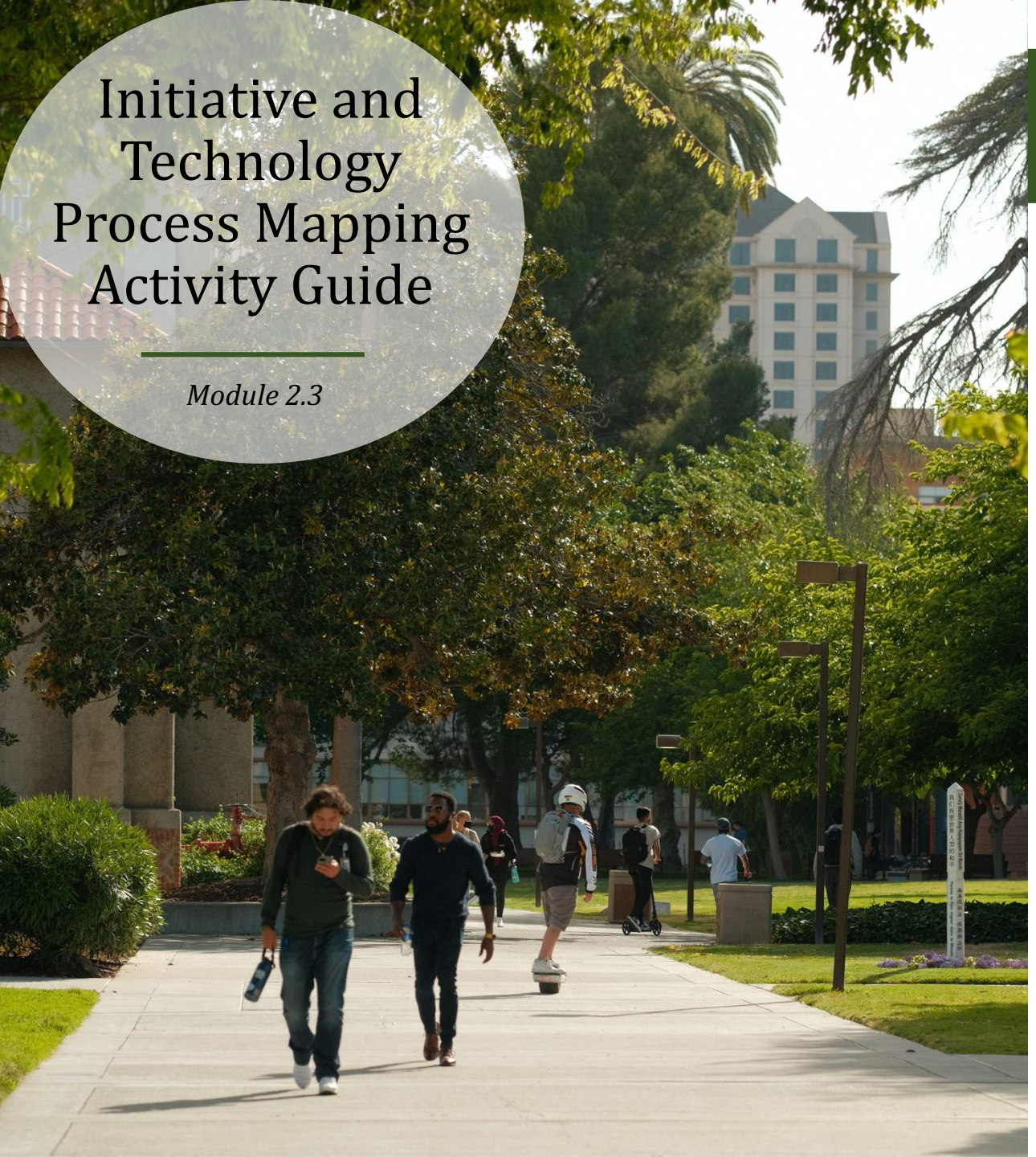


Initiative and Technology Process Mapping Activity Guide

Module 2.3

Module 2.3: Activity Guide

Contents

COMPLETE COLLEGE AMERICA The Ada Center ADVISING SUCCESS NETWORK

Creating a Student Success Technology & Process Map

An Exercise to Tackle Challenges and Opportunities with Student Information Management and Flow

Use Cases for this Exercise

- Your institution wants to ensure a new tool will address clearly defined needs and fits with other college investments.
- Your institution wants to explore gaps and challenges within current systems and business processes to ensure that faculty, and staff, have access to the right information at the right time.
- Your institution has a number of different software tools in your inventory and wants to pinpoint duplicative processes or tools before investing in a new solution.

Contents

Ideal Exercise Participants

To create and problem-solve around a comprehensive technology map, the ideal working group involves senior representatives from academic affairs, student services, IT, enrollment, and IR. It's also helpful to include frontline perspectives from staff (especially advising and key student-facing offices), faculty, and students. Many colleges opt to leverage an existing committee, such as a Guided Pathways working group or Technology Steering Committee, to form the foundation of this team.

Getting Started

To prepare for this exercise, we suggest:

- Reading Module 2.1: How Does My College Create a Student Success Plan?
- Participants agree on a 2-3 hour time slot to meet as a group to work through the exercises and survey together;
- Participants elect one Recorder to be responsible for compiling a master packet (including all maps, master technology map, and survey) to submit on behalf of the team;
- Participants print out this packet to write/draw on during the group session.

Exercise Instructions Part 1: Creating Your Technology and Process Map Foundation

To help your institution pinpoint challenges and opportunities associated with student success technology, it's helpful to create a comprehensive map of how key information is stored and flows across your college. To create that map, this booklet will guide you through a multi-step process that begins by taking stock of current college goals, associated activities, and information management approaches. In the second part of this exercise, you'll be guided through an analysis and problem-solving approach for those current activities. Throughout the booklet you'll find examples of how other colleges have approached each stage of the exercise. The entire booklet can be completed in a 2-3 hour working session; however, many colleges find they want to revisit the exercises with different audiences and in different venues.

(1) **Determine Your Big Goals (Focus Areas) and Discrete Initiatives (Projects):** As a first step, you will need to reflect on your institution's current strategic plan as it relates to student success and equity (pages 4-5). What are the high-level goals that the institution would like to pursue in the next 2-3 years? Next, consider: What discrete activities, including process changes, new initiatives, or other activities are being leveraged to achieve each high-level goal? List these under each high-level goal area. It may be helpful to refer to any existing strategic plans and theories of change to complete this chart on page 4 of this packet. Try and prioritize the most critical 10-15 discrete initiatives total.

(2) **Initiative Sketching:** On pages 6-7 of this module you'll find six pillars that correspond to critical student success activities for the college. In the white space below the six pillars, work with your team to map the discrete initiatives you listed on page 4 to these pillars. Draw a square around each initiative. If needed, you may allow the initiative to span more than one pillar.

(3) **Technology Sketching:** On pages 8-9 you'll find another page with six pillars and blank space beneath each pillar. Begin to list the software that manages the information associated with the initiatives within each pillar. Try and focus on the major technology systems rather than creating an exhaustive list. Draw a square around each technology that you've listed. Definitions of the six pillars are listed below.

Engage and Prepare Prospective Students
Managing the admissions and matriculation work flow, through student-facing and staff-facing activities and resources

Clarify the Path to Student End Goals
Articulating the courses and activities students should take and when in order to meet transfer and labor market goals

Help Students Choose and Get on a Path
Providing students with accurate and personalized information and guidance to help them select and enter an academic program

Help Students Stay on their Path
Ensuring that students get the information, support, and services they need when they need them

Support Student Learning
Helping students and faculty supplement and target traditional instruction to improve learning outcomes

Continually Improve the Student Experience
Investigating patterns of student enrollment, engagement, and progress to pinpoint areas in need of refinement

Strategic Initiative Alignment: Example

Strategic Goals Mapped to College's Specific Priorities

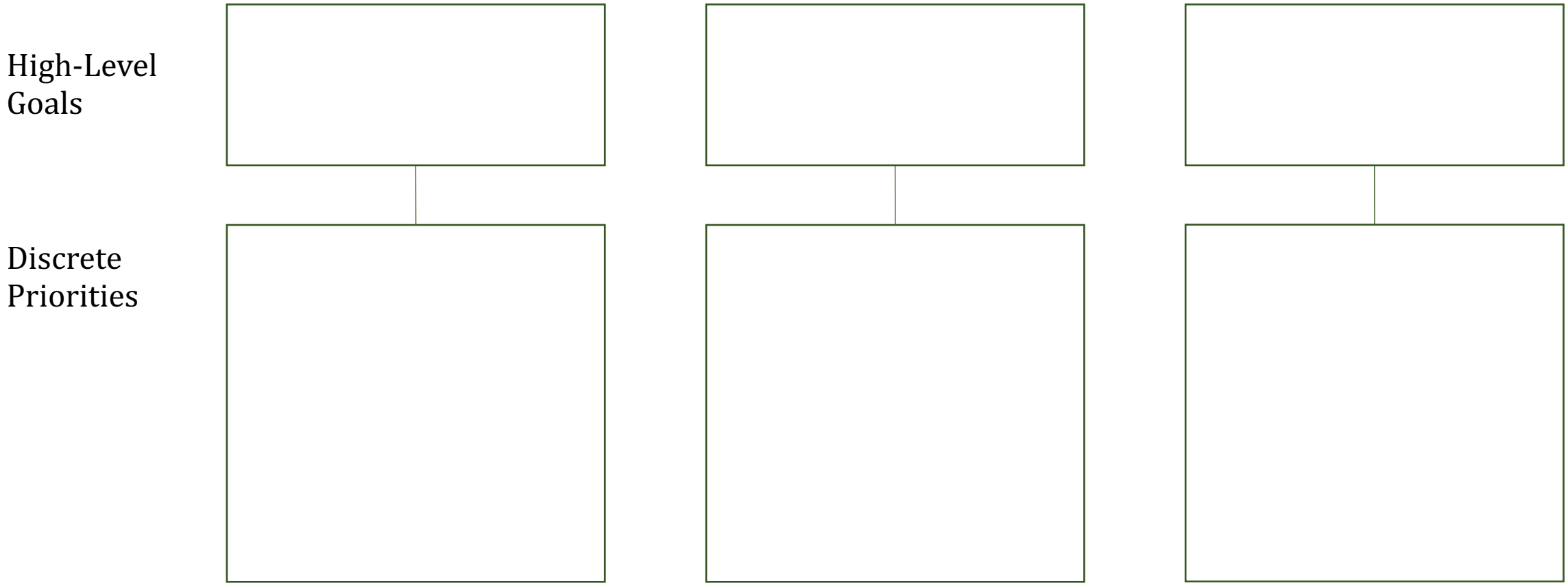
In the example below, Anywhere College has identified three major goals that the institution plans to prioritize over the next 2-3 years. Note that these are more specific than "retention" or "completion," but remain fairly high-level. Beneath each of these goals, Anywhere College has listed the specific action-items or initiatives that their teams are pursuing to attain each of the listed big goals. These discrete priorities may involve one or more departments/units, but each represent distinct projects that are aligned with student success and equity goals and outcomes.

High-Level Goals *(Sample)*	 **Reduce Barriers to Application & Enrollment**	 **Streamline Student Communications**	 **Strengthen Analytics to Support Retention**
Discrete Priorities	• Monthly visits with feeder high schools • Assign every new student an onboarding advisor within their area of interest • Finalize academic program maps • Establish transfer student enrollment specialist • Update major-specific transfer agreements with top feeders	• Develop framework for success team model; determine key roles and responsibilities for cohort management • Creating an early alert response framework; just hired alert manager	• Set analytics vision and priorities • Faculty review of course and student outcomes data, focusing on how altering course structure can help eliminate inequitable outcomes

Strategic Initiative Alignment: Worksheet

High Level Goals and Discrete Priorities

List three of your institution's high-level goals/initiatives for student success. We advise focusing on the 2-3 most critical goals, but you may choose to focus on fewer or add 1-2 more. However, note that adding too many focus areas may strain prioritization efforts later on as your team grapples with matching to-do lists with resource constraints. Next, list 3-5 discrete priorities (e.g., new policies, process updates, role additions/changes, targeted initiatives) that your institution is undertaking to support each of these big goals (~10 – 15 total). It may be helpful to refer to any existing strategic plans and theories of change to complete this chart.



Initiative Sketching: Example

In the white space below, work with your team to map your list of discrete priorities across each pillar of the student journey. For example, Anywhere College listed "Conduct monthly visits to feeder high schools" as one of its discrete priorities and have therefore slotted it under "Engage and Prepare Prospective Students." Draw a square around each initiative. If an initiative spans more than one pillar of the student journey, feel free to expand its box accordingly. For example, Anywhere College is adopting a centralized success team strategy, an advising and support model that leverages cross-divisional teams of individuals to collaboratively engage in cohort management for groups of students.[1] Given the breadth of this initiative, Anywhere College has drawn the box for "Develop framework for success team model…" across multiple pillars.

Engage and Prepare Prospective Students

- Monthly visits to feeder high schools to help students plan career and education goals

Clarify the Path to Student End Goals

- Updated major-specific transfer agreements with top feeders
- Finalize academic program maps

Help Students Choose and Get on a Path

- Assign every student an advisor within their area of interest
- Establish transfer student enrollment specialist

Help Students Stay on their Path

- Creating an early alert response framework; just hired alert manager

Support Student Learning

- Faculty review of course and student outcomes data, focusing on how altering course structure can help eliminate inequitable outcomes

Continually Improve the Student Experience

- Set analytics vision and priorities (e.g., define KPIs for each department/unit, decide on data sources, frequency, display, etc.)

- Develop framework for success team model; determine key roles and responsibilities for cohort management

Note: The content on this slide is an illustrative example from a typical college rather than a model for what your college should look like

[1] *Success team definition courtesy of Karp, Melinda M. & Lyons, Suzanne M. (2022). Student Success Teams: An Implementation Guide for Community Colleges. Phase Two Advisory: Denver, CO.*

Initiative Sketching: Worksheet

In the white space below, work with your team to map your discrete initiatives across each pillar. For example, under 'Clarify the Path to Student End Goals' you might list "Ensure all students have a semester-by-semester academic plan'. Draw a square around each initiative. You may choose to first draft this sketch with your team by hand or on a white board, perhaps revisiting your initial High-Level Goals and Discrete Priorities Template as you go. Then, copy over your finalized sketch to this template when it is finalized.

Engage and Prepare Prospective Students

Clarify the Path to Student End Goals

Help Students Choose and Get on a Path

Help Students Stay on their Path

Support Student Learning

Continually Improve the Student Experience

Technology Sketching: Example

Next, teams list the **major** technologies associated with each pillar, keeping in mind the initiatives from the previous exercise. Note: The content on this slide is an illustrative example from a typical college rather than a model for what your college should look like, but participants should leverage this example to get a sense for the types of major technologies you may want to include in your technology sketch on p. 9.

Engage and Prepare Prospective Students

- Microsoft *Excel, Word, Outlook for Mail Merge*

Clarify the Path to Student End Goals

- DegreeWorks *Audit and Degree Data*

Help Students Choose and Get on a Path

- Website PDFs *Academic Planning*
- Handshake *Career Planning*

Help Students Stay on their Path

- EAB - Starfish *Early Alert*
- Modo Labs – *Student Mobile App*
- Tutor Trac *Tutoring Workflow and Scheduling*
- E2E Advising *Advisor Workflow and Scheduling*

Support Student Learning

- Blackboard – *LMS and Analytics*
- Pearson - *MyMathLab*

Continually Improve the Student Experience

- iDashboards *College KPIs*

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Technology Sketching: Worksheet

Now work with your team to articulate the major technologies associated with each pillar, keeping in mind the initiatives from the previous exercise. Draw a square around each technology. Please note that you do not need to list every technology utilized on campus. Instead, focus on those that seem the most significant within each pillar.

Engage and Prepare Prospective Students

Clarify the Path to Student End Goals

Help Students Choose and Get on a Path

Help Students Stay on their Path

Student Affairs

Help Students Stay on their Path

Academic Affairs

Continually Improve the Student Experience

Initial Reflection: Do you notice any gaps between the key initiatives and major student success technologies?

Exercise Instructions Part 2: Putting it Together – Master Technology & Process Map Challenges

After completing your college's initiative and technology sketch, it becomes much easier to prioritize challenges and opportunities with student success technology. In this part of the exercise, we'll guide you through an analysis of your college's technology map, surfacing areas that could benefit from attention. Finally, we'll suggest a structure for addressing some of the most urgent needs surfaced in this exercise. It's advised that you complete this portion of the exercise with extra sheets of paper for brainstorming. The larger the paper, the better!

(1) Look at Your Technology Map and Your Initiative Map Side By Side: Compare your initiative map with your technology map. Consider: To what extent does your current technology ecosystem support the processes and activities integral to achieving your high-level goals? Share out your initial impressions with your team.

(2) Circle Challenges with Technology Gaps and Duplication: Next, we will pinpoint specific challenges. Ask: Are there major initiatives *with* significant information management needs that are occurring *without* technology system support? On your technology map, write out those initiatives that struggle due to lack of proper information management. Place them under the appropriate pillar on your Technology Map and circle them. Conversely, are there major initiatives in which multiple tools are being used and it's unclear which technology system manages the activity (out of several)? Circle those technologies with yet-to-be-defined boundaries and capabilities.

(3) Draw Challenges with Information Flow/Integration: Now, think about how information flows across the college, from system to system. On your technology map, draw solid line arrows to connect major technologies that have a functioning information flow. This flow could be human-based (e.g., registrar enters data) or automated (technical integration). Draw a dotted-line arrow between technology systems that either (1) don't connect, but would be helpful to connect, or (2) do connect, but the connection is not robust or reliable enough (e.g., susceptible to frequent human error, delays, or missing information).

(4) Recreating Completed Technology Map: It's likely your individual worksheets look like a kindergarten art project gone wrong! It's now time to redraw your completed master technology map, identifying challenge areas through circles, dotted lines, and notes to your team. Ideally this is a document that you can save and revisit over time.

Master Technology & Process Map: Example

The Ada Center

On your Technology Map, write out initiatives that struggle due to lack of proper information management and circle them. Also circle those technologies with yet-to-be-defined boundaries and capabilities. If you have time, begin to think about how information flows across systems. Draw a dotted-line arrow between technology systems that don't connect (or don't connect reliably enough) but would be helpful to connect and a solid line arrow for key systems that connect reasonably well.

Engage and Prepare Prospective Students

Clarify the Path to Student End Goals

Help Students Choose and Get on a Path

Help Students Stay on their Path

Support Student Learning

Continually Improve the Student Experience

Microsoft
Excel, Word, Outlook for Mail Merge

Big gap!

Pen and Paper Data Collection on Prospects or Individual Excel or Word docs! Very decentralized!

Banner
Audit and Degree Data

Hobsons
Student Planning

Must manually input and update degree plans; not very accurate

CollegeSource - *Transferology*

Handshake
Career Exploration

Need to transfer prospective student data to enrolled student case management system

EAB - Starfish
Early Alert

Modo Labs – *Student Mobile App*

Tutor Trac
Tutoring Workflow and Scheduling

We aren't using EAB to its fullest capacity – need to define which activities should be done here; probably duplicative tools

Blackboard – LMS and Analytics

Pearson - MyMathLab

iDashboards
College KPIs

New - working to pull-in and clean needed data

Master Technology & Process Map: Worksheet

The Ada Center

On your technology map, write out initiatives that struggle due to lack of proper information management and circle them. Also circle those technologies with yet-to-be-defined boundaries and capabilities. Think about how information flows across systems. Draw a dotted-line arrow between technology systems that don't connect but would be helpful to connect and a solid line arrow for key systems that connect reasonably well. **This page can serve as your master technology map (one per team).** Alternatively, if you need more room, you may choose to compose your master technology map in a separate document or on a poster paper.

Engage and Prepare Prospective Students

Clarify the Path to Student End Goals

Help Students Choose and Get on a Path

Help Students Stay on their Path

Support Student Learning

Continually Improve the Student Experience

Reflection

The Ada Center

By mapping the challenges and opportunities with student success technology, it's likely you've identified multiple technology-related areas you'd like to tackle as well as some additional process-related questions or action-items. Take a moment with your team now to reflect on some of these ideas.

Discuss:

(1) Given the challenges and gaps you have surfaced through the mapping exercise, what technology needs feel the most urgent/important? List these.

(2) What open questions related to technology tools, technology management, or process/initiatives arose for your team during this activity?

Next Steps

This module is meant to take you step-by-step through a series of activities and reflections that will allow you to gradually fill out your high-level student success technology plan. Through this exercise, you have defined some big goals and discrete priorities. And, you have started to identify potential priority areas for your student success technology endeavors.

The next section is Module 2.4: Post-Mapping Reflection and Prioritization Guide, which will provide guidance around how to maximize limited resources through disciplined project selection and alignment with your central student success and equity goals and initiatives.

- [x] *Read* Module 2.1 How Does My College Create a Student Success Technology Plan?
  ⏳ <1 hour
- [x] *Read and Plan* Module 2.2 Student Success Technology Planning Team
  ⏳ 1– 2 hours
- [x] *Complete* Module 2.3 Initiative and Technology Process Mapping Activity Guide
  ⏳ 3– 4 hours
- [ ] *Read and Reflect* Module 2.4 Post-Mapping Reflection and Prioritization Guide
  ⏳ 3– 4 hours

About This Series

This five-part instructional series on Student Success Technology is designed for minority serving institutions (MSIs) and their friends. Taken together, these instructional resources aim to provide practitioners with the tools to establish and maintain a technology ecosystem that effectively supports the institution's broader student success and equity goals. The exercises and resources within these modules are also widely applicable across the higher education field.

This resource was compiled with generous funding from the Bill & Melinda Gates Foundation and was authored by The Ada Center based on six years of insight from The Ada Center's work with hundreds of MSIs and access-focused institutions. The curriculum would not be possible without the thought partnership and support from Complete College America and the Advising Success Network.

For additional curriculum modules, please visit:
www.completecollege.org/navigating-student-success-technology

For questions about this resource, or to explore additional higher education technology research and tools, please visit www.theadacenter.org/resources.