The EvoLLLution presents

2017
A Year in Review

The evoLLLution
A DESTINY SOLUTIONS ILLUMINATION

From the Editor

We've always done our best to try to capture the essence of the past year in our Year in Review eBooks, and this year unearthed something very interesting: The higher education industry is, well and truly, in a new era. And that new era is defined by technology.

Until the mid-2000s, the impetus for institutions to change was minimal and most colleges and universities were focusing on serving traditional students in traditional ways. Then we became embroiled in the difficult part of transformation, where those who chose to ignore the shifts were forced to reckon with the fact that the demographics are different, the financial challenges are evident and the competition is significant.

Critically, we were forced to accept that higher education institutions compete in a market with real consequences for those who choose not to evolve.

2017 marked a new dawn for higher education. We're on the other side of the discussion around whether higher education is changing and are instead exploring how institutions can adapt. That how has been largely defined by technology, which is at the center of higher education's new wave.

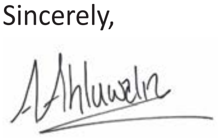
Most importantly, though, all this change and technology is focused around meeting the needs of learners. We're automating some aspects of the administrative back-end to allow staff to deliver a better student experience. We're personalizing education and giving students more control over their education journey. We're finding ways to leverage data to ensure we're actually addressing the needs of learners. All this tech isn't being used for its own sake, but instead to meet and exceed the expectations of today's students—or should I say customers.

As the industry continues to evolve, I'm proud to be a part of the 21st-century higher education industry. I'm proud to work every day with leaders from across this space who are themselves working so passionately to ensure they are expanding their reach and serving the students who need their help.

Most importantly, I'm proud that The EvoLLLution has been a place where these discussions have taken place.

Please enjoy the 2017 Year in Review eBook, and thanks for reading!

Sincerely,



Amrit Ahluwalia

Managing Editor, The EvoLLLution

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Serving Today's Learners

TODAY'S LEARNER

Adapting to Non-Traditional Students Creates Impetus to Innovate Traditional Models

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Across the United States, colleges and universities are dealing with challenging marketing conditions. As budgets tighten and the number of high school graduates declines, postsecondary institutions are having to seek out new models of institutional management and new student demographics to remain viable. In this interview, Melissa Vito, Kasey Urquidez and Vincent J. Del Casino Jr. reflect on some of the new audiences they're adapting to serve and outline how the institution is evolving to ensure these demographics find success.

The EvoLLLution (Evo): Why is it important for colleges and universities that have historically focused on serving the 18- to 22-year-old traditional student population to begin expanding their scope?

Melissa Vito, Kasey Urquidez and Vincent J. Del Casino Jr. (MV/KU/VDC): There are a couple of factors that come into play here. The first is that the traditional pipeline of eligible students is flattening or decreasing across states and markets. The second is an increasing number of non-traditional students seeking postsecondary education. While the traditional 18- to 22-year-old student will always be at the core of our educational offerings, especially on-campus offerings, our focus has broadened to adapt to the needs of non-traditional students who may be returning to college and who want a University of Arizona degree, perhaps in an online, statewide distance setting, or even internationally.

As these student populations evolve, we see an opportunity to diversify our suite of educational offerings and create degree programs that are agnostic in their delivery methods while always delivering on the UA's rigorous academic standards. In the end, it means more choices for more students. It's a very exciting time.

As these student populations evolve, we see an opportunity to diversify our suite of educational offerings and create degree programs that are agnostic in their delivery methods while always delivering on the UA's rigorous academic standards.

Evo: What are some of the most significant differences between attracting prospective high school graduates and attracting non-traditional, adult learners?

MV/KU/VDC: When attracting non-traditional students, we need to be more aware of the factors that influence their decision-making. The reputation of academic programs, their schedule and availability of classes, cost, and career impact are all factors these students are considering. This differs from our more more traditional students, who consider the reputation of academic programs but are less focused on the schedule and cost impact of courses. Additionally, non-traditional students typically have factors to consider that traditional students may not—such as mobility, family obligations, and current career.

On the international level, we're also making significant inroads and investments in exciting projects like our global micro-campus network, which really changes the game in terms of a worldwide approach to education and the technology to support it. We're now able to bring UA degrees at local market rates to students in high-demand international locations where the cost and distance of American higher education is prohibitive for most of the population.

In each of these examples, however, we seek to provide a consistency of excellence that cuts across of platforms and settings. So, if an 18-year-old wants a traditional on-campus experience, or to experience the UA from a micro-campus in China, or a 35-year-old wants to advance in her career by finishing a bachelors' degree online, each student can expect a consistently excellent, world-class education.

Evo: How are you and your team at UA adapting to create (and communicate) an enticing environment to prospective non-traditional learners?

MV/KU/VDC: We have shifted our focus to look at the specific needs of this population and how we can meet these students where they are. For instance, we work with students with specific scheduling requirements and recommend class modalities that best fit their needs and structure programming to best accommodate their ability to attend and include opportunities to bring families. It's really all about providing the flexibility and convenience that they expect to find with brands like Amazon or Apple.

We've built our online model to provide on-campus support to students no matter their distance. Our entire team is housed on campus—and, critically, it has not been outsourced as is the case with nearly all online universities. This approach has resulted in a 93 percent satisfaction rating from our students because they get the same professors as on campus, the same courses as on campus, the same world-class education, combined with dedicated on-campus support and service.

Our thinking about "non-traditional" learners has also allowed us to take a look at ways to re-engage students who may have left the UA. Oftentimes these students aren't able to persist to graduation due to a variety of reasons but now may benefit from coming back. Last

August, we launched our Second Start readmission program which allowed students to effectively start with a clean slate, given they met certain criteria. Before launching, we created data-informed profiles of students who had been absent for at least three years and would be likely to persist if given a second chance. The program has been a huge success and we've brought 214 students back to campus through the Second Start Program since its launch.

Evo: Looking past acquisition, how do the needs of non-traditional students differ from those of 18- to 22-year olds when it comes to retention and persistence?

MV/KU/VDC: While some needs are different, many of them are the same. For instance, we know that financial factors tend to weigh most heavily across all student types. However, the impact of cost and financial assistance for non-traditional students can be tied up in factors such as employer-provided tuition reimbursement, family needs, etc.

Successful retention efforts also require experiential differentiators for students. In the case of UA Online and statewide distance location learners, we know that these students typically choose the UA for ongoing professional development or a future career change; so things like career coaching, networking, and applied leadership assignments are often baked into their programs. These value-adds are a key component of how we create stickiness along the student journey and are also a key driver for our students' ultimate success.

Evo: How is UA evolving on this front to help ensure non-traditional students' success through their degree programs?

MV/KU/VDC: As previously mentioned, our online students are assigned student academic success specialists, who are embedded within each college to facilitate the needs of each student and cultivate deep connections with them. These specialists provide high-touch, continual contact with online students and are responsible for driving term-over-term enrollment while also helping the student navigate and take agency of their experience.

We've also invested in certificate programs, which allow students a flexible and convenient educational option without the time and financial commitment of going back to school full time. Students can earn microcredentials in highly focused educational programs like web development or digital marketing while gaining hands-on, real-world experiences they need to thrive in the workforce. We work actively with employers to understand the needs of their workforce and what they are looking for when they hire students graduating from college. This helps inform programs like web development or digital marketing.

Evo: What are the most significant challenges involved with changing gears to serve this broad audience of non-traditional students?

MV/KU/VDC: The most challenging aspect is educating the campus community to understand that this population is different and needs different types of support to succeed at our institution. We have done a lot to educate our academic units and campus partners to the differing needs of this population.

ACCESSIBILITY

Making the College Promise a National Reality, One City at a Time

MARTHA KANTER
EXECUTIVE DIRECTOR OF THE COLLEGE PROMISE CAMPAIGN & SENIOR FELLOW, NEW YORK UNIVERSITY

Since America's College Promise Proposal was introduced in 2015, there has been ferocious debate around whether it's realistic to make postsecondary education accessible to everyone at low to no cost. Of course, College Promise programs have existed for longer than that. Since 2009, the number of College Promise programs offered by colleges and universities across the United States has grown to over 200 and it continues to rise. The march toward total postsecondary access is well and truly underway, but there's still work to be done. In this interview, Martha Kanter, former Under Secretary of Education, shares her thoughts on why the College Promise campaign has grown so vigorously and outlines the roadblocks standing in the way of its further growth.

The EvoLLLution (Evo): Why has the number of College Promise programs nearly quadrupled—from 53 to more than 200—over the last eight years?

Martha Kanter (MK): The College Promise movement is growing exponentially because many education, business, government and philanthropy leaders across the country recognize that a high school education is no longer sufficient to prepare students for success in the workforce and in the rest of their lives. These leaders—community college and university presidents, elected officials, policy makers, researchers, corporate CEOs and foundation presidents—are spreading the word that success in the 21st Century depends on the opportunities Americans can harness to complete a two- or four-year college degree, or at a minimum, a technical certificate or apprenticeship training to advance beyond a high school education.

In the last 20 months, cross-sector leaders in 41 states have drawn inspiration from those first 53 College Promise programs, knowing that our country can no longer afford to leave students unprepared for the workforce. Republican and Democratic lawmakers at the local, state and federal level recognize that if we want to drive our social, economic and civic prosperity, we need to have a more educated society. And they realize that it makes good economic and civic sense to cover, at a minimum, the first two years of college tuition and fees for eligible hardworking students.

With college costs soaring and student debt at an all-time high, far too few students seek or complete a higher education. And for those who do, many are burdened with decades of debt.
That's where College Promise comes in. If our leaders, working together, can make the first two years of higher education as

universal and affordable as a K-12 education has been in the 20th century, more students will start and complete a college education with the knowledge and skills for the careers they will pursue throughout their lives. That's good for students, families, local economies and the prosperity of our nation as a whole.

A generation ago, the United States led the world in the number of college graduates; today we are 12th. If more states and communities enable students to complete higher education without the burden of crushing debt, more Americans will seek an education that today seems unaffordable and out of reach for too many people, especially those from lower socioeconomic sectors of our population. We want, once again, for our country to have the greatest number of well educated, career-ready college graduates in the world.

In the last 20 months, cross-sector leaders in 41 states have drawn inspiration from those first 53 College Promise programs, knowing that our country can no longer afford to leave students unprepared for the workforce.

When we launched our campaign on September 9, 2015 at Macomb Community College in Warren, MI, we assembled a high-performing National Advisory Board composed of 37 leaders from education, business, philanthropy, labor, non-profit organizations, government, and students. Chaired by Dr. Jill Biden and former Wyoming Governor Jim Geringer (R-WY), this dynamic board has actively worked—above and across party lines and special interests—to engage leaders from their respective sectors and communities to encourage states and localities to design and implement College Promise programs. We believe their public advocacy and their strategic support have done a tremendous amount to build momentum for the College Promise Campaign.

We also believe that the campaign's communications and advocacy efforts have been effective at building awareness leading to increased public support. Through social media, op-eds, letters to editors, and website promotions like the Free College Video Competition, we have worked tirelessly to make the case that the need for the College Promise is urgent. Among our most effective tools are student stories; as we move ahead with the campaign, we believe that a great way to showcase the power of the College Promise is to demonstrate how students' lives have been empowered through access to higher education, especially those students for whom college would not have been possible without the added benefit of the College Promise.

In our drive to build broad support for the College Promise, we have supported a rich body of research for local communities and states to leverage as they create and sustain their College Promise programs. The availability of data to illustrate College Promise outcomes related to college access, retention and persistence helps guide the decisions and actions of local and state leaders. Every new program that gets established presents an opportunity for researchers and evaluators to gather more evidence to demonstrate the impact of the College Promise movement and for policymakers and legislators in neighboring communities and states to see the value proposition for replication.

Members of the College Promise Advisory Board are taking action to boost our campaign. Here are a few examples to demonstrate the kind of work they do to build broad public support:

In New York, two of our board members, Dr. Nancy Zimpher, Chancellor of the State University of New York, and Dr. Gail Mellow, President of LaGuardia Community College, have worked tireless to promote the College Promise in their state, penning op-eds, mentioning it in speaking engagements and hosting events on campus. We believe that their advocacy is making a difference in moving "free college through the Excelsior Scholarship initiative" forward in state legislation.

Bill Swanson, Retired Chairman and CEO of Raytheon, co-authored an editorial praising the College Promise program at his community college alma mater, Cuesta College. In that piece, he and Cuesta College President Gil Stork made a business case for making a community college education affordable for all. He also traveled to campus to help launch a $10-million fundraising effort to extend the Cuesta Promise to cover a full two years of community college tuition. This kind of effort, from an internationally recognized business leader, certainly boosts our momentum.

The College Promise movement is growing all over the country, especially in California, where there are more than fifty programs announced or underway. The growth has been explosive. In the past year, programs are emerging in cities like Los Angeles, San Diego, San Francisco, and Oakland. But also in rural and suburban communities too: Barstow, Cuesta, Siskiyous and San Marcos.

What accounts for the increased momentum in California? First, California is building on its longstanding Master Plan commitment to making and keeping public higher education accessible and affordable. Second, lawmakers throughout the state are drawing inspiration from every single program that is proposed or established in their respective region. Every new program offers an opportunity for communities to consider innovative ways to model sustainable College Promise programs tailored to meet local student needs, build a vibrant workforce and spur regional prosperity.

Last August working with leaders in California, the College Promise Campaign sponsored a statewide conference to build on lessons learned and expand local College Promise support. The two-day event was sold out. Interest in the movement was so strong that two new gatherings will take place later this year, one in Northern California and the other in the south.

Public and private support continues from College Promise Advisory Board Members like Scott Svonkin, President of the Board of Trustees of the Los Angeles Community College District, who has worked closely with Mayor Garcetti to build support for the LA Promise. West Sacramento Mayor Christopher Cabaldon has been a champion of the College Promise in a wide range of public venues and successfully led a referendum last November to establish free community college programs for eligible students in his city. And business executives Wade Randlett and Don Proctor have led the way in making the high-technology industry aware of the dire need to keep college affordable to increase the talent pipeline and, thus, economic development.

We've also had a huge push from Dr. Eloy Oakley, who led the movement to establish the Long Beach Promise, when he was president of Long Beach City College. Now chancellor of the California Community Colleges, Dr. Oakley continues to boost awareness of the value of the College Promise. Last year, he was recognized by President Obama as a Champion of Change for his work on behalf of community colleges.

One specific outcome of the California College Promise momentum is the 14 community college districts, representing 33 community colleges, that received $15 million in competitive grants to expand or establish College Promise programs. This one-time funding in the 2016-17 budget was awarded by the California Community College Chancellor's Office to programs that show the greatest promise for improving college readiness, access and overall student success.

Evo: How realistic is a future where the College Promise is a reality for every prospective student—both traditional and non-traditional—in every municipality across the United States?

MK: A similar question was asked 100 years ago, at the advent of the free high school movement. At that time, we began our shift as a nation from an agrarian economy to a more industrial society and there was a need to train people for jobs that required more education. People worried that communities could not afford to pay for universal high school. But leaders at that time recognized the vital importance of preparing students with the knowledge and skills needed for the changing economy; they knew that in order for the United States to be economically competitive they needed to invest in a universal high school education, state by state. Slowly over the years, they did!

What was the result after every state made high school free? We had the most highly educated and trained workforce in the world. By the middle of the 20th century, free high school coupled with free or nearly free public community college and university opportunities in addition to the GI Bill for veterans returning home, meant our nation reaped the benefits of having the greatest number of college graduates and the most highly skilled workforce in the world. Today, a generation later, we have lost first place. We are now 12th. We can do better than that in the 21st century. That is our challenge!

Many people today question the value of free community college, concerned about the costs to their communities and local economies. But let's consider asking ourselves: What will happen if we don't invest in our people and enable them to get an education beyond high school? What will happen if we don't prepare students for 21st-Century jobs? We will fall further behind in our global competitiveness. If we don't invest in preparing our workforce as other countries do, we will fall further behind. It's that simple.

Early impacts of College Promise programs show significant increases in enrollment of first generation, underrepresented, underserved student populations, increased persistence from semester to semester, increased college aspirations in youth, reductions in the number and size of college loans students take, and a doubling of College Promise programs in 41 states over the past few years.

The College Promise Campaign supports communities and states to design economically sustainable College Promise programs that leverage multiple funding streams, evidence-based educational interventions, and behavioral incentives to increase student success in the 21st century. A College Promise for All is possible. It depends on building the will of our people across the sectors of government, business, education and philanthropy to ensure that an education beyond high school is an expectation for every American. If we can make the case to America that college graduates as well as those who have completed postsecondary certificates earn more, have a higher probability of being employed, utilize fewer government resources, are healthier and happier, and pay their fair share of taxes, we may well be able to realize the College Promise for All.

Evo: What are some of the most challenging roadblocks you see standing in the way of achieving that goal?

MK: There are two key roadblocks standing in the way of a nationwide expansion of the College Promise.

First, building widespread understanding that education beyond high school is critical for success in the 21st century is a challenge when nearly half of adult Americans never went beyond a secondary education. It was good enough for an assembly line job in the 20th century, but jobs have changed and the skills required for success in the majority of jobs necessitate education beyond high school.

Second, we have a college completion challenge with nearly half of students not completing their two- or four-year degrees in six years. Putting solutions in place to give students the support they need to enter and complete college is critical. Mentors make a huge difference. So do guided pathways so students can follow a clear plan and the required courses to meet their college and career goals. High-quality courses and programs of study taught by professors who inspire students to solve problems, engage in the hard work of learning, and reinforce their confidence have an enormous impact on student achievement. The cost of funding the College Promise is also a challenge for communities, but over the next few decades, our nation will enjoy the largest transfer of wealth from this generation to the next in our history. We pay for what we value. We cannot imagine a more importance investment in our nation's future than making higher education universally available and affordable for all.

Evo: What are the responsibilities held at each level—federal government, state government, municipal government and higher education leadership—to making the College Promise a national reality?

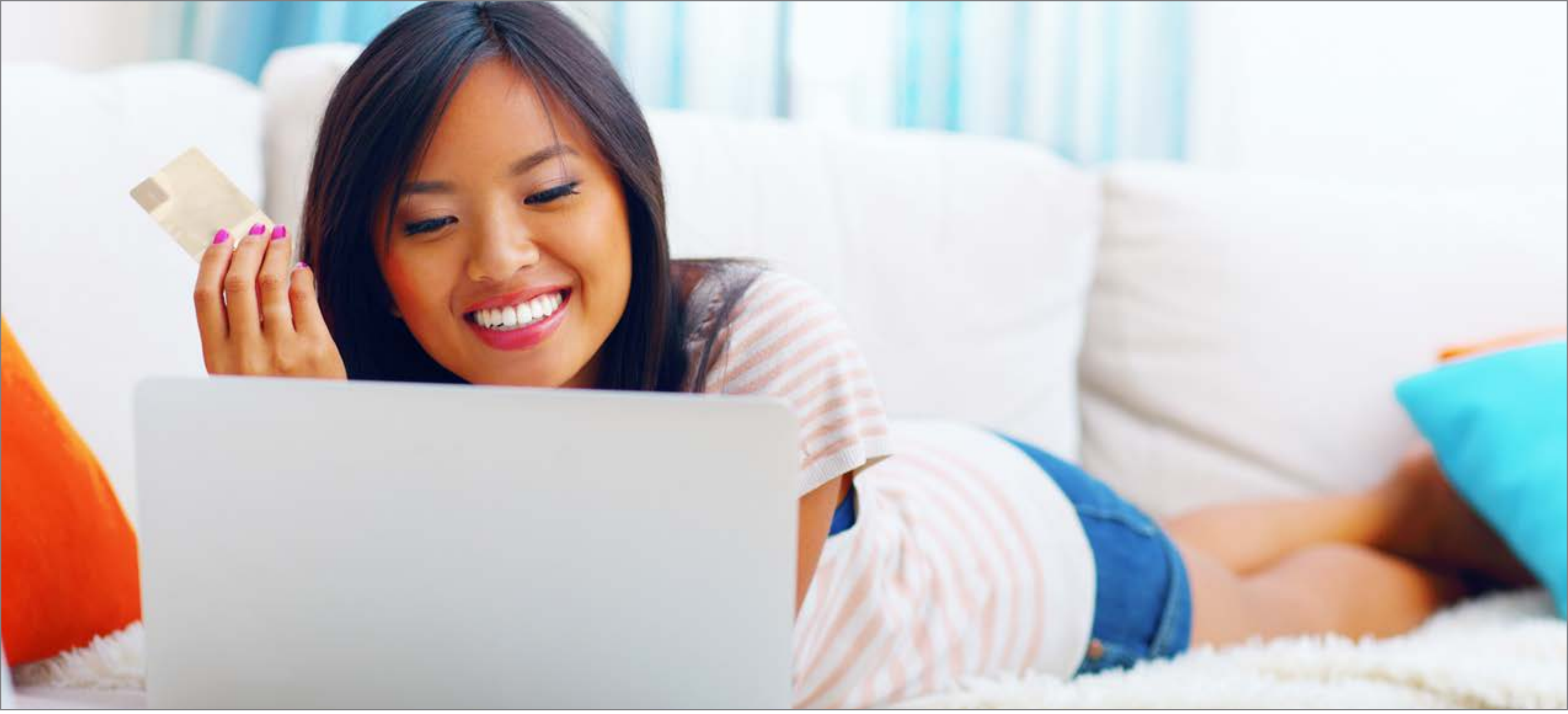
MK: To make College Promise a national reality we need buy-in at all levels of government as well as support from education, business and philanthropic leaders in our local communities and states.

While the drive to develop and expand College Promise programs is happening at the local and state level, we need the federal government to continue its commitment to fund Pell grants for low-income students, work-study, and other forms of federal student aid. The federal government has the opportunity ahead to reduce the interest rates on student loans, to reduce the number and complexity of student loans, to simplify or even eliminate the student aid application process because the government already has the information about family income, to support TRIO, GEAR UP and other federal programs to help low-income students achieve high school graduation and college success, and to spur innovation to increase student achievement. These solutions have had bipartisan support in the past. Let's hope our federal leaders can join together to do their part in retaking first place in the world in the number of college graduates ready to lead our nation forward in the 21st century.

At the state level, lawmakers must be responsible to build and sustain the College Promise for current and future generations. Promise program designs must have a sustainable infrastructure so students can start and complete their postsecondary education and communities can be assured that students are well prepared for the careers they will enter and to contribute to the communities in which they will live and thrive.

Municipal leaders, especially mayors and heads of social and community service agencies should reach out to education leaders at all levels and come to a common table to address the opportunities and challenges they face together. Too many local leaders work in silos. Working together, new opportunities can be harnessed, efficiencies gained, and relationships deepened to increase student and community success for the long-term. One has only to look at College Promise programs that have been in place for more than a decade to see the results gleaned in local economic development and social cohesion.

In addition, at both the local and state level, leaders must build a pipeline approach with the early learning and K-12 sectors to build the right mix of educational supports and interventions that create a college-going culture for the long-term. Higher education must reach out to early-learning and K-12 leaders at the administrative, faculty and student levels to create and sustain the critical partnerships that tackle the most pressing problems of education like the drop-out rate, attendance, the need to work, nutrition, and other challenges faced by too many students that inhibit college aspirations and success. We must work to achieve an all-in commitment where leaders at all levels of education, government, business and philanthropy can collaborate, share ideas, solve problems and support the fundamental concept that education is an investment, not an expense, for the success of current and future generations.



CUSTOMER SERVICE

Student-Centricity and the Amazon Experience: Evolving IT to Meet Students' Expectations

JACK CHEN
CHIEF INFORMATION OFFICER, ADELPHI UNIVERSITY

Convenience today is more important than ever. Customers in every industry expect near-immediate responsiveness, self-service abilities and on-demand access to information. Though this is certainly not a new trend, colleges and universities have only been shifting to adapt to this trend over the past five to ten years. But this shift requires more than a change in mentality—it requires a range of strategic and tactical investments, matched by a new set of institutional priorities, to be truly successful. In this interview, Jack Chen reflects on his institution's process of making information accessible on-demand to students and shares his thoughts on the key steps that must be taken for a college or university to be truly student-centric.

The EvoLLLution (Evo): Why is it so important that universities today are able to deliver easy-to-find information on-demand to students?

Jack Chen (JC): Today's college students are digital natives who expect access to information—anywhere and anytime. Given that students can easily and quickly transfer bank funds or purchase an airline ticket, it is understandable that they want on-demand academic information.

Students also lead busy lives outside of college. Adelphi University's 2014 Undergraduate Student Experience Survey conducted by our Office of Research, Assessment & Planning revealed that 77 percent of our students held a part-time job. Providing 24/7 access to information is convenient, efficient and enhances the overall student experience. In fact, students believe that a majority, if not all, of campus services should be available online 24/7. What's more, in addition to being on-demand, information must be delivered via the students' preferred method—mobile.

At Adelphi, we began conceptualizing a mobile strategy a decade ago. It was one of the key initiatives detailed in the Information Technology Strategic Plan in 2007. Our highly successful AU2Go mobile app evolved from a web app to the current version of native apps for iOS and Android. It enables on-demand and personalized access to areas of critical importance to students: registration and course information, Moodle Learning Management Systems (LMS), online course evaluations, subscription-based notifications and digital ID, among others. We continually add academic and co-curricular services to give our students broader access to the programs they need.

> Today's college students are digital natives who expect access to information—anywhere and anytime.

Evo: How does creating this level of information accessibility impact administrative services?

JC: A college student's life does not fit neatly into the traditional 9-to-5 hours of administrative offices. Outside of those hours, a student might need a waiver to switch a class, request a transcript, file for graduation or address an outstanding payment. Even during those hours, a student would prefer to access the information on a cell phone while taking a break from studying rather than wait on a line. Providing this level of information to students 24/7 is more efficient, especially in the case of time-sensitive deadlines.

While on-demand accessibility is convenient for students and the administrative staff, it also offers another significant benefit to a university: reducing operating costs. As colleges and universities set a priority of reducing operational costs, streamlining administrative services takes on new urgency. We continue to incorporate technology and migrate to cloud solutions to improve data collection and expedite workflow for a range of administrative processes.

However, the administrative support structure should be examined. For example, institutions may consider a centralized call center, extended hours of coverage and multiple channels to communicate with diverse student groups. They may consider offering flexible hours and telecommuting options to support staff.

It is critical that institutions dedicate their efforts to ensuring that the information is accurate. There must be a defined and well established information security infrastructure in place to support anytime and anywhere access. The institution must develop specific policies and procedures to govern information on-demand services.

Evo: What does the importance of making information accessible on-demand say about the changing nature of students?

JC: In today's world, students, like everyone else, want information in a nanosecond. And the administrative aspect of college—registering for classes, completing forms—is something students want taken care of immediately. Furthermore, students have become accustomed to the Amazon model of access and services. They want to be treated like customers with excellent customer service. They do not want to be told what they should buy; they want options.

Students expect that completing their course registration should be similar to an Amazon shopping experience: It should be fluid, easy and transparent. And if Amazon can suggest products based on customers' choices, shouldn't a university be able to tell students what courses they need to complete their degree program on time? And like customers, students want that product to be in perfect condition so ensuring the accuracy of information is a top priority.

Giving students 24/7 on-demand access to information improves the student experience and also reflects positively on the university. However, if students are presented with challenges, either in their ability to access the information or in the quality of that information, they will take to social media to voice their complaints. They then reach a far broader audience with more significant ramifications, especially in terms of attracting prospective students.

Evo: How has the role of institutional IT and the CIO evolved to address the increasing importance of technology and information availability?

JC: The increasing importance of technology has led to a greater recognition of the role of institutional IT with many more demands for access to information. IT is looked upon as a resource for identifying emerging technology. As a result, the role of the CIO has evolved to become more strategic in effectively integrating technology, establishing priorities and maximizing resources. The CIO should have a keen awareness of those services pertaining to retention and graduation that positively impact the student experience.

Implementing any effective strategy requires leadership from the CIO in collaboration with campus academic and administrative units and student organizations. There has to be an open channel of communications to assess the effectiveness of the services, respond to changing priorities and ensure transparency. Given the dynamics of social media and its influence on students, the CIO should initiate a program to market IT services on the different social media channels. The CIO should develop a technology plan with goals and key initiatives that aligns with the university's stated goals, addresses stakeholders' needs and serves as a guide to meet current and future needs. At Adelphi, we are now implementing our fourth three-year IT plan.

But even as the number of projects increases, the basic tenets of institutional IT remains firm. Each application is not an isolated IT project. Mobile strategy is similar to web strategy. Each is an institutional strategy. While spearheading the delivery of increased services and applications, the CIO still must focus on the fundamental practices of IT to ensure security and accessibility.

Evo: What advice would you share with postsecondary IT leadership to ensure that students have easy and regular access to critical information?

JC: Postsecondary IT leadership has to develop a future-forward perspective. The starting point should be the development of a strategic technology plan which details a systematic approach to implementing a mobile strategy. This plan will serve as a road map. It will have been created with input from key campus constituents that takes into account their needs, but also makes them aware of the opportunities and challenges of offering 24/7 mobile accessibility. It is important to maintain ongoing communications with these constituents. They are partners in the project and should be kept informed of any changes or delays. As the project is rolled out, they should be providing evaluations and assessments of the new services.

As detailed in the plan, the CIO will have to create a superior service model to support this new functionality. The CIO and the IT department will need to tailor the enterprise architecture to integrate disparate information systems to deliver cohesive information and ensure the reliability of 24/7 access to the information.

The CIO also will need to evaluate IT resources, both staff and budget. A mobile strategy may require reallocation of funds. The staff may need additional training to augment their skills or additional hires with advanced skills may be needed to successfully implement the strategy.

ACCESSIBILITY

The Broad, Significant and Shared Benefits of Committing to Transfer

SHIRLEY ADAMS
PROVOST, CHARTER OAK STATE COLLEGE

In the United States, the ecosystem can be challenging for students to navigate. Filled with two-year and four-year institutions that vary in price, focus, modality and more, finding the right institution can be tough. For students enrolled at two-year institutions, finding a pathway to a bachelor's credential can be even harder. However, it's a path worth travelling given the significant benefits of holding a four-year degree. While some institutions intentionally strive to make it tough to transfer, the majority of four-year colleges and universities across the US are searching for ways to facilitate more transfer and to recognize a broader array of credits. Of course, this work has been the bread-and-butter of completion colleges for years. In this interview, Shirley Adams reflects on the work it takes to forge and maintain successful articulation agreements, and shares her thoughts on the benefit of this work both for institutions and for students.

The EvoLLLution (Evo): What does it take to establish a successful articulation agreement partnership with two-year colleges?

Shirley Adams (SA): In Connecticut, we have a transfer pathway agreement between our community colleges, our four state universities, and Charter Oak State College. That Transfer and Articulation Program agreement was the result of legislation in 2012 and, while the majority of the transfer pathways have been finalized, it is still a work in progress. Charter Oak had both program and full college agreements in place with all of the twelve community colleges before the transfer pathway was mandated. For this article, I am going to talk about articulation agreements from Charter Oak's perspective and about agreements outside our system, although many of the same principals apply.

To answer your question—it takes a lot of work to establish a successful articulation agreement partnership. We look to develop programmatic articulation agreements in areas of our strengths. Although we are a transfer-friendly institution, we look for colleges that have associate degrees that are aligned with our degrees, thus making the transfer seamless for the associate degree graduate. We look at articulation agreements as relationship building. A member of our admissions staff will reach out to a member of an admissions or transfer staff at the two-year college. That is followed by a visit to the campus. This visit could have been precipitated by us, by the two-year college, by one of our faculty, or even by one of our students. Before the visit, the admissions counselor will have checked to see what program will transfer easily, what the enrollment is like in the program, the graduation rate for the program and, if there is any special licensure, what the pass rate is. The result of the visit is usually a draft document showing how the courses will transfer to Charter Oak and what courses students have left to take, including what courses the students could still take at the two-year college once they matriculate at Charter Oak—thus reducing the cost of the education for the student and increasing the revenue for the two-year college. The course list, once approved, becomes part of the articulation agreement which also delineates the expectations of both the two-year college and Charter Oak.

Having a signed agreement is just the beginning of the partnership. Articulation agreements are not successful in a vacuum. Once the agreement is established, it takes both colleges to ensure that it is nurtured, updated and maintained. Both colleges need to have someone designated to ensure that this happens. In addition, it takes a strong academic advising support network at the two-year college to help the students navigate the articulation agreement. The faculty in the discipline of the agreement also need to promote the agreement to their students. Ideally, students receive a copy of the agreement on the day they enroll at the two-year college so they can begin making plans to complete their two-year degree and then to move right on to their four-year degree.

As part of the agreement, the two-year college has to agree to market the agreement to its students and it has to allow for us to market to its students, including holding transfer sessions on its campus or electronically on a regular basis.

Once the agreement is established, it takes both colleges to ensure that it is nurtured, updated and maintained.

Evo: Given the growth of online education, how does geography factor into the decision of whether or not to pursue an articulation agreement with any particular two-year college?

SA: First, one has to make sure that the college has approval to offer courses to students from the other state(s). We are a SARA college and we have articulation agreements in states that are not contiguous to Connecticut. Because we have a small staff, the farther the two-year college is from Connecticut, the more difficult it is for us to maintain that personal relationship with staff at the two-year college.

However, members of our admissions staff visit a number of the colleges outside of Connecticut where we have agreements and we also use teleconferencing to hold transfer sessions with other colleges. Using online chat applications and other technology also provides us with ways to keep connected with interested students.

Evo: What does it take, operationally, to manage a wide array of articulation agreements?

SA: The biggest challenge to maintaining a wide array of articulation agreements is keeping those agreements up-to-date as program requirements change. It requires both the sending and the receiving college to inform the other about any changes. And once the agreements are updated, it's necessary to make the changes on any documents, marketing materials, and in the Student Information System (SIS). It also requires keeping up with changes in staff. As staff come and go, those relationships need to be rebuilt.

We don't have a centralized process for articulation agreements, which makes it difficult to manage. On the other hand, it can work to our advantage. For example, the last articulation agreement we signed was started by a department head at our college and a department head at the two-year college who happened to meet at a conference. It was then turned over to our admissions person who worked with our registrar and staff at the two-year college. We had a formal signing where the relationship between the two colleges grew stronger and has resulted in another programmatic articulation agreement with that college.

Evo: How does committing to facilitating transfer pathways benefit the university?

SA: Since Charter Oak State College is a degree completion college, all of our students are "transfer" students. Having transfer pathways in place is part of our recruitment strategy. If we can establish a network of community colleges that sends us students, it cuts down on our recruitment costs.

We want adult students who have already demonstrated success at college. Because we have worked with the college in developing the articulation agreement, seen their curriculum, often met their instructors, and in most cases, already met some of their students, we know the quality of the program and the academic level of the students and that the students are capable of doing the work required to earn their four-year degree. A robust articulation agreement also benefits the two-year college because it validates their program(s).

Evo: How do students benefit from robust articulation agreement ecosystems between two-year and four-year institutions?

SA: For the adult students we work with, time-to-degree is extremely important. A robust articulation agreement by default is the shortest route to completing the degree. In addition to time, it saves them money. They are only paying for courses that they need to take. Students don't have to worry about whether their courses will transfer or not. If students know they want to earn a four-year degree, the entire plan is laid out for them so they know the end point when they sign up for their first course at the two-year college.

OPPORTUNITIES AND CHALLENGES

Growing Faculty Diversity is a Shared Responsibility of Critical Importance

FREEMAN HRABOWSKI III
PRESIDENT, UNIVERSITY OF MARYLAND, BALTIMORE COUNTY

Tasked with finding solutions to society's greatest challenges, colleges and universities today are working to get a handle on the growing chasms and divisions that are deepening across American communities. One way to improve the generation and research of new ideas is the introduction of new perspectives and experiences into the professoriate, but efforts to increase faculty diversity across the country have been slow. In this interview, Dr. Freeman Hrabowski III—who was a child leader in the Civil Rights movement and has, over the course of his career, helped drive great change in his own field, his own institution and across the postsecondary industry—shares his thoughts on the importance of faculty diversity and reflects on some of the approaches he thinks could be more effective in moving the needle.

The EvoLLLution (Evo): Why is a diverse professoriate so important for modern universities?

Freeman Hrabowski III (FH): The professoriate needs to be as diverse as possible. When thinking about the different ways in which our students and our society have become increasingly diverse, we're talking about different races and ethnicities. We're thinking about religion and diversity of political thoughts. We're talking about sexuality issues and prejudices against the LGBTQ+ community. We're talking about people with physical and mental disabilities.

We need people from all the different perspectives who can talk about not just the challenges they may face in our society but who will also bring the strengths of each of the groups to the table. A more diverse professoriate leads to more discussions, conversations and research focused on the future of our society and the solving of the problems of humankind.

The more diverse the group, the richer the discussions and the research and the potential solutions to the challenges of American society.

Evo: What role can faculty diversity play in the marketing efforts of a university?

FH: It can be really challenging to attract people from different backgrounds. If those people come to campus and don't see people from similar backgrounds, they might question if this is the right place for them. If you have, for example, an all-male faculty then women who are looking at potential employment at the institution are going to want to know why are there no women in this discipline, and what does this says about the institution's attitude towards women. That would be true for any group that may have been under-represented in a particular discipline.

The more diverse the faculty—the more people from different types of groups one finds there—the more likely it will be that others will look at the institution as a potential place to work. Beyond that, the more likely it will be that others look at the institution as a place that values the richness of points of view and of different perspectives.

Evo: How does a lack of faculty diversity impact the students who might be on a given campus or considering attending a particular institution?

FH: Our student groups are becoming increasingly diverse—I'm talking about people who are first-generation college students, people of colour, and all the other groups I've mentioned.

The fact is that if we want to make sure we understand the backgrounds, the perspectives, the challenges and the potential of the new students coming into higher education, we need to hear not only from those students but also from people who become experts in their disciplines and who have experiences coming from backgrounds similar to our students. People can assume they understand the young person who comes from a rural community as a low-income white student, for example, but if you don't have people who have seen those experiences or have some of those experiences themselves its really very challenging to understand and to be as concerned about and interested in those perspectives.

Additionally, when it comes to student retention, you'll see that when students don't feel people understand their approach or their challenges, they sometimes—and perhaps often—will decide this is not the best place for them. The more diverse the faculty group, the more they can understand and get to know the students and all of what's going on with them, but also the more they can develop strategies for helping those students to persist and succeed.

A more diverse professoriate leads to more discussions, conversations and research focused on the future of our society and the solving of the problems of humankind.

Evo: What are some of the most significant obstacles standing in the way of ensuring more diversity in the faculty ranks?

FH: The fact that the American professoriate is still primarily white has a lot to do with the fact that we all tend to hire people like ourselves. These are good people—these are people who care about ideas and want to support students of all types—but it takes special initiatives and special effort to create an environment in which people will be proactive in identifying and selecting people different from themselves.

What we tend to see is that people of any race and any gender will tend to select people like themselves particularly because the power is still in the hands—in many disciplines—of men and, quite frankly, we tend to keep selecting men.

We can find qualified people of all races and genders, and the fact is that we need to increase those numbers, across disciplines, for people who are completing PhDs and research experiences and finding faculty positions. The fact is that most people of colour will say it was really challenging finding that faculty opportunity.

Evo: How can universities overcome these obstacles to introduce a wider range of perspectives?

FH: Here at UMBC, which is predominantly white, we now have a student body that is almost half people of colour. From Asians to Hispanics to Blacks and others, we're at least in the high 40s in terms of the percent of our student population who are minorities. We also know that we need to have a larger percentage of faculty of colour, given that we are primarily a white faculty.

We have been making progress—we're now up to almost 10 percent African American faculty in the arts, humanities and social sciences, and are seeing similar numbers for Latinx faculty. We made tremendous progress in science and engineering, too. We have developed an approach of trying to get a presence in every department of under-represented groups. We've also developed an advanced program to increase the number of women and we have done things to support our LGBTQ+ faculty and staff group as well.

We have developed special initiatives, including an emerging scholars programs and an MS mentoring scholar program and underrepresented minority faculty affiliate groups for Blacks, for Hispanics, for Asians and for LGBTQ+ and we've had a strong effort involving the National Science Foundation for Women. We have a new program called STRIDE, which involves very highly respected faculty championing efforts to help other faculty look at implicit bias and current practices that might be impeding the recruitment of people of colour. We've come up with all of these initiatives and this is what they are: proactive initiatives that will not only bring in more people but will ensure that they have the kind of experiences that will lead to retaining and eventually tenuring them.

Evo: Is there anything you'd like to add about the impact of a diverse professoriate on an institution?

FH: We've challenged ourselves at UMBC to think about what shared governance truly means and it has everything to do with faculty taking responsibility, identifying the best people, and shifting to think about shared governance more as shared ownership.

We own this problem that we need more people reflecting different perspectives coming from different types of backgrounds together. It has been the faculty members—with support from the provost and the deans and others—who have really made the difference in creating these programs. Bringing in more post-doctoral students, bringing in others, and giving them the kind of support is what's increasing our faculty diversity.

The commitment has to be real and when people put both commitment and brain power together all of this is possible.

This interview has been edited for length and clarity.

Chapter 2

Leveraging IT to Understand Students Better

TECH TOOLS AND RESOURCES

Going Beyond the Status Quo: Maximizing the Institutional ROI for CRM with CLM

SHAUL KUPER
CHIEF EXECUTIVE OFFICER, DESTINY SOLUTIONS

Most higher education institutions and divisions today have a number of specialized systems operating behind the scenes to support the management of their institutions, including a Student Information System (SIS), a Learning Management System (LMS), some kind of financial management system, and perhaps a Customer Relationship Management (CRM) system.

These different tools all support crucial aspects of institutional management. Unfortunately, for most colleges and universities, these investments do not necessarily create value that students can see.

Students See, and Aren't Satisfied With, the Status Quo

A recent survey of students conducted by DJS Research found the following:

- 40% of American students said administration is so complex they spend less time studying
- 44% of American students said they would have had a better experience if they could interact digitally with their university
- 47% of students expect administration to be easier to manage, given the fees they pay
- 33% of American students said poor administrative systems negatively affected their view of the university
- 33% of students are frustrated by the paperwork and the complexity of institutional administration

These statistics hardly paint a picture of a happy student body. They do, however, prove one critical point: Back-end technology has an important and noticeable impact on the day-to-day lives of students.

Students want a seamless customer experience from their college or university, one that more closely mirrors what they see from companies like Amazon and Uber. They want it to be easy to interact with their institution.

So how can institutions make the most of their investments in various management systems? How can they ensure they're still managing these critical parts of their institutions and divisions while delivering the kind of engagement that actually improves the student experience?

Students want a seamless customer experience from their college or university, one that more closely mirrors what they see from companies like Amazon and Uber. They want it to be easy to interact with their institution.

Leveraging CLM to Leave the Status Quo Behind

A Customer Lifecycle Management (CLM) system could provide the answer. Though two thirds of the acronym is the same, a CLM and a CRM are very different animals. A CLM is not a tool that can provide the marketing automation that something like Salesforce can provide. Instead, it digs below the surface and provides the rich intelligence, data and student centricity that buttresses and informs the entire back-end infrastructure (including your CRM). A CLM system is like an SIS on steroids—it is designed to handle everything a traditional administrative system would manage, while putting the learners' experience at the forefront and designing all processes around it.

A CLM helps bring the institutional culture of student-centricity into every workflow that goes into managing it, while providing massive gains in efficiency and automation that significantly improve the staff experience as well.

For today's colleges and universities, CLM systems are just what the doctor ordered. In fact, EDUCAUSE's 2016 Top-10 IT Issues list, Foundations for Student Success, highlighted "Next Gen Enterprise IT" with the following explanation:

> *"Developing and implementing enterprise IT applications, architectures and sourcing strategies to achieve agility, scalability, cost-effectiveness and effective analytics."*

A CLM system hits these marks with laser precision. Let's go through them in order:

Agility

Agility is a top priority for higher education institutions today. Being able to move quickly—whether it's responding to a student concern, adapting to new market conditions or ensuring website information is up-to-date—is central to a college or university's capacity to succeed.

Nowhere is the benefit of agility more keenly felt than in the launching of new offerings, and this space provides a great example of one way a CLM system can help schools move faster.

Taking new programs to market can be an arduous process—not because of a lack of ideas. The bottleneck often occurs as a result of the approvals process, where applications can get lost, deadlines can get missed and ultimately a market-responsive program can take years to finally get to students. By that time, you might have competition that wasn't there at the start of the process, or the landscape may have shifted—rendering a once-relevant program obsolete.

Automated workflows are one of the ways a CLM is different from a more traditional system. Workflows make these approval bottlenecks a thing of the past. By streamlining the approval process and ensuring that new or modified offerings are automatically routed to the right people at the right time, a CLM creates opportunities for the right people to review and approve offerings while ensuring nothing slips through the cracks.

Scalability

Growth is a high priority for every college or university outside the elite top strata. Institutions need to be able to deliver a better experience than they're currently offering to a greater number of students than they're currently serving. This may sound impossible, but through process automation and leveraging students' tendency to live online, it's a realistic and achievable goal.

For many schools, registration and enrollment processes are manual and paper-based. Even more schools simply moved their inefficient paper-and-pencil processes to the web—posting a PDF online, for example—rather than reimagining how the online enrollment process should work. And even today, across North America, schools are still processing payments manually on-site or over the phone.

This is ineffective in the modern environment. Students are seasoned customers and expect a sophisticated online shopping experience from everyone, colleges and universities included. This means providing students with an online shopping cart and self-service portal that allows them to browse offerings and manage their own course and financial information.

I could pontificate about the impact process automation has on the ability for an institution to scale for days, but it would be easier to simply share an anecdote. This is from an interview that one of our clients, Carolyn Young from Western University, conducted with The EvoLLLution shortly after her university implemented its CLM system:

> *"Every year we launch our new courses and programs in June. This year there was a function in our system that was very effective at reaching out to students who had expressed an interest in specific courses. On the first day we went live with all of our registrations, close to 300 emails were sent out to people who had visited our website in the past and wanted to be the first to know the courses were open for registration. Out of that 300, 150 visited the website right away within 24 hours and there were at least 50 percent of those people who signed up for courses. That went right to the bottom line and what was so exciting about that process was that no one on our team had to do any work around that; it was actually just a function in the system that sent out those emails automatically."*

A CLM bridges the gaps in the institutional infrastructure, taking the burden of repeatable (and automatable) tasks off staff. This allows the institution to serve greater numbers of students while also freeing up staff time so they can help students who have genuine issues that need solving.

By adopting a CLM, a college or university is able to deliver a better experience to greater numbers of students.

Cost Effectiveness

A CLM system ties disparate systems together into a centralized infrastructure that maximizes the ROI that institutions get from existing IT investments (as mentioned above) while helping to generate additional revenue.

At its simplest, by improving the conversion process that takes a student from interested to registered, a CLM can help improve an institution's enrollment numbers right off the bat. But by leveraging its massive intelligence-gathering capacity alongside its eCommerce best practices, a CLM system can do so much more.

A CLM system collects an incredibly rich and diverse amount of data that helps to paint a detailed portrait of every student who comes through the door. That data can be leveraged by staff who would otherwise have to consult numerous different systems to create a full picture, and would still likely miss out on key information (like a student's goals, employer, institutional touchpoints, financial information and more). With this rich data at their fingertips, staff can immediately provide a high level of personalized service that students expect.

This data can be leveraged to help generate additional business for the institution as well. For example, if a student has enrolled in multiple courses that lead towards a certificate, the CLM system can automatically encourage that student to enroll in the last few courses they need to earn that credential. Those are enrollments that, without a CLM system, would have only come about as a result of manual data analysis.

What's more, a CLM system brings business world best practices like abandoned shopping cart recovery to the table. This means if a prospective student begins to add courses to their shopping cart but then leaves the page before processing the transaction, the system will automatically reach out to them and allow that student to re-access the shopping cart they had already started building. Our internal figures show that this simple, automated process leads to a high rate of return for our client schools.

By bringing rich student intelligence and business world best practices to the forefront, the CLM system can not only help institutions make the most of existing IT investments; it can help drive revenues as well.

Effective Analytics

Finally, we get to effective analytics. After all, we're in an era where decisions based on guesswork have serious consequences. In a resource-constrained environment, postsecondary leaders must ensure that their resources—human, capital and IT—are being leveraged to their maximum potential to serve students in the best way possible.

Through robust reporting capabilities and an ability to visually represent data, a CLM system brings analytics to the table by making data understandable and actionable at every level of the institution. Leveraging dashboards and other visualizations that help to turn a spreadsheet into easily understandable trends and shifts helps administrators ensure they are responsive to student demands. For example, historic enrollment trends may show that a certain percentage of students will register for a course days before the cut-off, rather than weeks. As a result, leaders can know not to panic at low early enrollment numbers and maintain—or even increase—the number of sections they're making available to ensure students' needs are met.

This kind of information also improves institutional and divisional transparency, allowing leaders to defend sometimes-tough decisions—like cutting marketing campaigns to only invest in the ones that generate the most return (as they did at Stanford SCPD)—by being able to back themselves up with hard data rather than "a feeling."

When a division is being run effectively at every level—when resources are being properly allocated, when staff are fully informed, when the division is adapted to meet the tendencies of students rather than forcing students to adapt to the institution—it stands out from the crowd. Data is at the core of delivering an exceptional student experience in today's higher education environment.

Exceeding Students' Expectations with Next-Generation Enterprise IT

Higher education institutions are incredibly complex organizations. Massive numbers of staff, students, digital and physical infrastructure, external stakeholders and goals all must be balanced against each other and served properly. While many institutions have invested heavily in various tech tools and systems to help guide the ship, the gaps between these systems still force administration to be institution-centered rather than student-centered. This means, traditionally, students have had to lower their expectations to fit the limitations of the institution, rather than the institution raising its level of service to meet students' expectations.

The time for student-centricity, however, is now. And a CLM system that helps to raise the IT infrastructure of the institution up to the level that students expect is critical to making a modern-day institution truly student-centric.

CLMs help institutions get away from the status quo that led to all the dissatisfaction discussed earlier and bring their back-end systems into the limelight.

TECH TOOLS AND RESOURCES

Foresight and Commitment: What It Takes to Deliver a Leading Student and Staff Experience

MICHELLE FACH
DIRECTOR OF OPEN LEARNING AND EDUCATIONAL SUPPORT,
UNIVERSITY OF GUELPH

We spend a great deal of time trying to understand the ingredients that compose a great student experience. Depending on the students they serve, some institutions turn to amenities like climbing walls and lazy rivers, while others look at ways to make the academic experience more flexible. But what does it take to deliver a great staff experience too? And what impact can that have on the all-important student experience? In this interview, Michelle Fach reflects on how she and her colleagues at the University of Guelph Open Learning and Educational Support (OpenEd) work to deliver a leading experience to non-traditional students and shares her thoughts on the role customer lifecycle management software plays in supporting that work.

The EvoLLLution (Evo): What were some of the reasons behind Guelph OpenEd's decision to explore new management systems?

Michelle Fach (MF): One of the drivers was that the system we had in place was developed and customized in-house approximately 20 years ago. In order to take advantage of advancements in technology, we needed to move away from our customized solution and adopt a solution that transforms the learner experience, integrates with various institutional systems, and provides rich data and improved workflows.

Access to the improved services was another reason behind our decision. We were able to give students more control over their experience. We could create internal efficiencies for the department so that we can eliminate the need for paper, eliminate the need for multiple steps, and other major inefficiencies.

One of the other reasons behind my decision was the consolidation of functionality. There are a few different systems that were facilitating all of the work that our new system does. For example, we had a website that displayed some of our course offerings. Our English Language

Program had its own international student database. With Destiny One, I can eliminate the need for multiple, disparate databases and bring all that information into one environment.

Evo: What was the vulnerability created by sticking with your homegrown system?

MF: We have had a single developer supporting our system for the last 20 years. It was written in PowerBuilder and even though we had a SQL back end, the front end was still PowerBuilder. 20 years ago, there were lots of PowerBuilder programmers, but our expertise in that programming language was not maintained. Ultimately, if something happened to that individual developer, we would not have support for our system. That was a significant vulnerability.

Additionally, we would have had to re-develop the entire system from scratch in order for it to provide the student-facing functionality today's students expect. Although we had built functionality that provided an online interface, the actual system wasn't web enabled, so to make it web-enabled—to create that student experience that we were looking for—it would have had to been built from scratch.

With Destiny One, I can eliminate the need for multiple, disparate databases and bring all that information into one environment.

Evo: How will the new system allow Guelph OpenEd to expand its stakeholder groups?

MF: At Guelph University, most of the continuing education work is centralized but there are some units that are offering their own CE programming separate from OpenEd. So we plan to roll Destiny One out of them to support their needs and provide these departments with the ability to work with major corporate partners like Loblaws or Maple Leaf Foods to offer that high-end corporate experience through Destiny's Corporate Module.

We're also exploring how we can support registrations that are internal within Guelph. Our HR department conducts a lot of its own staff development and those programs, courses and sessions are available to staff throughout the university. Rolling out that functionality would be valuable for them because they would be better able to manage the registration aspects of these professional development offerings.

Evo: What were a few key challenges Guelph OpenEd staff faced when serving specialized non-traditional populations, like Intensive English Language program students or corporate employees?

MF: There were a number of challenges our staff faced in serving specific non-traditional populations. The systems that they were using were not flexible or scalable and they had a lack of access to data.

It was difficult to make informed, evidence-based decisions on markets and trends because the data was sitting in multiple systems. It was difficult to really get a good picture in a timely way. This is especially challenging for us because, as a cost recovery department, we run like a business and timely information is really important. The process of making data-driven decisions was very challenging and labor intensive.

Additionally, the fact that the systems we used were mostly not web-enabled meant we had a number of other systems—like registration systems—built on top of our core system to facilitate different functions. This meant we always had to deal with numerous integrations.

At its core, different populations expect different services and so we were using multiple systems to facilitate and meet those expectations. Trying to manage a business this way becomes challenging and you just can't scale.

Evo: What were some specific aspects of the student experience you were trying to transform?

MF: At its core, we wanted to give students more control over their own experience. For example, if a student wanted a copy of a receipt, or they wanted to get a copy of a grade report, they would have to send us an email or fill out a form and then we would print out the document and send it to them. Students no longer have to engage with a staff member to get their documentation. We're giving students more control over their experience with the university. Now, students have 24/7 access to their full academic history so they don't have to wait to get a hold of a staff member to ask for a copy of something. They just login at a time and place that is convenient for them.

This shift is totally aligned with the values and the reason for our department, which is about promoting and creating access. We're about responsiveness, timeliness, improving access, and allowing students to control their own experience. We want to continue to be known for our student support and service and in order to do that, we must continue to anticipate and exceed their expectations. Students have choices with respect to where they enrol for continuing education opportunities. We want to be their first choice. We have high-quality academic standards and our service standards must be aligned. We pride ourselves on the quality of service we deliver and the personalized support that our staff provides to our clients, and Destiny aligns with that vision.

Evo: What are some of the central characteristics of a great customer experience for postsecondary students?

MF: There are a few key characteristics that define a great customer experience for postsecondary students, and chief among them are approachability of staff and the system. We need to create an environment where students don't have to go to multiple spots to get one piece of information—or to get different information on the same question from multiple sources.

It can be intimidating for adult learners coming into a postsecondary environment to take a course. Some individuals have never come to university so the whole experience is intimidating and we need to remove those barriers. We need to remove the fear and combat their concern that they don't belong here because they absolutely do—they make the environment richer. We need to be approachable, available and responsive. We can't make people wait for information. We must provide them with accurate, important information in an easily digestible way. We can't leave them to read through 50 pages to get to the information they need, and then leave them to try to figure out if that actually applies to them. We need to provide them with a supportive environment.

Evo: How have staff reacted to the shift to the new software?

MF: As a senior leader, there's always a level of concern around change management when introducing a new system. We've had our old system for 20 years, and we knew we were going to have to change some processes and some workflows.

However, our staff were very excited, open and willing to make the changes necessary and to do things differently, so that was a real added benefit. They were excited about the opportunities it would provide students and how it would change the nature of their work. They really see how this shift is going to allow them to add value to the student experience in a different way. They fully adopted it and I don't have any concerns at all with respect to staff trying to go back to the old ways.

We only implemented at the beginning of October 2016, so we've only really been live for a few months, but we immediately saw efficiencies. In terms of people's work, the numerous steps staff once had to take to help facilitate a registration or respond to an inquiry have now been automated and taken off their plates.

Evo: How are those efficiencies improving staff satisfaction and time use?

MF: People's roles will no longer involve moving paper around. Instead, they're actually getting into the environment and getting caught up on things that they weren't able to get done in our previous system.

I think what will happen is there will be less time spent on routine administrative tasks and more on services that add value to the learner experience.

As we reduce the number of administrative tasks, my administrative costs will reduce. My staff, in some ways, will need to evolve and because they'll be providing expertise and service in a different way—and in different areas—which is great because I've got a keen group of people that want to learn, develop and grow. Am I going to need staff sitting at a registration desk five days a week for eight hours a day? No, that time will probably be cut in half and they'll be supporting other aspects of the department.

What's more, all staff—be they managers or curriculum development support personnel—will have more data and evidence on which to base their decisions, practices and programming.

Ultimately, we want to grow enrollments and we want to grow programs and now we're going to be able to do that without actually adding more cost to the bottom line.

Evo: How much of a concern is it when an institution puts a process change into place for staff to simply ignore the new business process and why is this different?

MF: You would think that it shouldn't be that easy for staff to revert to the old ways of doing things but there are individuals that have been doing their job a certain way for a long time and just don't really want to—or they fear—change. They get concerned about how a new system or new processes are going to affect them and their job. As such, they oftentimes can put up barriers and create excuses for why they don't shift to the new process.

That happens lots in organizations, but there a few reasons why I don't think it happens here. Part of it is culture. We have a responsibility as cost recovery unit to continue to evolve in order to remain viable. If we don't continue to evolve and improve we're not going to be around, and our staff see that and know that, so they really want to invest in the ongoing development of the department and the programs. The staff here also care greatly about the student and the faculty experience—they're care about their jobs and they feel a sense of ownership.

Evo: With the ability to focus more on quality programming and other differentiators and with the ability to deliver a student experience that more closely mirrors what they're used to, how do you see the role of Guelph OpenEd changing within the broader university structure at Guelph?

MF: OpenEd will continue to be seen as innovative, forward-thinking, focused on students, responsive and nimble. We've always been known for that but I think Destiny One will only enhance that reputation. In fact, I already see that. Our commitment to enhancing and supporting the student experience through this type of technology is being recognized by other departments at the university. They are getting excited about this functionality and want to know how they can take advantage of these opportunities as well

I was talking to a Department Chair and I told him, "I've got this new system in place and it's going to have a corporate module." He wanted to know more so I wrote up one-pager for him talking about the corporate module. He was just thrilled about the possibility because this is something that he could really see adding benefit for him when he is working with corporate clients.

OpenEd is the only place where these kinds of conversations are happening. Without a doubt, we will be a leader on this campus in those areas and we'll be seen as the place to go for supporting lifelong learners.

This interview has been edited for length and clarity.

OPERATIONS AND EFFICIENCY

Automations and Business Process Improvements Critical to Student Satisfaction

JACKIE ANDERSON
MANAGER OF PROCESS IMPROVEMENT, ILLINOIS INSTITUTE OF TECHNOLOGY

Business process changes and improvements have a tendency to be looked upon as negative distractions by the folks they impact. After all, you're forcing people who've been doing their jobs—in some cases for 20-plus years—to do that work differently. However, far from putting people out of work, business process improvements and automations allow staff to better use their time and resources to deliver the kind of experience that makes a difference to students. In this interview, Jackie Anderson reflects on the impact business process improvements can have on the staff experience and on student satisfaction.

The EvoLLLution (Evo): How does the staff experience impact the student experience an institution is able to deliver?

Jackie Anderson (JA): If staff are not willing to change and react to the existing students that are coming in—because they change every year, there's a different type of student in your institution all the time—the students are adversely impacted because they're not getting the things they're expecting from their university.

When the staff don't embrace new technologies or try to incorporate student input into how they're operating as a unit, it also impacts students in a negative way. Students are meeting with staff all the time; they're the first point of contact. Even if it's not for advising, the moment they step on campus they're meeting with resident advisors, people who are working in housing and the staff coordinators in their departments, and these are the people who have boots on the ground. If the experience they're having with those staff is not positive, it turns the students' experience negative from day one.

It's important to note that staff are meeting with students on a regular basis, but most of the time they get disregarded. Senior leaders tend to prioritize the faculty-student interaction over the student-staff interaction, but the staff are what keep the students here and happy. They're helping them with financial aid, they're helping them get in with admissions, they're helping them figure out their room selection and they're helping them with their advising.

Everyone is impacting that student experience and I really think that without having staff on board with what the university mission is and how the university is operating, it really makes the students feel like they shouldn't be in the university that they're in. The staff experience is essential to how the student's experience is going to go. When I think about business processes, staff have to be on board with change because again the students coming in every year are different and being able to accommodate those differences every year is important to keep the student experience positive.

Evo: How does a great staff experience impact the institutional bottom line?

JA: If the staff are not embracing the institutional mission with the understanding that everything they do impacts the student, it ends up making the student experience less advantageous than what it should be. That has an impact on the university through students' willingness to engage as alumni, whether it's through giving back, volunteering, etc. That ultimately impacts the bottom line because it's connected to improving admissions and retention.

Evo: What role does business processes improvement play in the staff experience?

JA: It's critical to the university to have business processes done well, and it's one of these factors that people generally don't think about. I've seen lately that several departments are trying to solve a problem without realizing that if they change their process, the issue would resolve itself. In particular, we have several units that are trying to purchase stuff from different vendors, but they don't realize that we may have something on campus that is already working that can help them. I honestly feel that if every university embraced looking at business processes they would probably save a lot of money on the bottom line. Even just the day to day, how does the student flow from coming into the office and leaving, what does that look like? Changing that may seem like a lot of work but in the long run it ends up helping staff by allowing them to serve more students in less time.

I have written previously about how there's a really low willingness to change in higher education because people feel like if they automate they're going to be replaced. It's almost like the robot experience and the automobile industry where factory workers were replaced. In reality, change just means that rather than processing paperwork you could be serving students. Business process improvement is vital in any institution.

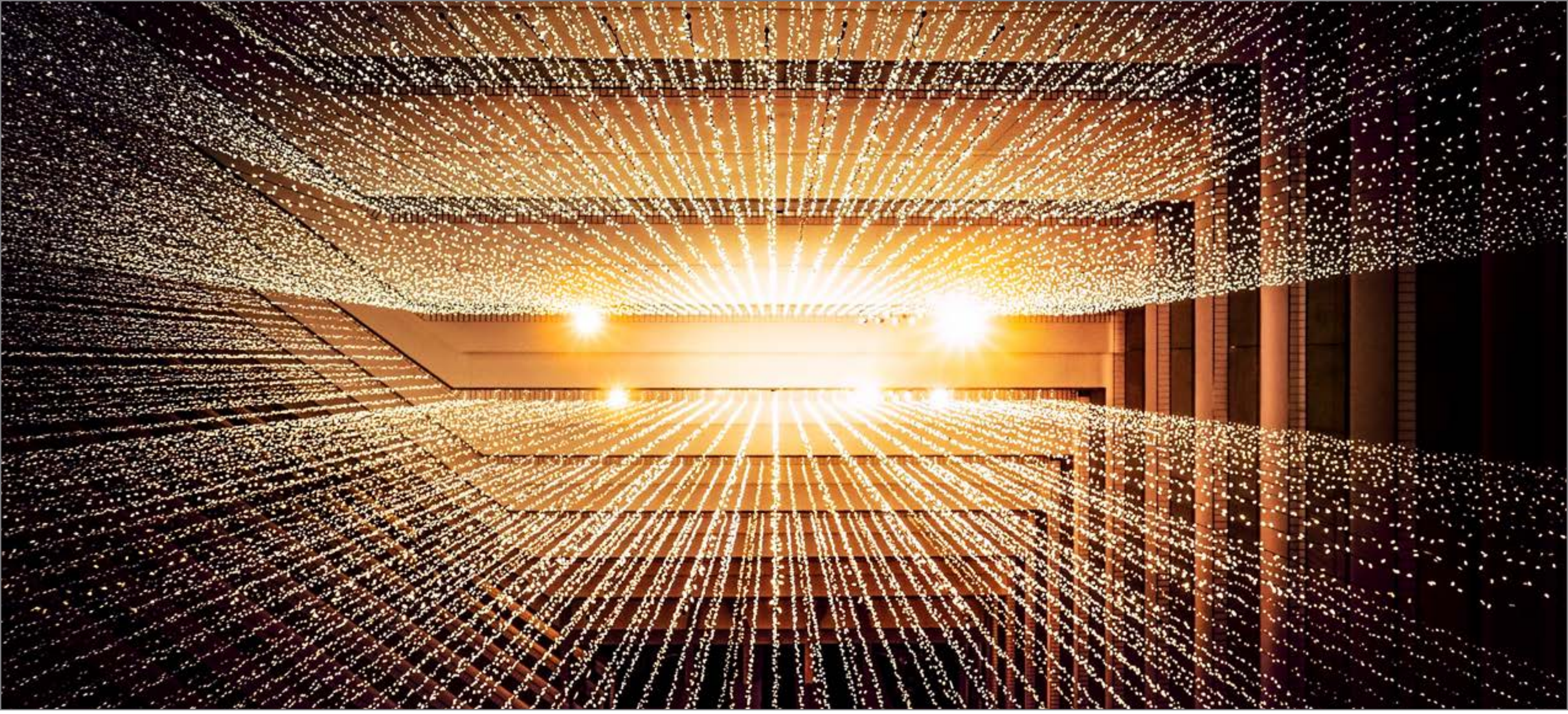
Evo: How can technology—especially administrative systems and tools and the revised business processes they bring to the table—change the day-to-day priorities of institutional staff?

JA: If it's embraced at the senior leadership level, where we're going to improve the technology footprint on campus to improve the student experience, it changes how staff operate. It really changes institutional culture. If senior leadership are implementing new processes then staff can make it a priority as well, and when the changeover happens everyone is on the same page and the bottom line is improved student service. Again, this goes back to embracing the technology that's already purchased. The bottom line of all this stuff is that it's helping improve the service provided to the students, which is why people work in higher education.

Evo: Is there anything you'd like to add about the impact that business processes have on the staff experience and by extension the impact that the staff experience has on student satisfaction and success?

JA: Staff are often overlooked when we talk about delivering a quality student experience. What I've seen on our campus is that staff are really dedicated to students but they feel like they don't have enough time to do the things they need to do. Efficient business processes can alleviate a lot of the stress that some of our staff are having so they can spend time focusing on what their supposed to be doing—helping students—instead of on paperwork.

This interview has been edited for length and clarity.



TECH TOOLS AND RESOURCES

Where Technology Goes, So Too Must Culture

HEATHER CHAKIRIS
DIRECTOR OF STUDENT AND ALUMNI SERVICES IN EXTENSION AND GLOBAL ONLINE, UC LOS ANGELES

The shift to a student-centric institutional culture shows many different forms, from changes in curriculum design to shifts in service availability to the improved leveraging of data. From the perspective of students, one major tell that an institution has transitioned to a greater level of student centricity is in the personalization of communications and outreach, and CRMs have a massive role to play here. But the implementation of a tool does not a culture create. In this interview, Heather Chakiris reflects on the benefits CRMs bring to the table when it comes to delivering a personalized experience to learners and shares her thoughts on how the implementation of a CRM system must be accompanied by a broader culture shift to be truly effective.

The EvoLLLution (Evo): When it comes to attracting and serving non-traditional students, how can an effective CRM make life easier for administrators and staff?

Heather Chakiris (HC): A Customer Relationship Management (CRM) system can improve recruitment and engagement for all students. In my opinion, there is a growing danger in referring to college students as either "traditional" or "non-traditional." The students typically referred to as "non-traditional" are fast becoming the new majority on college campuses, as rising tuition costs require more and more college students to work at least part-time in order to afford higher education. Categorizing this important population as "non-traditional" reinforces an otherness—a sense of "you don't belong here"—that only serves to make these learners feel like they have failed before they even got started. Time to change that!

When implemented fully, a CRM can enable personalized, automated communications, track the history of those communications, anticipate what communications a student may need based on their behaviors, and provide a complete 360° view of a student from prospect to alumnus. It is also possible to implement only part of a CRM system—for example, I have seen CRM systems implemented in marketing and/or admissions offices for student recruitment and conversion, but only as a method of automating communications. In other cases, I have seen

CRM systems integrated with contact center solutions and student information systems—and even predictive data systems—to identify segments, forecast student actions, and assist in developing the lifetime value of each student. These are all key to delivering a completely personalized experienced for each student from lead generation to graduation—and beyond.

One question I have heard raised frequently at the beginning of various CRM implementations—and it is a valid one—has been, "What about privacy?" CRM's are typically role-based. The information housed in the system is not open for everyone to access freely. It is possible, for example, to set up permissions so that the marketing team can see info for prospective students, but then once the student applies only the admissions team can see the full profile, then once the student matriculates and enrolls only the academic advisers can see the full profile, and so on. This is a very broad example, but you get the general idea. The key, which I have touched on below, is that, prior to implementation, all stakeholders should partner together on what the complete experience will be for students being served by the CRM. It is a big mistake if each stakeholder group develops their workflows in a vacuum. To do so runs the risk of having a student experience frequent touch points as a prospective student, few to no touch points as an applicant, frequent touch points if they are a business student, no touch points if they are an education student, and almost daily touch points as an alumnus. Students should not be held hostage by internal institutional politics and silos. As far as they are concerned, they signed on to one institution. One brand promise. It's the institution's responsibility to honor that promise.

Evo: What does it take to set up a CRM system to serve its unique role in a higher education organization?

HC: The first and most important point to make is that a CRM system is simply a technology tool. If an institution implements the tool without also creating a CRM *culture*—from the executive suite to the front-line service teams—the opportunity for true impact is lost. A great place to start is by mapping the current student experience from the *student's* perspective. Too often, higher education institutions make the mistake of thinking they know what is best for students—and certainly, in some cases they do; for example, pedagogically. From a service and an experience perspective, however, the institutions who get this right are the institutions that take the time to map the experience from the students' perspective qualitatively and quantitatively. Where are students saying they are falling through the cracks? Where is the institution not honoring its brand promise? What is the student experience like seeking help via e-mail, phone and web? Be open to learning your weaknesses. This is the most exciting part! Having this knowledge can help the institution to determine the desired future state, which is critical in informing the CRM implementation.

Second, what is the organization's Strategic Enrollment Management plan? From prospective student through alumnus, are your students having a consistent experience from recruitment to conversion, matriculation to retention, completion to alumni status? Who are the owners of the different phases? Are they working together to ensure a consistent experience from start to finish or is the experience changing each time the student enters a new phase? What policies and processes need to change to enable this future state to happen? Whose buy-in is required? What will success look like after implementation? Start with the end goal in sight and work back.

Next, the entire process of selection and implementation must be cross-departmental and collaborative in nature—genuinely cross-departmental and collaborative, with all parties committed to mutual wins. Identify a project owner—ideally the person responsible for Strategic Enrollment Management—but also ensure stakeholders are at the table helping to develop user requirements, workflows, and a plan for implementation. The stakeholders must be empowered to make decisions on behalf of the units they're representing, so—with something as important as a CRM implementation—identify your most engaged people, not your most available people. Move lower-priority projects off their plates in order to allow them the capacity to focus on the implementation.

In a small continuing education environment, an ideal structure might comprise one representative from marketing strategy, web services, admissions and/or advising, enrollment, internal IT, and program planning.

Larger organizations might want to include a career services representative and/or alumni affairs, student technical support, etc. Be inclusive, but keep the team small and nimble. No more than eight to ten people. There can always be smaller subgroups created later to complete specific parts of the implementation.

Evo: Where are the limits of a traditional CRM in serving non-traditional and non-credit students?

HC: If there are limits, it is not because of the category of students served. As mentioned earlier, there is no reason to differentiate students as traditional or non-traditional, credit or non-credit. They are all individuals with expectations and goals. Just as email might no longer be the best way to communicate with a 20-year-old on-campus student, it might also not be the best way to communicate with a busy 35-year-old registered nurse. This is where the importance of the experience mapping comes in. How do your students want you to communicate with them? Today's CRM systems are typically pretty dynamic in tracking diverse communication methods, including SMS (text).

The limits of a CRM system are typically placed by the institution or by the system itself. Factors impacting how a CRM can be implemented might include how and where institutional data is stored, whether the other systems that need to "talk to" the new CRM have open APIs, whether the server architecture is robust enough to seamlessly facilitate data updates in real time or (at longest) daily, the cost of partial vs. full implementation, and so on. A CRM has the potential to help to build affinity between student and institution whether a student attends part time or full time, is undergraduate, graduate, or non-degree, or takes credit or non-credit courses.

Evo: How could CRM systems evolve or change to better allow colleges and universities to serve their non-traditional audiences?

HC: My first piece of advice applies to CRMs in general and not specifically to a student audience. The CRM system must be easy to use. If the UI/UX is poor—if it is not intuitive for staff members—system adoption will not happen. If the system is not stable—if it crashes, fails to support attachments, delays delivery or sending of communications—system adoption will not happen. The mapping exercise that can show where a student is falling through the cracks is also going to show where an institution's internal infrastructure is failing. As important as it is to have a solid understanding of the student experience, it is equally important to understand the staff experience. They are customers, too.

Second, the more efficiency the CRM system creates—the more seamless the interactions—the better. Does it integrate with calendars so that student appointments, events, etc., can be scheduled via the CRM and appear on both the student's and staff member's calendars? Does the CRM have a mobile platform? An app? With what office applications does the CRM integrate out of the box?

Finally, I'd like to end at the beginning. A CRM is only a tool. If an institution invests in a CRM system but uses it only to conduct *transactions* with students, there are likely a lot less expensive ways to do that. To realize the true benefit of a CRM system, however, an institution must first devote time and energy to developing an internal culture of *relationship building* with students, regardless of age or life circumstances. Welcome student praise, but welcome their critical feedback even more. Be vulnerable. Show responsiveness.

If there is one thing an institution of higher education can leave its students with when they complete their academic journey, it is the feeling that the institution invested as much in the student as the student invested in the institution. A CRM culture and system can be a great first step in getting there.

Chapter 3

Data and a Strong Back-End: Supporting Students in the Modern Era

RETENTION

Student-Centric and Data-Driven: Designing the Institution to Support Success

CHRIS BUSTAMANTE
PRESIDENT, RIO SALADO COLLEGE

The conditions in the two-year college environment have changed significantly in recent years. Many of these colleges are open-enrollment institutions, however their goalposts for success have shifted from access to completion. At the same time, state funding has declined significantly, but given the demographic these institutions serve and government regulations, making up that decline through tuition increases is challenging and, in some cases, impossible. In this interview, Chris Bustamante reflects on how his college has recalibrated to ensure they're helping students meet their goals in this challenging environment.

The EvoLLLution (Evo): Why has the focus on student retention and completion at two-year institutions grown so much in recent years?

Chris Bustamante (CB): The focus on retention and completion has grown because our accreditors and the federal government are holding us more accountable. There's a broader interest in ensuring that students are completing their programs, preparing them for the labor market, for university transfer, or for a certification or credential that has market value.

This is something we've been working on at a local and national level. The American Association of Community Colleges published the report, Reclaiming the American Dream several years ago that addressed the fact that for many years community colleges mainly focused on access with more limited attention paid to retention, persistence and completion. Today, there is at least equal—if not more—emphasis on persistence, retention and completion, and that focus is grounded in data that guides our progress.

In Lumina Foundation's Stronger Nation report, it states that in Arizona alone, nearly 900,000 adults have some college credits but no degree. We need to address this need by helping people gain college credit for their knowledge and experience through options such as credit for prior learning, credit by exam and other offerings—which will help propel them toward a credential or degree and, at the same time, raise the attainment level of our region and our state. Our state has an attainment goal of 60 percent and is currently at 42 percent, so we're working toward increasing that attainment rate not only for our own institutions, but on behalf of the state of Arizona.

Also, when it comes to the increased focus on retention and completion, I think it has grown in recent years because resources are more diminished than they have been before. In Arizona, urban community college districts receive zero funding from the state. They no longer provide funding to us, so as a result we're having to refocus our energy on maximizing the effectiveness of the resources we receive through tuition and property tax revenues and as we all know, it is more cost-efficient and productive to retain students than to recruit new ones.

> Today, there is at least equal—if not more—emphasis on persistence, retention and completion, and that focus is grounded in data that guides our progress.

Evo: What are some of the unique challenges open-access institutions face when it comes to retaining and graduating students?

CB: Community colleges accept 100 percent of the high school graduating class every year. Yes, providing access is critical and our challenge is to serve everyone the best that we can, but we also need to work harder to support persistence, retention and completion efforts. We can do that if we're not trying to be all things to all people. In the Maricopa Community Colleges system, we have 10 individually accredited colleges, which each focus on those areas that they do really well.

At Rio for example, we work well with online students, workforce partners and workforce development, under-served populations, early college students and prison populations. We are the largest single provider of online education with more than 27,000 online learners every year. We have more than 7,000 early college students through 42 high school partners in the local K-12 system. We have nearly 30 business and industry partners participating in credit-for-training programs and we also have a corporate college for non-credit customized workforce training which has served nearly 100 business, government and industry partners since it was created in 2013.

We're really focused on finding our place within the ecosystem, and more institutions need to do that too—especially when it comes to identifying what they do well. We know what we do well, and want to build on that—so we refer students across the system depending on their needs and the offerings that are available. For example, if someone comes to us looking for healthcare training in sonography or to become a physical therapy assistant, we recommend them to Gateway Community College, which is four miles from us and specializes in healthcare fields.

At Rio we create access and provide general education courses—especially if students need the flexibility we can provide—to take care of their prerequisites or fill program requirements toward a degree at another college or university. We also have a few unique ways to remove barriers and provide flexibility for our diverse student populations. Rio has more than 44 start dates a year and we guarantee that we will never cancel an online class, so that students can depend on us to provide the classes they need to complete their program. We built our model to be scalable and serve many people, and educate nearly 55,000 students every year across all our markets, which is impressive for one college to do.

Evo: Is the graduation rate necessarily indicative of student success, given the growing value of alternative credentials like certificates and the number of students who transfer to a four-year institution before earning their associate's degree?

CB: We have focused on certificate programs for a number of years, and those certificates through a stackable credentialing model, can lead into a degree program. In fact, the vast majority of credentials that students earn with us are certificates, not degrees. Last year, we awarded 675 associate's degrees, 4,832 certificates, 316 Arizona general education curriculum awards—those are the GenEd curriculum awards—46 academic certificates and 253 GEDs that help under-served populations bridge to higher education or other credentials.

We also had 7,277 transfer students transfer a total of 183,730 credits just last year to Arizona's public universities. That's the power of understanding who you serve and the important place you hold in an ecosystem. Arizona has only three public universities, and our community college system has established seamless transfer and articulation agreements which make it easy for students to transfer credits. So, once a credit is earned and transferred, it's automatically accepted by the universities.

These transfer agreements also make a big impact on our dual enrollment students, who graduate high school with numerous college credits. Last year 64 Rio Salado dual enrollment students earned an associate degree before graduating from high school. Transferring their credit hours to the university is critical because it accelerates their time to completion and saves them and their family money.

Good transfer articulation pathways between community colleges and universities make a huge difference for completion, especially through online concurrent enrollment programs where students take courses with us to fulfill degree requirements beyond high school to complete their degree or credential at another institution. Of course, these kinds of enrollments are difficult for us to receive credit for in terms of how we're helping students complete their credentials. That is why data systems between institutions are really important statewide and nationally. We need to have these systems in place so that we know how we have contributed to helping students complete their program of study.

Rio has provided a number of ways to help people to get into the workforce, and a number of other ways that allow people to overcome their barriers by making higher education more flexible and affordable. These systems are critical to creating a wider understanding of the impact different institutions make, especially at the community college level.

Evo: With so many students varying so significantly by demographic and goals, how do ensure that your institution is able to deliver a personalized experience?

CB: Rio strives to ensure that students have the support they need within their programs and courses. We have teams dedicated to specific student populations—such as, online, dual enrollment, incarcerated re-entry, for-credit occupational programs, active military and veterans—to focus on what we can do to improve their experience. We also believe in a continuous improvement process here. We're big believers in Total Quality Management and business processes. We call it the plan, do, check, act cycle—ensuring that what we do is evaluated and improved upon.

Gaps are identified from student feedback when reviewing systems and processes, but are typically discovered through the use of data. We collect and analyze data to tell us where gaps might exist and where we need to shore up our support for students, curriculum, compliance and more.

To support these efforts, we have a number of systems working together. We have our learning management system, RioLearn, which improves the flexibility and convenience of online learning and helps scale access and support mechanisms for individuals who are looking to earn a degree or certificate. We also built a degree map called Rio Compass that helps students and staff ensure that students stay on track to completion. We have analytics through our RioPACE system, housed within RioLearn, and an additional dashboard that helps students track their class progress. Using analytics to provide these insights range from strategic to granular, helping us to deliver these kinds of personalized experiences and interventions at scale.

Our faculty are also very involved, ensuring that they can deploy interventions based on individual student engagement and historical data from previous students who have been successful in the course. This data also helps us improve and track how our services are making a difference on persistence and retention. The Gates Foundation, through an EDUCAUSE grant, helped us to focus on student success, shore up our processes, enhance and develop systems and outreach to students, and ensure that we are providing high-touch services when needed. We also have peer mentors to reach these students, providing support when necessary. As part of the grant we set goals to improve year-to-year persistence and increase associate degree completion rates by 50 percent within five years for Pell-eligible students. It's a tall order but it is certainly a goal we're working toward achieving.

There are also a number of other grants that we're involved with that are helping us to build upon what we learned. We usually pilot a new initiative with a cohort of students and once we've learned what works, we then expand it out to the rest of the student population. We'll hit and miss, but when we get it right, we scale up these innovations. That means we're always in this experimentation phase exploring new ways to serve students better online and in-person.

Evo: How would you respond to criticisms of student success initiatives that claim students shouldn't gain a postsecondary credential if they're not able to find critical resources by themselves?

CB: Awareness of student resources is being pushed out initially to our students through student success seminars and New Student Orientation which familiarizes them with RioLearn, student services, and best practices of how to be a successful learner. We know that people come to us who haven't been to college before, or perhaps it has been a long time, and don't always know what resources are available to them. Even when I was a community college student, one of the challenges I experienced was understanding what was available to me. There were people that I could reach out to—there were advisors, an advisement and a tutoring center—but you had to look for those resources.

It's important we make sure students realize they don't have to go it alone and be aware of available resources so that they can be well equipped to achieve their goals. They still have to get through their program, make the grade, and earn their credential or certificate. We know that students who don't persist and complete feel that they have a barrier that they can't get around. That's why at Rio we have the flexibility of more than 44 start dates a year. That's also why we have a scholarship fund to help people with small expenses when they need it. We have many kinds of mechanisms to help people get around their barriers when life gets in the way.

Frankly, if you're in this work but are not fully committed to student success, then you are not going to be successful and neither are your students. This is a commitment that we make to our students, and in return we ask that they make a commitment to successfully complete their programs. We all benefit from this. The first-generation student breaks the cycle for their whole family, and then others use them as a model to pattern their lives after. This work gives you a sense about what is really important, connecting the dots for people to have an opportunity to succeed.

Evo: What advice would you share with other two-year college leaders trying to drive persistence and completion rates at their own institutions?

CB: What is most needed is to listen and focus on the needs of students. Then, build programs and staffing around those needs, remove barriers, and provide the support needed for them to achieve their goals. Too often, higher education institutions place their own needs first and then hope that students will come, based on the schedules and programs they choose to offer. We also need to review the research and studies that are available to identify best practices which positively impact retention and completion, and then employ those strategies within our organizations.

Additionally, it's critical to be data-driven. Have the data speak about what is really needed, identify where students are on their pathway, how many are persisting, being retained, and how that is impacting completion, and this all leads to the goal of helping your region's economic growth.

Helping people obtain meaningful jobs that matter for your community is one major reason why we are here, so if we can connect all those dots, it is really about investing in our students and our communities. Sometimes that takes a lot of restructuring, refocusing and retooling, but if you've got your sights set on the right things, and you learn a lot along the way, and you do more of what works, you will succeed.

This interview has been edited for length and clarity.

METRICS

Got Data? Leveraging Analytics to Drive Institutional Success

JAVIER MIYARES
PRESIDENT, UNIVERSITY OF MARYLAND UNIVERSITY COLLEGE

As budgets get tighter and expectations get higher, leaders at colleges and universities across the United States are trying to understand how to keep their institutions viable, successful and able to serve students. For many leaders, finding the answer likely starts with improving their use of data. Data analytics and business intelligence remain peripheral at many institutions today, but for institutions that have leveraged these tools the benefits have been significant. In this interview, Javier Miyares shares his insights on the value and impact data can have for senior college and university leaders.

The EvoLLLution (Evo): Before the explosion of big data and analytics gathering and analysis, how were major strategic decisions made at the senior level?

Javier Miyares (JM): The university previously relied on a silo approach to collecting and interpreting data, with functions such as enrollment management, financial aid, student support services and marketing each supplying information to senior leaders, who would in turn make strategic decisions.

In 2012, with UMUC (and all of adult higher education) facing what I termed a “perfect storm” of rising costs, declining state support, a mature market, increasing competition, and further cuts to education spending in the military and corporate sectors, we looked to analytics to help guide the university along the pathway of stability and growth.

We established a data analytics unit by consolidating and augmenting functions that already existed at UMUC. With the availability of technology, inexpensively robust computing power, and massive data storage capabilities, we built an infrastructure to collect and process enormous amounts of data. We also hired experts in data analytics. The team’s first order of business was to identify core questions that we needed to answer to get us back on a positive path.

I was confident that we were ahead of the curve in building a fully independent analytics unit when I read a 2016 opinion piece in *Forbes* magazine, *Big Data's Coming of Age in Higher Education*, which argued that "the application of data-driven decision making has begun to permeate all aspects of campus life and operations," and that the year, in retrospect, may be seen as "the jumping off point for policies and practices that define higher education in the digital era."

We now have the ability to take data from different sources within an institution and with different attributes, to drill down further, and to come up with solutions to problems.

Evo: How has this process evolved as more data has become available to senior leadership?

JM: It is no longer a luxury for institutional leadership to have data analytics capabilities. The ability to look at data across an organization—in a much more holistic way—in order to gain efficiencies is a necessity. We now have the ability to take data from different sources within an institution and with different attributes, to drill down further, and to come up with solutions to problems. The combination of our platform, the dashboards we have developed, and the expertise of our analysts, has introduced significant efficiencies in reporting while increasing opportunities to facilitate meaningful and strategic conversations across the institution.

Our leaders now depend on the capabilities of our analytics team. In fact, our leadership holds a weekly meeting of representatives from a variety of teams that work with new and prospective students—marketing, military operations, community college outreach, regional site teams and others. The data analysts participate as equals.

With such large and varied bodies of data, it is important to note that our data analysts are not just "number crunchers," but highly trained professionals who use social sciences, economics, finance, marketing and other subject areas to help them interpret the data and tell a story.

Evo: What are a few examples of decisions and changes made by senior institutional leaders that are supported and improved by the availability of data?

JM: At UMUC, data scientists initially worked together with outside vendors to analyze millions of records and hundreds of behavioral and experiential variables and uncover trends that have helped increase student success—including the ability to predict with greater than 80 percent accuracy on the first day of class whether a student would pass or fail. This allows us to reach out to at-risk students before they get in trouble. We also changed our registration policy when we learned that students who waited until the last minute to enroll were consistently at the highest risk of subsequently withdrawing or failing. UMUC now closes enrollment four days prior to the first class meeting, while a grace period of four days after the first day of class allows a student to withdraw without a financial or academic penalty. The results have been dramatic. Undergraduate completion rates rose 7 percentage points over four years, while retention rates increased by 4 percentage points.

Through the use of data analytics, we are smarter about—and better able to target—our spending, as well. As a result, we were able to increase new student registrations in the U.S. by 20 percent while reducing recruitment expenditures by 20 percent in fall 2014 as the university was recovering from unprecedented enrollment volatility that began in 2012.

Evo: At a purely practical level, what are the benefits of dashboards for institutional leaders?

JM: UMUC has developed and evolved a technology platform that encompasses data from across the university. The platform allows for increased visibility into the connections between student outcomes, tuition revenue and expenses. The data is then presented via a series of intuitive and interactive dashboards.

For example, we can look holistically at the performance of a particular academic program. The dashboards allow us to compare key metrics across programs and to compare against internal and external benchmarks. We can make better decisions about where to focus our resources.

Dashboards are key as we look at all phases of the student lifecycle, from the effectiveness of our marketing efforts to attract students to supporting them as they work their way to a degree.

Evo: Looking at the counterpoint, what are some of the limits of the usefulness of data when it comes to managing an institution as large and diverse as UMUC?

JM: One of the key goals of our data analytics program is to improve our ability to help our students succeed. This presents a challenge for UMUC as an open institution that serves more than 84,000 students each year. Early on in the development of the program, we used data from our learning management system to help us identify students who were at risk of failing. The data pointed to one group in particular—those who had long gaps between the times they were logging into their classes. In response, we designed emails that would automatically be sent to the identified group with an encouraging message and a list of resources to help get them back on track. What we didn't realize at first was that many of the students who were receiving the emails were in the military (more than half of our students are active-duty personnel or dependents serving overseas) and who were deployed or out on training exercises. They were not in danger of failing, just unable to log in because of their schedules.

One of the members of our leadership team in student recruitment brought this point home when she said that just because you have the data and have identified your problem doesn't mean you know the solution that will address the problem or make it go away. It is at this point that it is vital to be able to call on analysts with the expertise to interpret the data from a different dimension, or with different attributes, that will help drill down further.

A key limitation also is the lack of expertise and infrastructure at an institution to build a comprehensive data analytics program. We built our program from the ground up, and as a result of its success in helping UMUC achieve operational and academic efficiencies and improvements, we made the decision to spin off our analytics unit into a new company that will offer these services for a fee to other institutions. Just as it continues to do for UMUC, the new company, HelioCampus, integrates data from an institution's existing source systems, normalizes the data—adjusting values so they can be compared on a common scale—and models the data in a central repository. Just as important as the technology, HelioCampus team members provide ongoing data analysis and storytelling services to institutional stakeholders to identify, support and expand analytics initiatives across all divisions of the institution.

TECH TOOLS AND RESOURCES

More Than an Afterthought: Management Systems and Non-Traditional Divisional Success

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EXECUTIVE DIRECTOR OF CONTINUING EDUCATION AND PROFESSIONAL LEARNING AT OISE, UNIVERSITY OF TORONTO

For divisions serving non-traditional students, competition is just a fact of life. Given the low barriers to exit for students, it's critical for these divisions to deliver a high-end experience at every stage of the student lifecycle—from the research stage to registration and enrollment to completion and beyond. Central to delivering a great experience is technology that often sits in the back of administrators' minds: the management system. The Ontario Institute of Studies in Education's (OISE) Continuing and Professional Learning (CPL) division recently invested in a new customer lifecycle management system to support the delivery of a high-end student experience and the management of their programs—especially important given their efforts to expand their target demographics beyond traditional teacher professional development. In this interview, Elisabeth Rees-Johnstone reflects on why OISE CPL decided to move on from its homegrown system and shares her thoughts on the impact their new system will have on both the student and staff experience.

The EvoLLLution (Evo): Why did OISE Continuing and Professional Learning decide it needed to invest in a new system?

Elisabeth Rees Johnstone (ERJ): I have been working in postsecondary continuing education for a little while, and I have experienced attempts to build customized IT solutions to support the continuing education business, which has been a very painful exercise.

When I first joined OISE and saw that our legacy systems were designed more for traditional postsecondary students than professionals. I knew we needed a solution that would ensure the security of our data and also ensure that our customer experience was aligned with the needs of continuing education professionals.

Evo: Can you elaborate on why a system built for the traditional student experience doesn't match what a CE student's needs?

ERJ: If you're exploring options to pursue an undergraduate degree or a graduate degree, the time and research you invest to inform your pathway choices can be significant. You'll also typically go through a lenghty and multi-stage admissions process, including a waiting period to learn whether or not your application has been successful.

On the other hand, non-traditional learners want to be able to self-serve, to shop a bit to determine what they're looking for and weigh-up options when deciding what they need. They want to know the system will remember their information. Offering an experience that's quick and easy is key, and that's a very different need than what students expect when applying to a formal undergraduate or graduate program.

Evo: What were some of the core issues with the homegrown system you inherited when you started?

ERJ: When I arrived here I was really concerned about the customer experience. We had three clunky legacy systems and an awful lot of paper-based administration, which meant that even trying to maintain some semblance of a quality customer experience was stressful for the team. Every task that looked automated to the learner was in fact extremely cumbersome and labor-intensive for staff. Then our IT partners told me our data was at risk, and if our legacy servers went down they might not be able to retrieve the data at all. That really was the last straw. Customer experience, staff experience, inefficiencies for workflow and critically, data security, were the core reasons for finding a new system.

Evo: What does it take to deliver a great staff experience? And how does technology play a role?

ERJ: We fundamentally believe we cannot deliver a great learner experience if we do not have a great staff experience, so that is critical to what we do.

When technology makes everyday tasks easier for staff, it helps to create a great staff experience, which in turn makes it easier to deliver a great learner experience. Nobody shows up in the morning wanting to do a terrible job, but when you're working across myriad systems, lacking easy access to critical information, or held-up shuffling paper files, it creates a negative staff experience. The right infrastructure allows folks to really shine and do what they do best, which is ultimately to serve and deliver a great experience to learners.

Evo: Ultimately, what are the central characteristics to a great customer experience for non-traditional students?

ERJ: Learner choice and enabling control through a self-service model is critical to delivering a great learner experience. It starts with the first engagement a prospective learner has with your web presence and how they engage with your content, through to how well their concerns are addressed when they call your office for help. Is the process easy and seamless? Is the learner confident they're going to get what they've paid for, and in the way they expect? Are we properly supporting them in whatever modality they've chosen, whether it's online, blended or face-to-face? At every touch-point we want to ensure that we're erring on the side of generosity.

Evo: What do you expect to be the key outcomes of moving to Destiny Solutions' customer lifecycle management software platform Destiny One?

ERJ: When basic, time-consuming administrative tasks are reduced, it creates capacity to brainstorm and get creative. For example, having control over our web interface allows for all sorts of creative thinking about how we can grow and better serve our audiences. I look forward to the days we can realize aspirations of providing learners the option to create their own certificates, and to better recognize and engage with our alumni in meaninful ways. We've faced limitations in the past because our systems wouldn't allow us to be nimble, and now with the help of Destiny One we have so many opportunities ahead of us.

We've also been working with Destiny Solutions to figure out how to ensure the seamless introduction of new technologies, both inside and outside of the classroom. We always ask stakeholders whether it was easy to engage with OISE, if they were able to access the information they needed when they needed it, and if we were responsive to their questions, particularly when something wasn't easy to find. Having a partner like Destiny Solutions that helps us take care of those things means we can focus on innovating in other areas.

This interview has been edited for length and clarity.

CUSTOMER SERVICE

Making Sense of the Numbers: Using Data to Support Students Across Their Lifecycle

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Businesses of all stripes—from online stores to banks to health service providers—have been leveraging Big Data and analytics in their decision-making and customer-facing processes for decades. Higher education institutions have only in the past few years begun to pick up on this trend, but given the challenges institutions are facing with budget limitations and competition, it's critical for colleges and universities to make data more central to their process. Getting to the point of actually leveraging this data, however, requires buy-in from leaders across the institution. In this interview, Michael Kabbaz shares his thoughts on the benefits Big Data brings to the table when it comes to supporting students at all stages of their lifecycle and reflects on the impact data visualizations can have in making this kind of information actionable.

The EvoLLLution (Evo): Why has Big Data become so popular in higher education circles today?

Michael Kabbaz (MK): The growth in the field of data analytics has led to great advancements across other disciplines and industries, and we have now found their applicability in higher education. It's coming at the same time as a serious questioning of the value of a higher education degree, which has intensified in recent years. This has led to increased expectations from the external market. There's pressure from the media—we're all accustomed to seeing the annual *New York Times* article of the student who is $100,000 in debt from a prestigious institution and can't find a job—funding bodies, and students themselves. In short, return on investment has become a driving factor that has really pressed institutions to be much more involved in the conversation about Big Data and analytics.

Enrollment management has really moved towards this concept of leveraging data from the entire student lifecycle to impact an institution. From admissions to graduations, from the types of students we recruit to how we enroll them and how we support them—everything we do can be improved with data.

Evo: What are a few of the most important benefits of Big Data that senior institutional administrators should know about?

MK: I think a lot of the fear that comes out of Big Data and predictive analytics is that it actually takes away the personal side, which is why many of us got into this work. But in fact it's the reverse. What senior administrators should understand is that data can be a powerful tool for better serving our students. The reality is certain students need more assistance and support than others. Data can help us sort through the students who most need our help so we can better target our time and our resources to maximize our impact on the student experience.

Data and predictive analytics can also be powerful tools for breaking down silos. For a long time higher education has been very decentralized—there's the bursar's office, financial aid, admissions and more—and when you start to leverage data points from each one, you can connect the dots and get a clearer picture of the whole student lifecycle. Data and predictive analytics can identify students who are having trouble paying their bills, track students who have grade drops in certain areas or who are missing courses they need to graduate.

You can't track 20,000 students at everything they do, but by better leveraging data analytics and predictive analytics you can intervene sooner. They help you to fully understand the student, allowing you to better support them.

Evo: On the flip-side, what are the limits of Big Data and analytics that senior leaders need to keep in mind?

MK: We're inundated by data more than we ever have been before, and some days it feels like too much data. But one of the things that I think is absolutely vital for higher education administrators is to make sure that, as you're looking at the data, you're also looking at the qualitative stories behind it. Having access to more data and more information than ever before doesn't negate the importance of the qualitative side. The qualitative side should inform how the data is used, what actions are taken and what policies are impacted.

Evo: How important are data visualizations and dashboards to being able to translate these high-level or complex ideas into something that's easily digestible?

MK: Data visualizations are very important. Most institutions have a lot of expertise terms of producing the data, but the real power comes from being able to analyze and discuss the impact of it. The visualization of data is just as important as the data itself because it makes it understandable and actionable.

Further, sharing analysis broadly is the transparency piece to this. As we democratize data, we put it in the hands of decision makers at all levels of the organization. Visualization and the ability to analyze and understand data at all levels is a critical part of this.

Evo: Is there anything you'd like to add about what senior leaders need to understand about the use and value of data to their operations?

MK: There are some institutional leaders that I would call skeptics, who fear that the data can actually harm the student. But I have learned that data is a companion to the knowledge and expertise of faculty and staff. For example, we're starting to collect LMS data for our online courses looking at how students engage with the platform and the assignments. We've found that engagement with the assignments connects to engagement with the class as a whole, and ultimately with the broader university. If the faculty member in the classroom knows how students are engaging with the material, isn't that a powerful tool to engage those students further?

The idea that I think we have to work on is getting people to understand that data really has the ability to enhance and it doesn't preclude the personal side of higher education.

This interview has been edited for length and clarity.

Chapter 4

Making the Supportive Environment a Reality

HIGHER ED AS A BUSINESS

How A Transformational CIO Can Help Your Institution Grow

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The future of higher education depends largely on innovation and transformation. Any college or university that is not able to innovate and reinvent itself will cease to exist. It's as simple as that. A more difficult task is how to create a culture of innovation and transformation not by serendipity, but by deliberate design.

So, how does the institution systemize innovation without killing it? The good news is there may be someone on your team who is already skilled in end-to-end innovation planning.

One of the leadership roles best poised to help institutions innovate is the CIO. The effective use of data and technology has been a major force in driving growth at highly successful institutions. Positive disruption in business and higher education has been driven largely by technology. To be successfully transformative, a CIO must change their primary focus from classic IT support to business analysis and strategy, taking a holistic view of the success of the institution. Transformational CIOs are helping to inspire and create the changes institutions need to survive in higher education by changing the way users perceive technology and its use in education. The nature of the CIO role has changed dramatically from the 1980's to today. Although there are some CIOs still working primarily in the classic mode of IT support, there are others who have stepped up to the leadership table by assisting the institution with a strategy for scaling and growth.

Skills the Transformational CIO Must Have to Enable Institutional Growth

CIO's must have the support of the college or university leadership team to act in a strategic capacity rather than a "keep the lights on" type of role. To muster this support, the CIO must be able to influence organizational culture by being a trusted leader who keeps promises. They must have mastered the classic infrastructure and support role of IT department responsibilities and have delegated some of this functional work to trusted IT employees, so that those basic needs of the institution are very successfully met. Only then can CIOs be freed up to become the business strategists that are needed in today's higher education institutions.

Transformational CIOs spend the preponderance of their energy on proactive, institution-wide strategies targeting success.

Transformational CIOs must also learn when to say "no" to projects that will drain precious energy away from the campus-wide strategic goals for growth. They must be prepared to eliminate practices that no longer serve the institution.

It is vital that they be skilled at partnering with other areas of the institution, finding allies within the organization, and breaking down silos where they find them. The allies and partners must see the CIO as a facilitator and not a giant roadblock to where they want to go. The CIO must communicate with all partners about technology in a way that is understandable and interesting to a non-technical audience. They must be able to clearly explain why what they are doing will lead to a successful outcome for all involved parties.

> To be successfully transformative, a CIO must change their primary focus from classic IT support to business analysis and strategy, taking a holistic view of the success of the institution.

The CIO must have a broad knowledge of the entire college or university at the process level. This involves talking to people in many areas and learning business processes. Having this knowledge will be extremely advantageous for creating strategies for scaling and growth. You can't change a process if you don't understand what the desired outcome is. Having this broad source of knowledge will allow the CIO to see where opportunities for improvement might be and IT's contribution to it.

The transformational CIO must take on the big data challenge. They must know how the college or university can best utilize and capitalize on the data available. Knowing how to capture and make effective use of data can be a powerful tool in your toolkit and can create valuable insights for the success and growth of the institution.

The transformational CIO must be prepared to redesign and reimagine the IT team—roles are changing quickly– there is less need for hardware experts more need for high level IT skilled workers who are able to work with the new integrated IT services. Legacy on premise IT service provision must change to meet new demands for going digital. The CIO must be able to attract and retain the right talent for the skillset needed, which can be very challenging given that some of these skills are in high demand.

Lastly the CIO must understand the rapidly changing landscape in higher education. There is a scarcity of resources at many institutions creating a need to find ways to become more efficient. That's where technology can come into play and improve and enhance processes.

Some CIOs Cannot Make the Leap to Transformation

How many CIOs are actually operating at this transformational level and how many are still classic IT support providers? The answer is many are still operating in the classic IT mode based on CIO survey data. IT departments are still bogged down in meeting basic technology needs, unable to be the advance guard to guide technological innovations to improve process and effectiveness.

If the CIO is unable to delegate the running of operations and infrastructure to trusted employees they're likely to miss the opportunity to participate in business strategy discussions as they will be overwhelmed in a mountain of details. They may be unable to delegate due to low staffing levels, lack of skilled staff to delegate tasks to, or an unwillingness to change on the part of the CIO.

Also, if CIO is not part of the leadership team it is highly unlikely that they will be able to garner the support to work at the strategic level beyond the walls of the IT department. The CIO must become known for business process thinking. If this type of thinking is not their area of expertise (or interest) they will have a difficult time making the transition to the leadership team. CIOs with a purely technical background may find it difficult or uncomfortable to move to the transformational CIO role. If they are not able to commit to cultivating the necessary skills for transformation they risk not being able to meet the needs and expectations of the institution in the future.

Ways Transformational CIOs Add Value to Their Institutions

There are a few key ways Transformational CIOs work to help their institutions evolve. They:

- Understand the value in the use of data and analytics to analyze student needs and higher educational market shifts.
- Scout for new technologies that can be used to improve the institution's services to students.
- Promote the reengineering and automation of business processes to free up time and human capital for strategic redirection, helping to reduce costs while still doing more.
- Use technology to monitor for continuous quality improvements. Almost anything done using technology can be measured. Take advantage of that data to make changes and improvements to your processes
- Create an idea management system to capture good ideas for further exploration as one part of an end-to-end innovation process.
- Help the institution become more nimble by automating and more customer-focused by freeing up staff time.
- Differentiate the college or university from competitors using innovative student success technologies and new modes of delivery, and by optimizing educational technology.
- Help to create an innovation culture to use information technology for a competitive advantage.
- Suggest new systems to respond to student preference and demand.

Conclusion

It is critically important to get all hands on deck during this period of great disruption in higher education. At some campuses the CIO is a largely untapped resource to help the institution grow.

The leadership teams along with the CIO need to spend time creating a strategy to confront the coming disruption in higher education. Some of the challenges faced will include declining enrollments and price deflation driven by changes in the higher education marketplace. Leaders will be required to identify new opportunities for growth and innovation using tools that involve technology and data analytics.

Consequently, the CIO needs to be a major player, proactive rather than reactive, as a full partner in the mission. The transformational CIO has the potential to be a driver for institutional scaling and growth through the use of innovation, making it one of the most exciting roles on campuses today.

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INFRASTRUCTURE

Defining “Needs” and Separating them from “Wants”: Central to Any Successful IT Project

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Recently a client came to me and asked for a new, very expensive laptop. They touted how light it was—only two and a half pounds! They talked up the fact that this laptop doubled as a tablet and would allow them to take really good notes during meetings. They then switched gears and started complaining about their current computer. It was an immovable desktop. It was old. It was slow.

I was surprised by this request, because this person did not travel often or attend many meetings. The features they were really praising would not do them much good in their day-to-day work. Sure, the new laptop would perform better than their current computer. However, it also cost four times as much.

After asking a few more questions to try to ascertain why they wanted the laptop and what prompted their request, I finally understood. The client had recently attended a big conference with many leaders and directors in their field of work. What did most of those important people bring to the conference? They brought their fancy laptops.

Technology is not just the features of a software package or the specifications of a piece of hardware. Technology is also the marketing jargon, the trends, the rumors, and the “look at what *they’re* using!” desires. Oftentimes, technology is a single need obscured by layers and layers of wants.

The primary challenge for many IT leaders then becomes how to define high-level needs and wants. In order for a project focused on identifying a new IT solution to be successful, the layers of wants must be peeled back to find the true business-driven needs that will add value to the organization.

This is especially important in a complex postsecondary environment. These educational institutions often face stricter budgetary limitations, additional information security and regulatory restrictions, and lower staffing levels. Ensuring that the core requirements are being addressed while additional financial resources are not being spent on items that are simply nice to have is crucial.

This begs the question, "Where should IT leaders begin on their journey of identifying and separating the needs from the wants?" Defining needs and wants, of course!

In order for a project focused on identifying a new IT solution to be successful, the layers of wants must be peeled back to find the true business-driven needs that will add value to the organization.

Needs are things that can be directly tied to a business goal or objective and are absolutely necessary for the solution to be successful. Needs define functionality that will add value to a business or fulfill a legal/regulatory mandate. Unaccounted for needs will lead to gaps in business processes that will eventually have to be filled by another solution.

Wants, on the other hand, are nice-to-have features that could ultimately be excluded. Wants can often be ideas that a user was sold on by someone else and did not develop organically from a business process. Wants are not necessarily bad things, but they are not completely necessary. They should not be the focus when looking for an IT solution.

The line between needs and wants can sometimes be blurry. In day-to-day language, it is all too easy to use the words interchangeably. However, bundling wants with needs together can have some serious negative consequences for a project.

First, wants can lead to feature creep. Feature creep occurs when the list of things a solution must do continues to grow larger and larger. At first, this may sound like a good thing—your IT solution can do more. In reality, however, this leads to a product that is bloated and difficult to use. Incorporating all kinds of wants into a product will often result in a cluttered and clunky user experience and performance issues. When a solution is expected to do everything, it is often hard to get it to do anything.

Second, wants inflate the cost of a project. By definition, wants are not needed. However, there is likely to be a direct correlation between the number of features of a solution and its price tag. This results in an organization paying to add features to a solution that are not justified by their business processes. It is easy to see how the cost of the wants can quickly outgrow the cost of the needs.

Third, wants tend to be more prescriptive while needs are descriptive. Put simply, needs describe the features an IT solution must have. Wants, on the other hand, prescribe the solution. People often have an existing solution in mind when thinking about what they want, and it is difficult to separate the final product from the individual components that make it desirable. This can severely limit the options that are explored and cause a project to be prematurely guided in a specific direction. Advertisements, buzzwords, and the desire to not feel like you're behind the times all contribute to this phenomenon.

One example of the prescriptive nature of wants can be seen when looking at Software as a Service (SaaS) solutions. The increased desire to have everything live in "the cloud" has created an enormous industry of software that organizations pay for monthly but never truly own. Everyone uses at least one SaaS tool during the course of their day-to-day work and many companies market their SaaS solutions as more innovative. And while there are many great SaaS tools, deciding you want a cloud solution before you even start gathering your project requirements can cause you to overlook a great on-premises option and spend much more money over the life of the solution than you need to.

The issues associated with confusing wants with needs can be avoided by creating a clear distinction between the two. As this article has done, IT leaders should start by clearly defining both terms to make sure everyone is on the same page. Remember, these words mean different things in the context of project management than they do in regular conversation.

Additionally, IT leaders should not be afraid to question people when they try to pass something off as a need. Why is that a need? What business process does it support? Why does that business process need to exist? Whom does it benefit?

Still, getting to the finish line with two clear and separate lists containing the needs and wants will not be easy. For starters, the requirements for a solution may be different depending on which unit or department a staff person works in. Ideally, all business processes are standardized across an entire organization. Rarely do we live in an ideal world.

With time, processes evolve differently in different units. New employees affect change in some areas of the organization, causing them to alter how they do things. Then, when everyone is brought back together to identify a single solution, the work now differs enough that requirements for one group are extraneous features for another.

Another challenge is getting people to approach the requirement gathering with an open mind. As previously mentioned, many people start the process with a solution already identified. This creates the risk of finding needs to match your solution instead of the other way around. The entire brainstorming process is bypassed and not all requirements end up being driven by business needs.

There is a definite need for guidance from IT leaders to successfully identify a solution that is appropriate for the organization. However, a balance must be achieved to ensure that a collaborative environment is maintained. IT leaders should be very direct in setting the goals and expected outputs, the limitations (financial, regulatory, etc.), and the timeline. They should not discourage discussion, stop people from presenting ideas that may not eventually pan out, or let their own preferences for a solution get in the way of the group coming to a consensus.

At times, the project may get stuck as participants in the requirement-gathering process find themselves talking in circles or unsure of how to proceed. This is where the IT leader can step in as a consultant and help move things along. But, they must not be too heavy-handed in their involvement to avoid making participants feel uncomfortable offering up their own views. The easiest way to not capture all the needs is to create an environment where people don’t want to participate.

Successfully guiding a project focused on identifying a new IT solution is no small feat. One of the most difficult aspects is capturing the requirements for the solution and separating them from the nice-to-have items. Done correctly, however, this step greatly increases the chances that a project is completed on time, under budget, and with a solution that will add value to the organization.

TECH TOOLS AND RESOURCES

Supporting Organizational Effectiveness with an Operational Health Check

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A lot can change in nine years, even though it might not seem so long ago. In 2008, *No Country for Old Men* won the Oscar for Best Picture. Beijing was hosting the Olympics. The iPhone was only a year old and we were still two years away from learning about the iPad.

2008 was also when University of Calgary Continuing Education (UCCE) became clients of Destiny Solutions, implementing the Destiny One system to manage our non-credit offerings. Eight years later, in 2016, UCCE engaged with Destiny Solutions in an Operational Health Check (OHC) of our Destiny One implementation. After all, with almost a decade of experience in the Destiny One system, we believed we were overdue for a second opinion on how we were using the product.

Though eight years might not seem like a long time, it is easy to become stagnant in your business processes, and although we knew we were not leveraging the full functionality of Destiny One, that awareness did not push us out of our comfort zone. When it comes to leveraging the full functionality, again, eight years is a very long time. Consider the functionality of the first iPhone compared to what's available now.

We had to bring someone into our environment with a broader frame of reference, to show us what we could be doing differently, to help us understand how the Destiny One system had changed, and to present us with an unbiased view of our work.

The OHC consisted of two parts. We first conducted a number of internal meetings to get our ducks in a row, and then had a Destiny implementation consultant come onsite to run a series of meetings and sessions to better understand our processes.

Part One of of the OHC: Internal Meetings

Part one consisted of a number of internal meetings with staff who regularly use the core modules of Destiny One (i.e., Curriculum Manager, Enrolment Manger, Marketing, etc.). Destiny provided us with some questions to ask our staff about how they use the system and asked us to document the responses. Essentially, we were identifying the pain-points that staff were experiencing as they worked with the product.

From these preliminary sessions, we discovered that that although we were using the same registration system, we were not executing common tasks in the same way, or with the same knowledge and information. This inconsistency is not a small or inconsequential matter, and it's not just a simple issue of potential inefficiencies. The risks of this kind of inconsistency include the potential for data integrity issues, misguided work or misplaced priorities.

On a positive note, these sessions provided staff with opportunity to dialogue about how they use the system, sharing knowledge and best practices, learning from each other and teaching each other. I received feedback from staff requesting Destiny One user-group meetings at least once a year so staff have opportunity to come together to discuss and share how they are using the system. In the future, we will host these town-hall sessions with staff prior to every Destiny One version release, which happen approximately three times a year, so we can review new features, upgrades and fixes, and have open discussions that provide learning opportunities.

Part Two of of the OHC: The On-Site Visit

Part two of the OHC was the site visit from a Destiny implementation consultant (IC). Over the course of two days, the IC reviewed the results of the preliminary sessions, clarifying and addressing the questions and concerns of staff, and demonstrating product functionality that we did not know existed. From the preliminary sessions and the OHC visit, over 130 questions and use cases were reviewed. Items were categorized based on the following areas, with many issues having components that will require more than a single resolution strategy:

- Training items: 86 issues had at least some training/ out-of-box component
- Configuration items: 13 issues resolved by enabling existing Destiny One functionality
- Product Improvements: 19 considerations for the Destiny One product roadmap
- Gaps: 43 issues had at least some gap component, likely requiring a change request

Following the OHC, we learned about new developments and increased functionality within the Destiny product. We discovered we are not as consistent or as efficient as we'd like to think we are, and there were several things that our Destiny representative explained and demonstrated over the two days that the staff wished they'd known all along.

Looking to the Future: After the OHC and Beyond

For the final stage of the OHC, Destiny compiled a report providing recommendations such as system configurations we can enable ourselves or that Destiny can help us to implement inexpensively. They also offered customizations that we can consider and potentially partner with other clients on through the GROW community, enabling increased efficiencies for all.

The OHC is providing a plan and a path toward easing the administrative work of our staff so that they can provide enhanced and personalized customer service. It will also make a big difference in helping us to maintain data integrity in the system, which will save us money over time because it will take less time to produce accurate reports. These improvements may seem small and incremental, but they all add up. If the system is used in a consistent manner across different program areas, the result is ability to make better management and business decisions more quickly.

OPERATIONS AND EFFICIENCY

Building Support for Change: Eight Strategies to Achieve Consensus

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A former colleague use to say, "Get the inside on side before you go outside." This is not always as easy as it sounds. When you are dealing with diverse stakeholders and differing perspectives, achieving consensus around a significant change can be challenging. There are, however, a few strategies that can be utilised to increase the likelihood of implementing a successful change.

Variation will exist—depending on the organizational culture, the nature of the decision, and the significance of the decision or change to the organization—but the following strategies are useful guidelines to consider when embarking on a new change or decision:

1. Agree on your end goal or at the very least agree on the problem you are trying to solve

In introducing any change, you need to be clear at the outset about what you are hoping to achieve. If there are differences of opinion at this stage, there will undoubtedly be problems down the road. Even if there isn't complete agreement about the ideal future state, at least agree on the problem you are trying to solve or what you are trying to improve.

2. Define success

It is helpful to get some agreement at the beginning of a change about what success might look like—will a service be improved, will quality be enhanced, will your staff be more fulfilled, will your learners be served better, cheaper, faster? These are important factors to discuss early in the process.

3. Identify who needs to be involved in making the decision

Not everyone can have a say in every decision or every change. However, key constituencies need to have the opportunity for input. It is also important to be clear about what you expect from those that participate in the process. Do participants have a vote in the final decision or are they there for input? Does everyone involved in the process have an equal voice or are some "more equal than others"? Manage the expectations!

4. A clear communication strategy needs to be established

This is particularly important for those that will not be closely involved in the decision. A clear roadmap should be established for who will provide input, who will provide updates and when. The more complex the organization or the decision, the greater the need for clear articulation of what you are doing or proposing to do, who will be involved, what your timeframes are going to be and when you will report back.

5. Identify the criteria upon which you are making your decision

As you consider options before you, it will make the final decision easier if you have established the factors you will use to select a final option. Are there factors that are deal breakers? Others that are nice to have but not critical? Will time, cost, quality or other elements factor in to the criteria to make a final decision? Moreover, in the group of decision-makers, how will you make your collective determination? Do you wish to achieve consensus? Does this mean unanimity? Will a vote decide it or will "the boss" have the last word? There can be a place for each depending on your organizational culture and the decision or change you are trying to implement.

6. Launch a trial balloon

Every decision or change will have to be implemented, often by people who were not part of the decision. Where it is feasible, support for a decision can be achieved by "testing" a proposed approach. "If we were to do this… what would work, what might not, what would we have to do to ensure success?" This step can gather commitment from those not directly involved in the process and can raise potential red flags before implementation.

7. Implementation is a whole new game

Even when you think the decision is made, be prepared to revisit it. Those who were involved in the decision but who don't like where you finally landed can make implementation difficult. Those who were not part of the decision may dig in their heels as implementation occurs – sometimes because they don't agree with you but sometimes because they don't understand where you are going. Once again communication becomes a critical component and just because you communicated once (or twice or three times) doesn't mean you won't have to explain further.

8. What have you learned?

When significant change is introduced there will be lessons learned. Take a moment after the dust has settled to revisit what worked, what didn't and what you should do differently next time around. A post-mortem on any change or decision provides the basis for improvement going forward. After all, none of us wants to repeat our shortcomings.

Lead—Don't Be Led By—The Change

We work in busy organizations. They are continuously evolving and changing and we are called upon to introduce change, respond to change or make decisions to effectively function in this environment. The success of any change implementation will depend on your ability to harness the support of others within the organization.

By considering some of the foregoing factors, you better position your organization to successfully lead the change rather than have the change dictate the outcome.

TECH TOOLS AND RESOURCES

Preparation, Expectation Management and Commitment Central to Driving Major Projects Home

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In the world of higher education, few projects require as much planning, coordination and effort as a new system implementation. However, few projects can have the same impact on institutional success and growth, making these efforts well worth the time. At the University of Delaware Division of Professional and Continuing Studies, they recently implemented the Destiny One Customer Lifecycle Management software platform as the hub of their back-end system. In this interview, Shaun Sutherell and Steve Kendus reflect on what it took to get the project live and share their insights into the role and responsibilities project managers have in guiding such an effort.

The EvoLLLution (Evo): What were the steps you and your colleagues had to take between realizing a need for a better back-end system and getting the Destiny One system implemented?

Shaun Sutherell (SS): This was years in the making. Our associate vice provost, Dr. Jim Broomall, challenged our leadership team several years ago to find a long-term back-end solution for Professional and Continuing Studies. It took a lot of research and documenting to get there—just determining what our specific needs would be with a new system was a monumental task. From RFP to signed contract to go-live really was years in the making. We knew we needed a new solution years ago, but finding it and getting it implemented was a considered process.

Evo: How flexible were you in terms of shaping your business processes to the way the software worked, and to making sure the software could be shaped to your business processes?

Steve Kendus (SK): When the discussions were ongoing about choosing and implementing Destiny One, multiple folks had a seat at the table, including representatives from the program management, IT, marketing and executive teams. This way, we were making sure that all of our bases were covered and that we were finding the right solution to fit our organization.

We did ultimately have to adapt some of our processes to fit the system. Originally, we were hoping there would be some capacity to accommodate some of our processes, but in the end we just changed some of our processes to fit the system.

From an education perspective, the Destiny One implementation required us to teach people how to use the system and required us to introduce them to new ways of doing business. It wasn't extremely difficult to do, but it took some time. We're still going through those transitions. I think we're in a very good place, and people are comfortable with where we are now.

Evo: What were the most significant roadblocks you faced in launching Destiny One and how did you overcome them?

SK: The most significant roadblocks we faced revolved around training. Folks came in blind to Destiny One and, in those early stages, we really didn't know what we didn't know. We did have a week or so of training in November 2016, and then we began the full-fledged implementation after that and went live in the last week of February 2017. Since the initial week of training was several months earlier, a lot of the information that was taught was forgotten or lost in the shuffle of all the things being learned. Ideally we would have liked an additional week of training either at go-live or post go-live.

SS: I would reiterate that as the business analyst over this project I felt like I was winging it for a while, but really the challenge was overcoming that and becoming comfortable. This is a monumental task, especially when the buy-in around this new system is so important to the unit.

When leaders like Steve and I are still learning our way through the system as we go, it was a challenge at times to provide our teams the information they needed. We really did have to change, adapt and work harder to realize the long-term benefits. Of course, it's important to note that—because the old system was so customized to our every little need—getting an out-of-the-box product with little customization was going to be challenging to work through almost no matter what.

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Evo: What were some of the areas that you had to navigate to make sure that everyone was one the same page when it came to getting the product implemented and making it a part of everyone's workflow?

SS: Having a flexible team is key here because if you're too rigid about this we never would have made it to go-live on time. Like Steve said, we didn't know what we didn't know so I had to effectively figure out ways of quickly coming to answers to some of the questions our team had.

Destiny One's help section was always up on my screen, and the Zendesk application used by the Destiny Solutions support team was also essential for me to properly and effectively communicate a question so that I could get a response right away.

With a system this big, it's important to be really specific about what you're trying to find out so that the Destiny team understands where you're coming from, what your process is, and how you're trying to fit that into the Destiny model.

Really, getting everybody else up to speed was a matter of me being able to effectively leverage those tools so I could get the answers that got me up to speed. Then I could instruct my own team.

SK: Shaun mentioned the word “leverage” and I think it’s important to point out that we also had to leverage our team members to make this implementation happen.

We had no true implementation team—either full time or even part time. We all had to do our daily jobs as well as implement Destiny One. This is simply one of the realities of working in a smaller division. So we all had to come together and figure out the best way to maximize our time, which truly meant working additional hours every day (including on the weekends) to make sure that everything was buttoned up for go-live.

Shaun and I made a pact early on that, no matter what, we would not let the project fail and we would meet our implementation deadline. Lo and behold, we did it and, because of the amount of work that went into the implementation, we made the launch a big event within PCS. We reached out to the folks at Destiny and they sent us promotional items—mobile phone wallets, some different signage, mousepads and other things. We also built our own signage to mark the day of the go-live, which we called D-Day (Destiny Day).

We sent emails out, we had a countdown, and we made sure everyone felt proud of their efforts in helping get Destiny implemented. But more than just the work of getting the system live, we also wanted people to understand and to have high expectations for this system, so when it finally launched people were excited to get in the system and start using it.

Evo: What advice do you have for other leaders looking to implement a major back-end system like Destiny One?

SS: My advice is really that, before even considering vendors and specific products, it’s critical to do a thorough needs analysis. You need to know what your functions and processes are, and structurally prepare for this intensive commitment.

For me as the business analyst of the project I believe it was estimated that it would be 30 hours of my week leading up to go-live. Well in reality it was more than 40 and I still had my regular job. Bringing on a major system is a real commitment and you need champions to lead the charge.

My advice is for other schools to be prepared for what it takes to get any new system off the ground. Also, know what upgrades or customizations you’ll need to consider up front. Really knowing what the system can offer you and how you’re going to need to change is really essential to a successful implementation and launch.

This interview has been edited for length and clarity.