

A Data-People-Theory Approach to Enhancing Student Advising: Findings from a Multi-institution Project

Rachel Maxwell¹, Janice Kay^{1,2}, Lisa Dawson³, Peter Fitch⁴, David Gilani⁵, Sarah Graham⁶, Nicky King⁷, Rachel Lucas⁸, Michaela O'Brien⁹, Claire V.S. Pike¹⁰, Emma Rowsell¹¹, Richard Stock^{8,4}, Nicola Watchman Smith¹², Kathryn Woods⁴

¹ Kortext Ltd, ² Higher Futures, ³ University of Edinburgh, ⁴ University College London, ⁵ Middlesex University, ⁶ Newcastle University, ⁷ University of Exeter, ⁸ University of Essex, ⁹ University of Westminster, ¹⁰ University of East Anglia, ¹¹ University of Surrey, ¹² Teesside University

ABSTRACT

Student advising is gaining prominence with senior university staff in UK Higher Education, driven by the need to retain students and support successful outcomes across diverse groups. Drawing on initial findings from a cross-institutional experiential project, the paper explores institutional enhancement activities related to student advising through a data-people-theory model. Using purposive sampling, participants were invited to join the research because the first and second authors were aware that their institutions were in the process of or about to undergo, institution-wide projects to enhance advising.

The project initially sought to explore whether McVitty and Maxwell's (2024) data-people-theory model could provide a consistent framework for better understanding varied approaches to advising activity. An in-depth overview of the model and its constituent parts is provided, enabling readers to consider how they might use this same lens at their own institutions. Typical use cases include benchmarking existing advising systems and practices to better understand how their input components interact. Gaps in provision can be surfaced through an intentional consideration of the components and their interplay. The model can also be used to articulate a future desired state for advising that enhances student success.

Project findings offer institutions a flexible framework for reviewing and enhancing student advising, drawing conclusions that can help other institutions consider how to proceed. A revised version of the data-people-theory model is also presented.

KEYWORDS

Student advising; Personal tutoring; Engagement analytics; Engagement data; Student success; Academic advising; Quality enhancement

Introduction

In his pre-appointment hearing for the position of Chair of the Office for Students (OfS), Professor Edward Peck, then VC at Nottingham Trent University and Higher Education

Student Support Champion, noted that 'student support is as important to many students as the academic input they receive' (House of Commons Education Committee, 2025).

Effective student support is increasingly at the top of the student experience agenda (McGill et al., 2020). However, it is challenging to identify a single consistent approach as support varies within and between institutions and by regulatory approach.

In England, the regulatory and legal burdens around advising are increasing. The proposed Integrated Quality Model from the OfS will reshape both the Teaching Excellence Framework and Regulatory Condition B3 – the minimum quality threshold designed to prevent poor student outcomes in England. Alongside this is the drive for universities to comprehensively adopt the University Mental Health Charter. In Scotland, supporting student success is a core pillar of the Tertiary Quality Enhancement Framework.

Within an institution, staff undertake different roles to fulfil different support functions or a mix of functions: academic, personal, pastoral, professional and specialist – the latter including employability, finance, disability support etc. While approaches to student support legitimately vary according to an institution's purpose and mission (van Pletzen et al., 2021), inconsistent delivery within an institution often means inequity for individual students, particularly those from marginalised groups.

Inconsistencies and inequities can arise from different priorities and practices at a local level. These reflect variances in staff skills, confidence and ability in the role and with the support available. Concerns that academic staff may not be best equipped to advise students on non-academic matters, or feel unprepared to provide specialist advice (e.g. disability, mental health), are not new (Lloyd-Jones and Smith 1954, cited in Habley 1994). However, current financial challenges across the sector are prompting institutions to consider how they respond whilst simultaneously ensuring the student experience is not eroded and remains a strategic priority. Against this backdrop, the need to improve student advising and ensure it works for students becomes unarguable.

Background to the Student Advising Project

In 2024, Wonkhe (a UK HE policy analysis platform), Solutionpath (the edtech company that created what is now the Kortext stream engagement analytics platform) and Kortext (edtech provider of data, content and AI solutions for HE) co-published a whitepaper outlining the findings from research with seven higher education institutions in the process of developing their academic support system. The whitepaper concluded that 'there is no perfect or "best practice" model of academic support' and that it is the 'capability [of institutions] to describe, evaluate and enhance their academic support system' that matters most (McVitty & Maxwell, 2024).

The whitepaper proposed that academic support systems typically comprise three elements: (1) the people who undertake academic support activity; (2) relevant data; and (3) the institutional 'theory' that underpins how the academic support system is intended to function. The resulting model for student advising has, at its core, student success,

reflecting the authors' conclusions that for an advising system to be impactful, it needs to intentionally comprise all three elements:

Without any one of these elements the system is unlikely to be impactful because it will lack either personal interactions, a framework to orient those relationships or data to inform and enhance them (McVitty & Maxwell, 2024).

Having commissioned the academic support whitepaper, Kortext were keen to better understand what works in student advising. The Student Advising Project (SAP) was established to test whether the theoretical Data-People-Theory (DPT) model has value in helping institutions articulate their approach to student advising. Secondary project aims included exploring whether the model brings consistency to the learner experience across academic, support and welfare structures within an institution and reduces structural barriers to success, such as pressures on staff time, inadequate training and underfunding (Kyte et al., 2023). This article seeks to address the first of these questions: does the DPT model provide a useful lens for cross-institutional comparisons of student advising?

Participant overview

Based on the first and second authors' experiences of working with multiple UK higher education institutions, a purposive sampling approach was adopted when inviting institutional participation. Senior colleagues (the remaining co-authors) from ten UK higher education institutions were invited to collaborate, based on their roles in driving recent or in-progress institutional revisions to student advising. We sought to draw on these participants' strategic and holistic understanding of recent institution-wide revisions to student advising, while capturing insights from universities that employed different approaches to using student engagement data in advising. It was expected that their experiences overseeing these university-wide enhancements would provide a holistic understanding and strategic relevance to the project. Collaborative meetings were held monthly over an 8-month period during the initial project phase reported in this paper. While a mix of institution types were represented (Table 1), we intentionally selected institutions known to employ different approaches to using student engagement data in the advising sphere (Table 2).

Student numbers			Type						Mission Group					Geographic Location	
10,000	10-15,000	>15,000	Campus	City	Public	Research	Traditional	Ancient	Russell Group	Million Plus	Research Plus	Post-1992	University Alliance	England	Scotland
1	5	4	6	4	10	6	2	1	4	0	1	3	3	9	1

Table 1: Overview of participant university characteristics

Who undertakes this role?			Terminology for advisors					Approach		Relationship with Kortext			
Academics only	PS teams only	Academics and PS teams	Academic Advisor/Adviser	Student Success Coach	Pastoral Mentor	Student Advisor/Adviser	Personal (Academic) Tutor	Coaching	Traditional PT/PAT model	Kortext stream (analytics) client	Kortext stream PoC complete	User of other Kortext products	No commercial arrangement
0	1+1n ^a	8+1o ^a	3	1n ^a	1	3 ^b	2+1o ^a	3+1n ^a	6+1o ^a	4	1	4	1

^a 'n' or 'o' is used where a university is transitioning from one model to another: o = old model, n = new model

^b at one institution, Student Advisors are a Professional Services role providing pastoral support and are supplemented by (academic) Cohort Leads.

Table 2: Overview of advising within participant institutions and commercial relationship to Kortext

A data-people-theory model for student advising

McVitty and Maxwell's DPT model surfaced three aspects of a student advising system (Figure 1), while recognising that the specific details of how an institution arranges, defines and structures those aspects will vary significantly. Influences shaping the system include, but are not limited to, the institutional vision and mission, the size and composition of the student body, allocated resources for advising, the structure and location of advising personnel, and the use of any associated analytics or other technologies designed to support student success.

Establishing these foundational 'inputs' further makes it easier for users to understand the practical implications of how these component parts interact and to identify any gaps.

Data

The types of data available to institutions to support student advising include information about the students themselves. Both structural information about how the student is defined in respect to university structures (course, study mode, year of study, etc.) and specific details about who the students are (age, ethnicity, first-generation, international) are useful in this regard. Other relevant data sources include data on student touchpoints with their learning, e.g., attendance, use of library and online resources, VLE access, etc.

Often this information is combined and surfaced within analytics software that captures 'educationally purposeful activity' (Kuh et al., 2008). Learner analytics are effective at identifying students at risk of underperforming in their studies (Foster & Siddle, 2019; Rimmington, 2024; Summers, 2024), enabling institutions to act early to support student retention. Learner analytics impact institutional continuation and completion metrics and identify a positive relationship between student engagement and attainment.

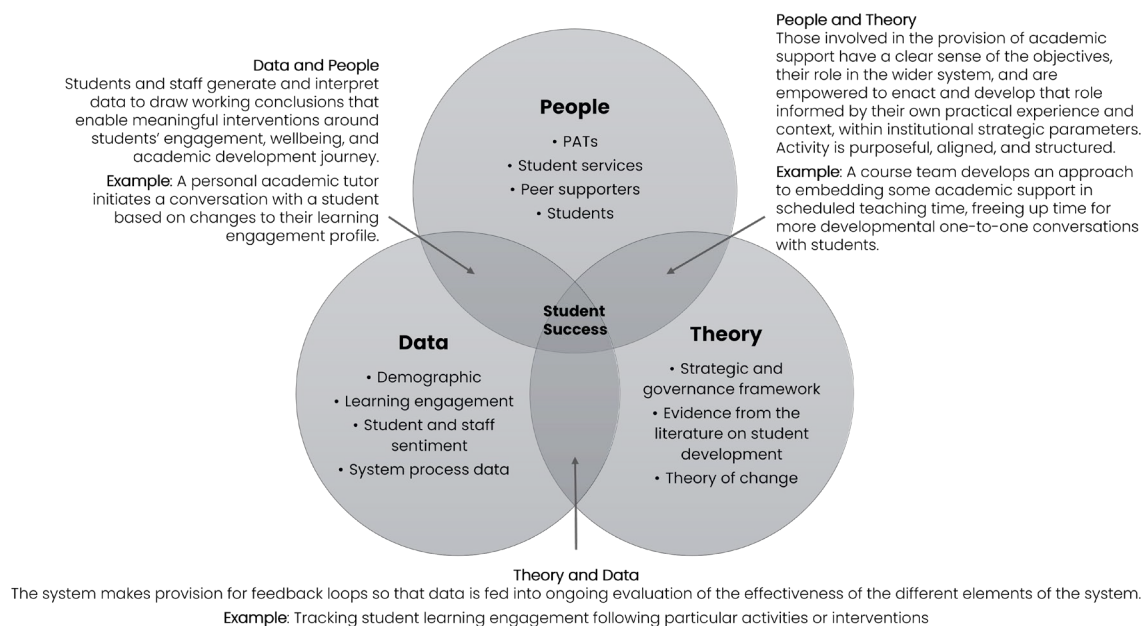


Figure 1: Data-People-Theory model (McVitty & Maxwell, 2024).

Student advising technologies exist in multiple forms, from 'home-made' spreadsheets that track student interactions through to in-house web-based tools (Feghali et al., 2011) and commercial off-the-shelf products, including Kortext stream, Jisc's learning analytics service, Civitas Learning, and IntelliBoard.

People

Multiple people are involved in student advising across an institution. The most obvious stakeholders are the individual student beneficiaries of an advising system. Students also serve as one of the groups providing advising support, e.g., as peer mentors, supporters, or student callers.

Staff who undertake student advising range from educators providing academic input as discipline educators to the traditional Personal (Academic) Tutoring model, where the same staff wear a different hat and are responsible for a subset of students on their course.

As this article shows, academic advising is being increasingly professionalised, with institutions recruiting specialist staff to undertake the advising role. These staff may be located within and funded by academic units such as faculties or schools, or centrally managed and funded.

Theory

When articulating the findings of their research, McVitty and Maxwell (2024) defined 'theory' in this context as those operational documents, policies, frameworks and activities that underpin how the system is intended to work. They go on to say that

‘These “theories” might be tacit and held by lots of different individuals, or they might be explicitly articulated as strategy, policy and a common framework and language for student development. The latter, needless to say, is more likely to drive a functional system!’ (p. 4)

For the purposes of this paper, therefore, ‘theory’ should be interpreted as comprising everything that articulates how the university is intentionally building a system around student advising. More broadly, as Figure 2 shows, the conceptual framework for advising informs all three inputs. Making this context explicit helps those leading advising enhancement activities better frame their institutional context for advising, within a clear understanding of the institutional mission and goals for student advising more broadly (Habley, 2005).

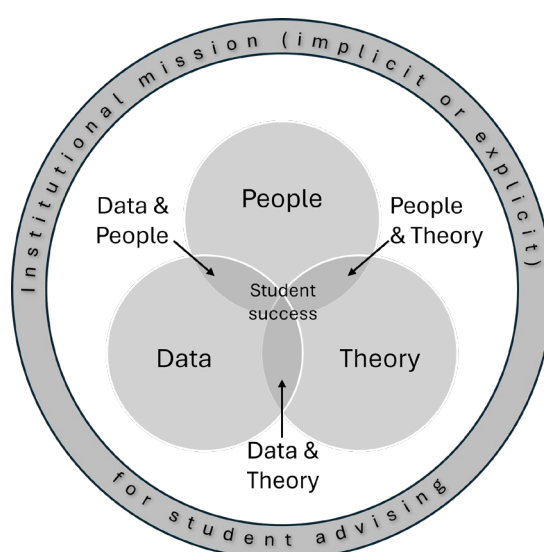


Figure 2: Revised version of the Data-People-Theory model

Student success at the heart of the model

‘Student success’ sits at the heart of the DPT model for a simple reason. If, as Peck suggests, students are as interested in the academic support on offer as in the disciplinary input, then academic support has a key part to play in student outcomes. ‘Student success’, viewed both as the quality of the student experience and the end goal of a successful advising system, for the purposes of the project would ultimately be evidenced through measurable improvements in sector-level metrics around student continuation and satisfaction.

Of relevance here are the National Student Survey indicators associated with the relevant provisions of the Teaching Excellence Framework (TEF) assessment, run by the OfS, the regulator for higher education in England. Feature 5 of the TEF covers the learning environment and the provision of academic support, with the latter measured by responses to the academic support questions in the National Student Survey (NSS) of final-year undergraduate students (Office for Students 2022).

The implication of situating student success as the goal of any student advising system is, as McVitty and Maxwell (2024) point out, that ‘academic support strategies ... need to be intentional about positioning student success as the core purpose of academic support’. They continue:

without any one of these elements [data, people or theory], the system is unlikely to be impactful because it will lack either personal interactions, a framework to orient those relationships, or data to inform and enhance them.
(p.4)

Understanding the DPT overlaps

In addition to concluding that each element of the DPT model is essential to the functional effectiveness of an institution’s academic support system, McVitty and Maxwell (2024) identified that

it is also the interactions between the different elements of the system that generate knowledge about the system and create space for targeted enhancement activity (p.4).

Explanations for, and examples of, activities that might sit in each of the overlaps are provided in McVitty and Maxwell’s original research and shown in Figure 1.

The three core aspects of the DPT model function as inputs into any student advising system. However, unless those inputs interact, they are siloed, operationally divorced from the rest of the system, and act independently rather than being aligned around the purpose of enhancing student success.

It is therefore the overlaps that bring the model to life and create meaning within the system. The overlaps also identify the implications for practice within an institution:

- Does the *data* help the *people* know which students might need a supportive conversation?
- Do the *people* know what is expected of them (the institutional ‘*theory*’ for student advising) and understand how their actions contribute to operationalising that theory?
- Are institutions collecting the right *data* to support the institution to understand whether the *theory* is working?
- Collectively, is the system as a whole working effectively for the individual students it seeks to serve and supporting their academic and personal success?

As a practical example, data is seen as essential for institutions to make evidence-informed decisions about what action to take. However, data only derives meaning and value when it is situated and contextualised within a wider theoretical or strategic understanding of academic support, and when staff involved in student advising have access to the ‘right’ data to help them undertake advising activity aligned with their strategic theory of advising and support. These connections are recognised in research from TASO (Transforming

Access and Student Outcomes in Higher Education) that concluded that even where relevant data drive wellbeing support for students, it is no match for the human connection:

*While learning analytics offer opportunities to reach more students, **the data** underpinning these systems **must be** meaningful, monitored and **accompanied by relationship building activities between staff and the students who need the most help** (emphasis added) (Khan, 2026) and see further (Kozman et al., 2026).*

Applying the data-people-theory model in practice

Prior to the student advising project, the DPT model had been presented in the original whitepaper. Two of the authors had utilised it during a conference workshop, presenting an example of how the model works at one English university. Workshop participants were then invited to explore what the model would highlight in their own advising contexts (Maxwell & Gilani, 2025).

When planning the student advising project, it was anticipated that the DPT model could provide a consistent and structured opportunity at the macro-level for participants to articulate their institutional approaches to student advising (our preferred term) given the complex and multi-faceted nature of staff-student interactions that support student learning (Grey & Osborne, 2018).

To test this assumption and, by way of introducing the project and participants to each other, colleagues created an institution-specific slide of the DPT model to reflect on the different components of their student advising ecosystem and to present this contextual overview to the rest of the project team.

No additional guidance beyond that in the original whitepaper was provided to participants on how to complete the model, although the completed conference version was presented as an example. Participants were invited to complete the model in a way appropriate to their institutional advising ecosystem and reflective of any enhancement activity underway.

As institutional leaders of student advising enhancement activities, participants descriptively populated the model by reflecting on and assessing the effectiveness of current practice, sourcing additional information from colleagues where required. For some institutions, the model was applied retrospectively to a newly revised approach to student advising, whereas for others, it helped them situate and explain planned activities across the three elements. Participants also reported that the model helped inform some formal processes or provoke different ways of thinking.

Examples of the information placed in each of the circles and in the overlaps, drawn from all participant institutions, are shown in Table 3:

Table 3: Examples of information placed in the DPT circles and overlaps by project participants

Data	People	Theory
Learner analytics dashboards using engagement data e.g. attendance, VLE engagement, submissions, alongside survey data (e.g. pre-arrival) Differentiated dashboards – engagement, apprenticeships Formative and summative assessment data including extension requests, resit info, MCs/ECs and adjustment requirements Individual digital advising record/learning plan Staff / self-referrals	Students: Student beneficiaries, peer mentors, callers Academic: personal (academic) tutors, apprenticeship coaches, cohort leads, advisors, teaching teams Student Lifecycle Management Group Specialised roles: Success Coaches, Student Journey Advisors, Pastoral Mentors, Wellbeing Advisors, academic skills tutors, academic librarians Student Union: advice centre	Coaching approaches +/- nudge theory Belonging and mattering prominent in induction and transition Comprehensive policy suite (engagement, advising, interventions & outreach) Compassionate and transformative pedagogies Prior evaluations (support to progress, support to succeed) Data-informed approach – early identification of risk supports retention / early intervention Learning from schools/FE Often captured in an institutional theory of change that frames student advising at the institution
Data and People		
Data-triggered outreach using analytics dashboards or staff/student referrals aligned to policies and routine schedules to flag concerns, initiate (early) contact and pre-empt issues through proactive risk-based escalation using identified and structured referral routes Appropriate de-escalation without removing all support Automated communications enabling multiple, personalised interventions where risk is greatest Senior leaders and teams review dashboards to track in-year metrics and impact Survey data shared with relevant people at the start of the year, with overviews for students Early engagement with support interventions Personalised goal setting		
People and Theory		
Training/framing to ensure compassionate, inclusive conversations, strengthen practice and provide layered support for students based on clear referral routes and pathways Enhanced consistency from role specialisation (role descriptors and defined outreach expectations) clarifies responsibilities and approach, provides support to staff, and facilitates agile deployment to meet demand Professionalisation of academic support frees up academic time and removes barriers for academics Duty of care training and scaffolded wellbeing interventions Clear messaging and documentation to support practice		

Embedded peer support: communities of practice, tutor networks supported by professional accreditation (e.g. UKAT)

Single entry point for student information and advice

Embedded learning enhancement within library

Aim for meaningful PT: students understand it, stakeholders see benefit

Relevant data used to enable better decisions about student support needs and prevent students getting lost in the system

Theory and Data

Evaluation frameworks combine quantitative dashboards and qualitative feedback

Piloting across faculties with inbuilt feedback loops

Oversight groups review use of analytics and analysis of impact of activity on associated KPIs.

Oversight groups also use evidence loops to identify gaps and iterate models accordingly

Governance routes used to monitor trends and initiate enhancement activity and projects (QA, Teaching Committees, Senate)

Plan for engagement analytics

Timely response to changing patterns of engagement

Table 4: Examples of information placed in the DPT circles and overlaps by project participants

Learning along the way

As an exploratory project, participants agreed in the early discussions that it would be valuable to adopt an experiential approach, capturing learning during the project meetings. Initial reflections following all DPT presentations were sought in response to four prompts, selected in advance by the first two authors, to help structure the responses. Responses were captured anonymously in a collaborative, open online space using [Lucidchart](#) and are summarised in Table 4.

Further discussion on the themes that emerged from project meetings will be explored in a future article.

Identified value in using the data-people-theory model

The DPT model was initially envisaged by the first two authors as a useful means for participants to articulate institutional approaches to student advising. In practice, however, the utilisation of the DPT model went beyond simply providing a means by which institutions could factually articulate their individual approaches to student advising. Rather, the model provided both a useful lens through which participants could consider and reflect upon work to enhance student advising within their institution, and enabled meaningful and consistent discussions *between* institutions that deploy different

approaches to each of the three core elements – data, people and theory. Adoption of the DPT approach enabled these different perspectives to come together and ensured multiple

Focus	Key themes
Principles of student advising	Student advising should be: student-centred and outcome-focused; co-created with students and stakeholders; have a clear structure and role clarity; be proactive, provide expert support with dedicated time and CPD; be grounded in transformative education (inclusive, authentic, compassionate); deliver inclusive practice for diverse communities; operate a tiered model with clear first contact and specialist escalation; be fully and realistically costed.
Challenges and pitfalls to consider when revising advising	Fragmented or insufficient technology (no integrated dashboards); an inconsistent student experience in devolved models due to competing staff demands, change-management challenges, and poor service awareness; where students are unclear on advising purpose/scope; where there is growth in complex student needs increasing workload or the wider support ecosystem is difficult to navigate.
What defines a good advising experience?	Trusted relationships; timely, responsive support; personalised and proactive/reactive advising; availability of local and contextual expertise; continuity of care (handover not handoff, with follow-up); clear purpose and specificity in outreach; clarity of expectations for both advisor and student.
Redesign recommendations – what would you do differently?	Co-create the advising model with students (starting from a blank page where helpful); ensure role clarity and boundaries across academic, peer, and professional services; simplify institutional signposting; design for flexibility with a minimum entitlement/expectation; fully cost and align the model to available resources; reduce complexity and reliance on individual capacity; implement simpler, integrated dashboards for triage and follow-up; ensure broad cross-service coordination (“many voices in the room”).

Table 5: Summary of experiential findings recorded in Lucidchart

voices could be heard. Consequently, we posit that the model can facilitate shared understanding and transfer of learning across the sector.

As a mechanism for baselining the status quo before identifying areas for future enhancement, the DPT model was found to be a valuable way for institutional leaders to intentionally consider the component parts of an effective advising system. In particular, the individual data, people, and theory ‘circles’ help capture what exists and prompt institutions to identify what might be missing from the current approach. As an example, one participant reported via the Data-People overlap that the activity surfaced gaps in relevant data and identified that there was no shared or agreed way of storing PAT records or monitoring PAT engagement with tutees.

Another participant explained how the model has directly led to enhancement activity within their institution after recognising how separated the data was from the people who need to use it:

... it seems to me that we have failed to factor in the importance of gleaning insights from the data to enable action in a timely way. ... [T]he model showed me one of the main weaknesses in our system – that we provide academic staff with a wealth of data, but with minimal insights from / analysis of that data that could help them identify which students need additional support, when and why. For this reason, the data – people – theory model was instrumental in helping us identify where we could improve our systems.

Some challenges with the process were identified in discussions with participants following work to explore the emergent themes from the different DPT presentations. When asked whether the summary resonated, one participant observed that

Different institutions are at different levels or stages of implementation. So for some people, what you've just laid out is the operational reality and for some institutions it is the objective and that perhaps is a spectrum we want to articulate as well in terms of the current progress of the implementation.

AI was also used to provide a first-pass review of the differences between the presentations. Raw counts and normalised heat maps of the number of times a participant referenced a particular theme were generated and shared with participants for discussion. Unlike the high level of agreement among participants with identified themes, heat maps based on differences arising from how the DPT model was used to articulate approaches to student advising were perceived to be problematic and thus rejected:

The question that occurs to me is whether this really reflects the state of play in those institutions or whether it reflects the way that we happened to capture and present on this occasion. And whether we could have presented the same underlying facts using slightly different vocabulary, a different set of keywords and then would have got more mentions in these categories for the same underlying story. So I wonder if this is capturing a quirk of presentation, rather than it being a reflection of the absolute state of play in these universities in a deep way.

Ultimately, project participants concluded that the DPT model is useful in providing a shared framework for different types of advising conversations between and within institutions, for intentionally baselining existing activity before identifying areas for enhancement, and for articulating an intended future state. It should be recognised that articulating the model through this lens may require presenting a system in a slightly different way than any individual institution might have chosen, to enable consistent comparisons between systems.

Conclusions

Fundamentally, student advising is designed to further academic success for all students, whether by maximising 'good' degree outcomes or by identifying risks to continuation and completion at the point when students first start disengaging from their studies or when

they take longer than expected to develop productive learning behaviours. Data on student participation in their learning has an important role to play in supporting an effective and efficient approach to advising, enabling staff at the frontline of advising to understand better how their work supports institutional objectives for student success.

Through an experiential approach, the DPT model has been shown to offer a valuable lens for institutions to articulate their approach to student advising, providing meaningful points of comparison across the sector. However, any enhancement of advising activities would benefit from being situated within a broader understanding of the institutional aims and purposes of academic advising.

Returning to our starting point, if Peck's statement that advising is becoming as important to students as academic input is to be realised in practice, then a fundamental shift in how advising activity is delivered within universities is required. Up to this point, advising has been seen as supplementary, less structured and often less visible within an institution. An evolution in how student advising is viewed is needed to enhance visibility and prominence internally. Support initiatives should become further integrated as an equal aspect of the holistic student experience rather than simply existing as fallback options. This means institutions must make support more accessible, more conspicuous, and more actively embedded within the fabric of everyday academic life.

Having a student advising system that is fit for purpose needs to be on the agenda of all institutions. In a time when notions of 'the student experience' are now seen to be more about 'student experiences' plural, when there are valid questions about the use of the terms 'traditional' and 'non-traditional' student (Briggs, 2025) and when the ways in which technology supports student advising are transforming, it is timely to take stock and ask some serious questions about the appropriateness of universities' approach to advising. The institutions participating in our project have intentionally asked or are in the process of asking themselves these very questions. We strongly endorse Professor Peck's view that the need for student support has never been greater, but that institutions need to be clearer on the purpose of student support, its design and delivery.

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About the Author/s

Dr Rachel Maxwell (PhD PFHEA) is Director for Sector Engagement and Academic Research at Kortext, utilising her experience as a higher education professional with a focus on learning, teaching, academic policy and governance. Her sector experience informs and contextualises Rachel's current work as a transformational leader in the field of student engagement analytics. Rachel works closely and collaboratively with universities, leading and facilitating business enablement and change management activity to enhance student success. Rachel has published peer-reviewed outputs from her collaborative work in learning and teaching development, and she has written two book chapters that offer academic and thought-leadership insights. Rachel has also undertaken a range of national and international consultancy.

Professor Janice Kay is co-founder of Higher Futures, which supports universities and sector organisations to deliver in challenging financial circumstances. Before this, Janice was Provost and Senior Deputy Vice-Chancellor at the University of Exeter. Her notable contributions to HE were recognised with a CBE in the Queen's 2017 New Year's Honours. Janice is also a strategic advisor to Kortext.

Lisa Dawson is a senior leader at the University of Edinburgh, where she serves as the Academic Registrar, overseeing the integrity of academic processes and the delivery of innovative student services. She has a diverse background in public- and private-sector roles before joining the University. Passionate about promoting women in leadership within higher education, Lisa also serves as Deputy Chair of the Student Casework practitioner group and as a Non-Executive Director and Volunteer Champion for MoveOn.

Peter Fitch is an Associate Professor (Teaching) at UCL's Arena Centre, where he supports educational development and enhancement across the institution, with a strategic lead role in Personal Academic Tutoring staff development. He is also Associate Director of the UCL Higher Education Development and Support Institute (HEDS), where he leads on faculty partnership and programme development work. Pete is a Senior Fellow of AdvanceHE and a Recognised Leader in Advising with UKAT.

Dr David Gilani works at Middlesex University as a staff governor and Head of Access and Participation, leading interventions, research, and reporting to ensure equitable student success. Having started his career as a students' union officer, he is a strong proponent of the student voice, and in 2012 he founded the Student Publication Association, which supports student journalists across the UK and Ireland. He strongly believes in universities working together to support student experience efforts, and is a former co-chair of the CASE Student Communications conference and the lead for AHEP's Student Experience and Engagement Network. He has recently completed his PhD at the University of York on student belonging.

Sarah Graham is a higher education scholar with an interest in student partnerships, student support and inclusive practices. A Principal Fellow of AHE and Academic Dean, Sarah is actively engaged in strategic educational projects at Newcastle University and beyond, working with lived experiences from the community to understand and progress practices.

Nicky King is a Professor of Natural Sciences Education with an interest in widening access, student success and student support. She has recently led the transformation of academic student support at the University of Exeter.

Rachel Lucas is a higher education professional. Rachel works at the University of Essex, where she leads the teams supporting Wellbeing, disability, employability, academic skills, student information services, student funding and hardship, registration and welcome. In this role, Rachel helped shape the university's policy on personal tutoring. Rachel has previously served as a Faculty Manager for Arts and Humanities and as Head of Quality Assurance and Enhancement.

Michaela O'Brien is an Emeritus Fellow at the University of Westminster, having previously held senior leadership roles focusing on curriculum, academic support and the student experience across the university's College of Creative Arts & Technologies. Michaela is particularly interested in inclusive approaches to student success; not-for-profit campaign communications; gender and diversity; ethics and transparency.
<https://www.linkedin.com/in/michaelaobrien/>

Professor Claire Pike is Pro-Vice-Chancellor for Student Education and Experience at the University of East Anglia, where she leads the university's educational portfolio development and delivery, the enhancement of academic quality, and partnership working with students and external stakeholders. She was previously Pro-Vice-Chancellor (Education Enhancement) at Anglia Ruskin University, in which she led the institution to a gold award in the Teaching Excellence Framework, strategically led widespread growth in degree apprenticeships, and led the Talent/Skills strand of the cross-institutional Innovate Cambridge strategy. A molecular biologist by background, Claire has undergraduate and doctoral degrees from the University of Cambridge, has lectured on a wide range of biological and biomedical subjects in Cambridge and London, and supervises PhD candidates in biomedical and pedagogical subjects. Claire is a Principal Fellow of the Higher Education Academy, a National Teaching Fellow, President of the Heads of University Centres of Biomedical Sciences and a Fellow of the Royal Society of Biology. She is passionate about the power of education to positively transform people's lives.

Emma Rowsell is Chief Student Officer at The University of Surrey. Her role includes institutional leadership of the Access and Participation Plan, and, as such, she has a deep interest in student success. She is currently running a pilot project within Surrey to trial a new approach to student advising. Emma has previously run Student Services at The University of Southampton and The University of Nottingham.

Richard Stock has over 20 years' experience of working in higher education, most recently as Academic Registrar at the University of Essex, leading a large central professional services team and supporting education strategy and delivery, managing governance, and supporting student success. He was a strong advocate for using data to support student success at Essex and played a key role in the project to introduce a tool to measure and respond to student engagement, aligned with a new policy framework. In June 2026, Richard joined University College London as Executive Director for Student Services & Registrar, where he leads a diverse team dedicated to delivering an excellent student experience and supporting UCL's education mission across access and student funding, education services, student operations, compliance and governance. He

also works closely with the Vice-Provost (Education & Student Experience) and the Senior Education team to deliver the Education Strategy.

Dr Nicola Watchman Smith is a Principal Fellow of the Higher Education Academy and has worked in UK higher education for over two decades. An advocate for challenging barriers to educational participation, Nicola works to promote meaningful student engagement as a route to student success, with a professional passion for celebrating student voice and enhancing student belonging. Nicola is a published author, with research interests spanning higher education practice and the Northern Soul music scene.

Professor Kathryn Woods is Pro Vice Provost Student Academic Engagement at University College London. She provides academic leadership for Personal Academic Tutoring and student partnership.

<https://orcid.org/0000-0003-0657-6409>ORCID

Rachel Maxwell  <https://orcid.org/0000-0002-5526-0251>

Peter Fitch  <https://orcid.org/0000-0001-8594-5692>

David Gilani  <https://orcid.org/0000-0003-1099-7118>

Sarah Graham  <https://orcid.org/0000-0001-9522-5138>

Nicky King  <https://orcid.org/0009-0007-7864-9669>

Claire Pike  <https://orcid.org/0000-0002-4642-7427>

Nicola Watchman-Smith  <https://orcid.org/0000-0002-8665-6232>

Kathryn Woods  <https://orcid.org/0000-0003-0657-6409>

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