructuring Plunge

**GET BUY-IN.** If you need to, get the gold stamp from higher level university administrators before restructuring begins.

**EVALUATE RESOURCE.** Do you have the funds to implement a whole office restructure? Will you need to hire more advisers?

**DETERMINE WHO’S ON BOARD.** Find out if current staff members are willing to undergo training and are enthusiastic about changing the modus operandi. If they are not, evaluate whether or not it is worth it to make the change and if you do it without staff support, how long the transition will take for it to be effective under the circumstances.

**CONSIDER THE SIZE OF YOUR INSTITUTION.** The larger the institution is, the more complicated an international advising office will be. If a campus is small and deals mainly with students and only rarely encounters international scholar visa issues, an assignment model may not be necessary.

“Administrators like it because they know who to contact all the time,” notes Johnson. For example, if an administrator is dealing with two students but they each have different visa questions, under the specialized model they would have to call two people to get answers, whereas with the assignment model they call one person to get both questions answered at once.

While the assignment model of advising proved to be an excellent fit for the University of Pittsburgh, no advising model is perfect. Some challenges do exist in the assignment model despite its general effectiveness:

1. Depending on the institutions, equitable division of labor can be hard to achieve because some schools within the university have enrollments that are much larger than others.

2. The fast pace of changing regulations can be challenging if all advisers aren’t committed to staying abreast of developments. With the assignment model, each adviser must devote time to reading in order to remain knowledgeable on changing immigration regulations.

3. Adequate staffing resources must be in place in order for the model to be successful.

4. Internal policies must be developed to ensure that all advisers will provide consistent answers to specific immigration questions. Advisers need to maintain open communication and monitor policies on an ongoing basis to maintain uniformity on policies.

Overall, both Leibach and Johnson prefer the assignment model of advising over both the no assignment model and the spe-

cialized model—and for the University of Pittsburgh, it seems to be the best solution.

The number one advantage of the assignment model is increased communication, according to Johnson. “The more you can serve the clientele—in our case, students and scholars—the more effective an office is. And the more the university appreciates what you do.” **IE**

This article is based on a session at the 2005 biregional (regions VIII and X) conference for NAFSA held in Atlantic City, New Jersey. The presenters were **ALAN JOHNSON**, a former immigration specialist at the University of Pittsburgh who is currently an immigration specialist at the University of Pittsburgh Medical Center and **ELIZABETH LEIBACH**, an immigration specialist at the University of Pittsburgh. **ELAINA LOVELAND** is managing editor of *IE*.

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