Post-Mapping Reflection and Prioritization Guide

Module 2.4

Contents

This resource will be most useful for technology project managers, student success initiative leaders, and/or steering committees engaged in student success technology strategy

COMPLETE COLLEGE AMERICA

The Ada Center

ADVISING SUCCESS NETWORK

Preparing for Prioritization

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. In this section, we'll get these ideas on paper.

Most colleges will have more ideas than they can feasibly tackle. And that's okay! In the next section, we will work on exploring how to realistically assess which technology projects are the most critical and aligned to institution goals so that your team may begin to prioritize amongst them.

What You'll Need

(1) Strategic Initiative Alignment: This worksheet should contain your institution's high-level goals mapped to specific discrete priorities that you plan to pursue to achieve these goals. (Module 2.3)
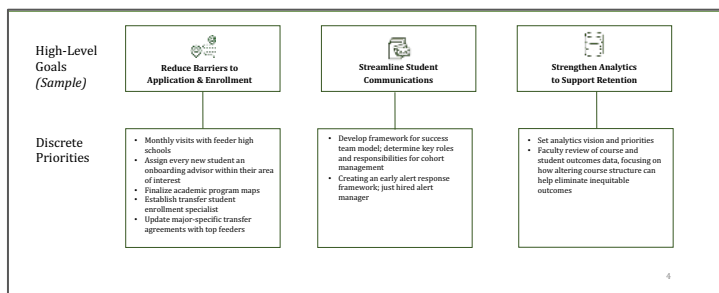
(1) Master Technology & Process Map: This worksheet should contain your institution's major student success technologies and technology gaps/challenges mapped across key pillars of the student journey (Module 2.3)
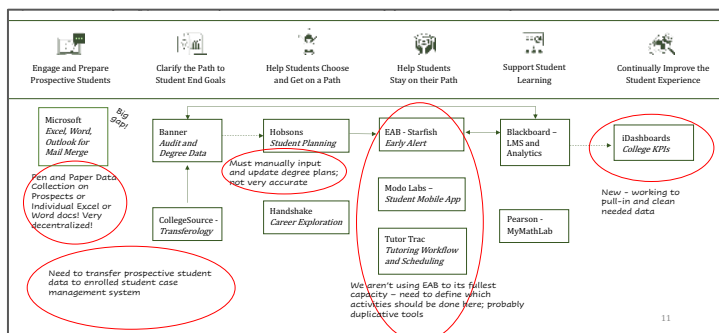
Orienting Around Outcomes

Discuss With Your Student Success Technology Planning Team:

Refer to your Strategic Initiative Alignment worksheet. Consider: What indicators would serve as evidence that the college had made progress on its discrete priorities, and more broadly, its high-level goals? These may be quantitative KPIs or completed action items.

You may already have some of these metrics defined through other strategic planning efforts. Feel free to consult your other internal strategy documents for this piece.

Add in your success metrics for each vertical on your Strategic Initiative Alignment Worksheet. (See page 7 for a blank template).

Example

	Reduce Barriers to Application & Enrollment	Streamline Student Communications	Strengthen Analytics to Support Retention
High-Level Goals	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
Success Metrics	• Increase transfer student enrollment by x% by 202X • Complete 80% of program maps by 202X • Hire and train X new onboarding advisors on process and new case mgmt. tool by Spring 202X	• Case mgmt. software usage up 20% across advising and student support units • Completed early alert guidelines and response process action chain by March 202X	30% improvement in LMS utilization data by Sept. 202X

Tech To-Do List Brainstorming

Discuss With Your Student Success Technology Planning Team:

Refer to your Master Technology & Process Map. Consider the technology and process challenges and gaps you have surfaced through the exercise (Module 2.3) or, if you have not completed Module 2.3, through other discussions about technology and process needs at your institution.

Consider: What technology-related projects might be needed to address these challenges or fill these gaps? If you have not yet done so, list these.

This is a brainstorming session, so all ideas are welcome! We will filter and sort these ideas later.

Technology Project Prioritization

Technology projects are rarely ever strictly technical. Almost all require additional strategic leadership and change management efforts. Additionally, the relative success of a project often relies not only on the quality of the technology tool or vendor, but also on the institution's ability to ensure projects have the right sequencing, resourcing, and focus. In other words, you can't do everything at once. This is where prioritization strategy comes in. Colleges that prioritize well ultimately leverage their resources more effectively, complete more projects more quickly, and as a result, achieve student success and equity outcomes more readily.

But, prioritization isn't easy. Institutions often run into three major challenges that can lead to some unfortunate (but all-too-common) prioritization missteps:

Underestimating Project Needs Leads to Strained Bandwidth
It can be difficult for colleges to assess how much staff bandwidth and/or additional resourcing a technology project will truly require. Teams are often caught off-guard by the bandwidth and resourcing needed for things like data clean-up, project management, and underlying process change management efforts.

Constantly Shifting Contexts Challenge Focus and Progress
The technology landscape – and, at times, the college context – changes constantly. New products are rolled out on the market. New leaders are put at the helm of college strategies. A new generation of students shift our understanding of what support may need to look like. While all plans require a degree of flexibility, without prioritization guidelines to specify *when, why, and how* projects should shift (or not), initiatives may stop and start constantly, creating inefficiencies, trails of incomplete projects, staff burn out, and ultimately, limited student success and equity outcomes.

Moving Forward With Technology Before Addressing Critical Process Questions
Technology can solve for some process challenges, but it can also replicate or exacerbate existing process challenges. Savvy colleges prioritize examining and clarifying processes that technology will impact before moving forward with technology projects.

Other Resources for Prioritization Strategy & Case-making

Module 4.4a and 4.4b: Realistic Prioritization

Curious how other institutions have approached prioritization? Module 4.4 provides additional guidance on prioritization during the product procurement process.

Technology Project Prioritization: Example

Hopefully, your team has gotten a chance to review some of our prioritization resources. In a resource-strapped environment, college teams need to be committed to making challenging decisions about which projects are must-dos vs. no-for-now's (but, if project streams are managed well, no-for-now needn't mean no-for-forever).

Instructions

(1) Copy each of your brainstormed tech to-dos onto a sticky note.

(2) Pull out your Strategic Initiative Alignment Worksheet. With your team, place each tech to-do item at the bottom of its most relevant column.

    a. If a project impacts more than one column (i.e., impacts different high-level goals), create a (or several) duplicate sticky note(s) for this project. Place a star on these stickies.

    b. If a project does not directly impact any of your columns, place it on the side.

Example

	Reduce Barriers to Application & Enrollment	Streamline Student Communications	Strengthen Analytics to Support Retention
High-Level Goals	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
Technology Project Ideas	Procure recruitment/admissions CRM Clean up degree data and input program maps to SIS	Procure recruitment/admissions CRM Audit Navigate features; overlap with other tools? Explore integration or "link-out" options from Navigate	Procure analytics module? Get user feedback on current data dashboards – what's missing?

Technology Project Prioritization: Worksheet

You may choose to use this template or to leverage this layout to draw a larger version on a white board or poster board for easier collaboration.

High-Level Goals			
Discrete Priorities			
Success Metrics			
Technology Project Ideas			

Parking Lot: Ideas That Do Not Fit Well In Any Columns
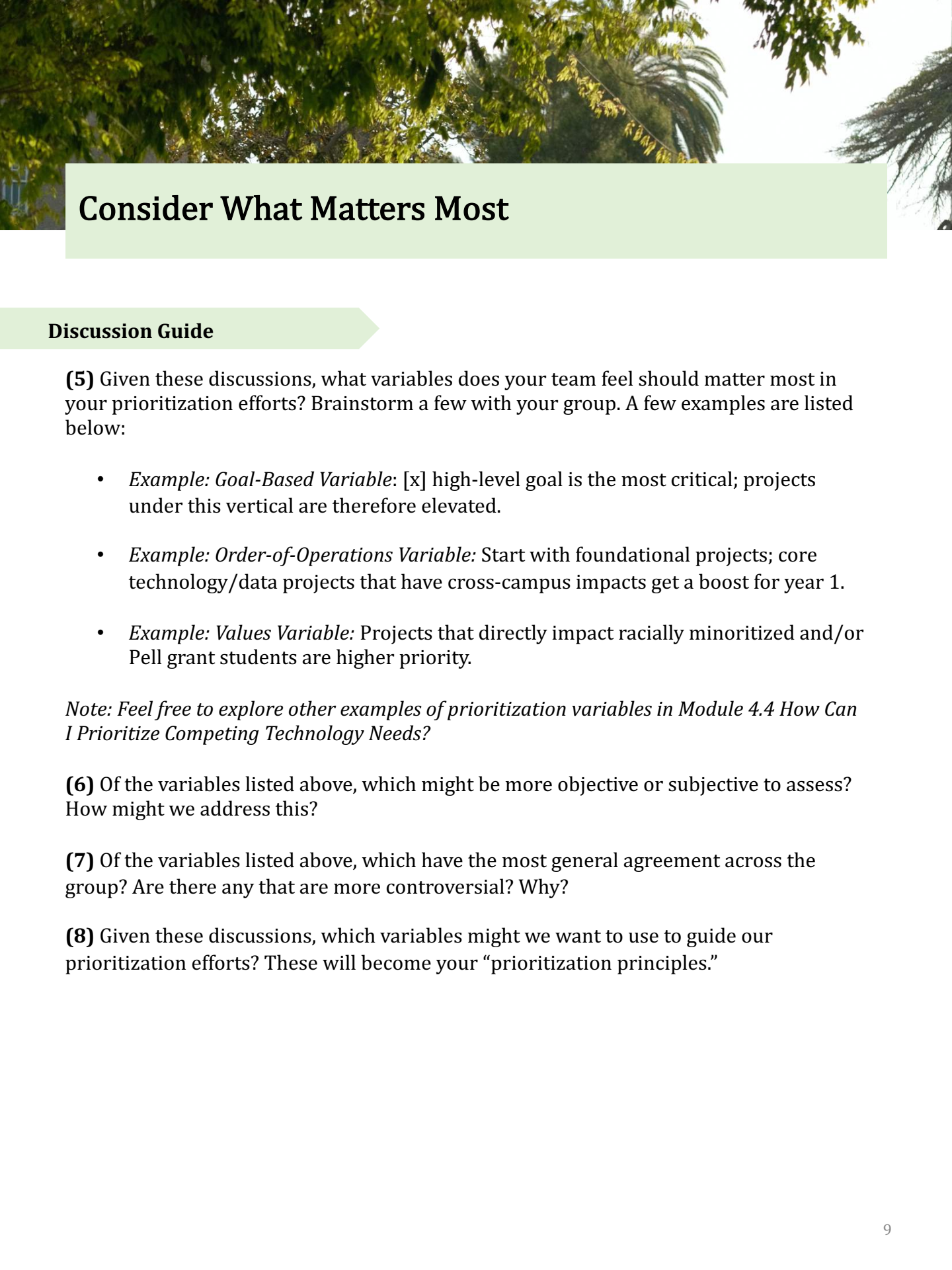
Consider What Matters Most

Now that you have your technology project wish-list organized across your high-level goals/initiatives, it's time to consider which items are most integral to pursue. Every college will have a different answer to this question because every college has a unique context; resources, goals, leadership, and existing capacity/skill varies widely.

So, while there is no one right answer, there are several important questions that strategic colleges leverage to kick off this process. Rather than analyzing each project individually, they begin by first defining what variables should be most influential in guiding their institution's prioritization strategy. We'll call these "prioritization tenets."

The following discussion guide captures some of the most impactful questions that your team should explore to eventually define your own prioritization tenets.

Discussion Guide

(1) **Strength of Goals Alignment:** Consider your technology project alignment exercise from Module 2.3. Which projects are most important to the success of each vertical (i.e., high-level goals, discrete priorities, and success metrics)? Which are least important/urgent? Given this discussion, are there any projects the group would consider moving down to the "parking lot"?

(2) **Order of Operations:** Consider all your technology projects. Are there any that have critical pre-requisites for other projects/initiatives? For example, you might need to fully implement your new case management system before considering whether or not to procure a bolt-on tool/feature. (Hint: These projects are usually foundational "housekeeping" items that are deeply important but often overlooked or put on a backburner. They may also be some of the projects you starred because they span multiple verticals.).

(3) **Invisible Needs:** Are there any projects that, upon examination, require additional efforts (e.g., process mapping, data clean-up) before they begin? How might this affect how you think about prioritizing these projects?

(4) **Institution Values:** What core institutional values should be taken into consideration for prioritization? These might include ideas like, "students first," implying that projects that directly impact the student experience (e.g., student portal) be prioritized over other projects that may be more tangential to the student experience.

Consider What Matters Most

(5) Given these discussions, what variables does your team feel should matter most in your prioritization efforts? Brainstorm a few with your group. A few examples are listed below:

- *Example: Goal-Based Variable*: [x] high-level goal is the most critical; projects under this vertical are therefore elevated.

- *Example: Order-of-Operations Variable:* Start with foundational projects; core technology/data projects that have cross-campus impacts get a boost for year 1.

- *Example: Values Variable:* Projects that directly impact racially minoritized and/or Pell grant students are higher priority.

Note: Feel free to explore other examples of prioritization variables in Module 4.4 How Can I Prioritize Competing Technology Needs?

(6) Of the variables listed above, which might be more objective or subjective to assess? How might we address this?

(7) Of the variables listed above, which have the most general agreement across the group? Are there any that are more controversial? Why?

(8) Given these discussions, which variables might we want to use to guide our prioritization efforts? These will become your "prioritization principles."

Our Prioritization Principles: Worksheet

Draft With Your Student Success Technology Planning Team:

When you are ready, draft the prioritization tenets. These are the 3-5 ideas or variables that will help to guide your prioritization efforts. Some colleges choose to rank these by importance or leverage them to create a prioritization rubric. Others simply use them holistically to guide strategy discussions. It may be helpful to also include explanatory text for each tenet to make them easy to share out across campus with clarity and consistency.

Draft Your High-Level Plan

When you are ready, test out your prioritization tenets by using them to guide which technology project ideas should be slotted into your high-level student success technology plan. You may choose to order them by importance and urgency, put a few of the most vital projects in bold, or simply list them for now. Keep your list of parking lot items on the side.

Keep in mind that these are the projects that you would like to prioritize over the next 2-3 years to progress your institution's high-level goals.

Also note that this is a high-level plan. If you have an abundance of projects that relate to one another (e.g., capture multiple, detailed steps within a larger undertaking), consider collapsing these into a single idea.

And finally, note that this is a draft. In the next and final section of this module, we will explore how to vet and fine-tune this plan with other key stakeholders.

Example

	Reduce Barriers to Application & Enrollment	Streamline Student Communications	Strengthen Analytics to Support Retention
High-Level Goals			
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
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Technology Project Ideas	• Student Information System (SIS) field completed for advisor assignments • Partner with academic affairs, records, and advising to clean-up degree data and input program maps • Procure prospect management CRM and ensure custom workflow for transfers	• Audit existing case management and student interaction tracking tools and initiate tool sunsetting/unit training for migration to case management system • Explore integration and/or "link out" options for tools that will not be sunset • Revisit Navigate implementation roadmap to prioritize high-need features; assign Navigate PM	• Work with Navigate implementation consultant to define /pull key data into Navigate; leverage faculty input • Develop skeleton predictive analytics algorithm and indicators alongside Equity Taskforce

Next Steps

Congratulations! You have completed Module 2. Developing your prioritization tenets and, ultimately, the technology projects that you would like to pursue in the immediate future may take several attempts and more than a few group discussions. But it's important to define these pieces now as much as possible to avoid costly strategy drift and/or overextension later.

Next up is Module 3, which will bring our thinking back to the people who matter the most – our students!

✓ *Read Me!* Module 2.1 How Does My College Create a Student Success Technology Plan?
⏳ <1 hour

✓ *Read and Plan* Module 2.2 Student Success Technology Planning Team
⏳ 1– 2 hours

✓ *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

Module 2.4 Reflection:

1) How might we share and vet our prioritization strategy guiding tenets with the broader institution? (Note: Broader buy-in is important as, ideally, these tenets will be used to rationalize how your plan evolves, including which projects are added, elevated, shifted, or deprioritized over time).

2) What open questions do we have about the items listed on our high-level plan (e.g., resource needs, estimated timelines, etc.)? Who or what might be a good resource to get these questions answered?
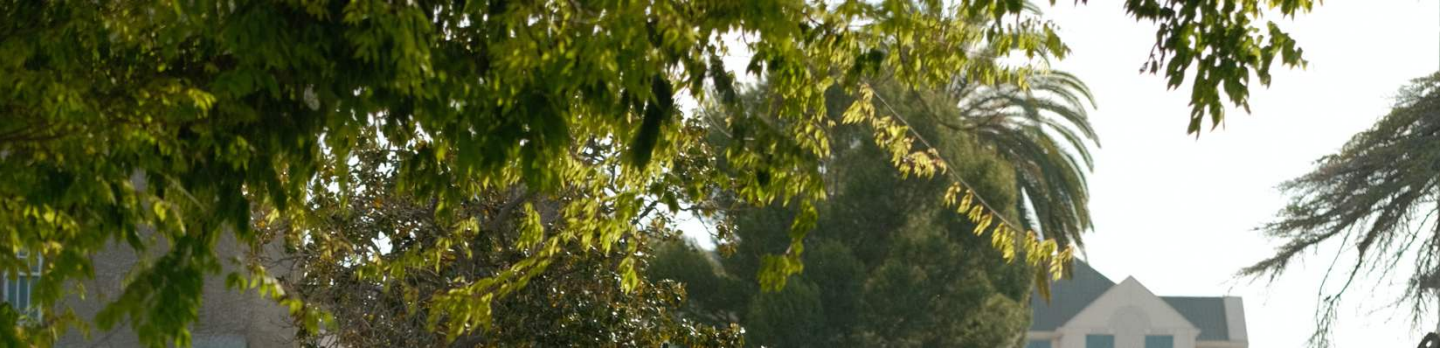
About This Series

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.

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.

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