How Should We Approach Buying New Technology?

Module 4.1

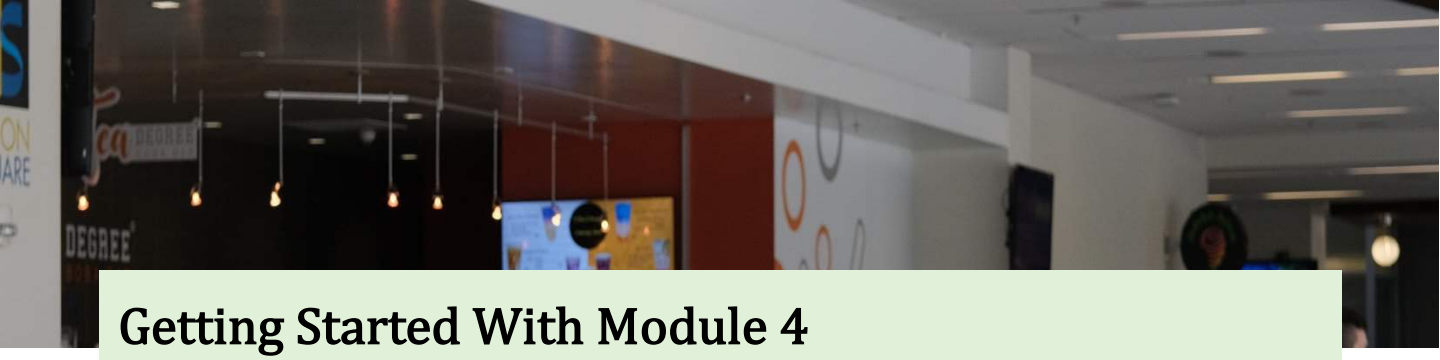
Contents

This resource will be most useful for institution leadership, technology procurement teams and/or steering committees engaged in student success technology strategy

COMPLETE COLLEGE AMERICA

The Ada Center

ADVISING SUCCESS NETWORK



Getting Started With Module 4

Selecting the right technology product and vendor partner is no easy feat. Today's higher education technology marketplace boasts hundreds of vendors and thousands of products to choose from. Add to that the diverse needs of your student body and the varying needs of your institution's departments, and the task of identifying the right solution can feel overwhelming. Additionally, compatibility with existing systems can be a challenge, and resource constraints often limit the options.

This module will provide you with practical insights and best practices to help you navigate this complex landscape, put together an effective procurement team and intentional procurement process, and ultimately support your institution's efforts to find technology solutions that are aligned to your needs and mission.

What You'll Learn:
Module 4 Learning Objectives

- What should an inclusive and effective procurement team look like, and why?
- How do we clearly define what products/features we really need given our unique context and goals?
- How do we prioritize our technology needs given limited resources?
- How do we separate fact from fiction as we explore vendors and products?
- What major variables should influence our product evaluation and selection?

How You'll Learn:
Module 4 Contents and Resources

<u>Module 4:</u>
4.1: *Read Me!*
How Should We Approach Buying New Technology?

4.2: *Watch and Complete*
Creating "User Stories" To Guide Procurement – Webinar

4.3: *Review and Complete*
Check Your Basement: Avoiding Duplicative Technology

4.4: *Watch and Complete*
How Can I Prioritize Competing Technology Needs? – Webinar

4.5: *Read and Apply*
RFP 101: Getting Insight Without "Giving Away the Answers"

4.6: *Read and Apply*
Vendor Engagement Toolkit

Strategic Planning And Procurement

Over the past few decades, education technology has evolved at an incredible pace. Cutting-edge tools at our fingertips now allow us to gain a deeper understanding of students' needs and can help us to proactively intervene with the support they require. Early alerts can tell us when a student is at risk of falling off track, administrators can tap into the power of disaggregated data to address various inequities, and leaps in artificial intelligence development continue to push on the boundaries of what is possible within our institutions.

While some institutions have embraced these new technologies and achieved impressive gains in student retention and completion rates, the story hasn't been the same everywhere. Instead, many institutions find that, despite investing thousands of dollars and countless staff hours, their grand visions falter….

Voices From the Field: Common New Technology Issues

Features do not work as expected

*"The demo showed this beautiful student profile, but **in reality, it's clunky**, and it's not showing me the analytics I thought it would!"*

- VP Student Success

Tool Works, But Lacks Impact

*"I **don't really use it**. I'm not sure why they bought it for us, it doesn't have the main features I'd really want or need."*

- Advisor

High Cost, Extended Timelines

*"It's been two years and it's still not where it should be. The **costs are adding up with each passing day** with little to show for it.*

- Associate Provost

Strategic Planning And Procurement

So what separates those projects that succeed from those that falter? Extensive research by The Ada Center has confirmed that proper planning and thoughtful procurement are crucial to the ultimate success of these endeavors. This is because, often, many of the root causes of issues that arise later in the implementation can be traced back to missteps in planning and procurement.

Let's take our three examples on the prior page:

What They Said...		What Went Wrong?
Features Don't Work As Expected	*"The demo showed this beautiful student profile, but **in reality, it's clunky**, and it's not showing me the analytics I thought it would!"*	⚠ Vendor Q&A and Discussions Missed Key Questions ⚠ IT or Data Team Not Included Enough in Procurement, Planning
Tool Works, But Lacks Impact	*"I **don't really use it**. I'm not sure why they bought it for us, it doesn't have the main features I'd really want or need."*	⚠ End-User Feedback Insufficient During Procurement Process ⚠ Feature Prioritization Misaligned With User Needs, Goals
High Cost, Extended Timelines	*"It's been two years and it's still not where it should be. The **costs are adding up with each passing day** with little to show for it.*	⚠ Overlooked Need for Data Cleanup Before Implementation ⚠ Underestimated Resources, Bandwidth Needed for Project Management

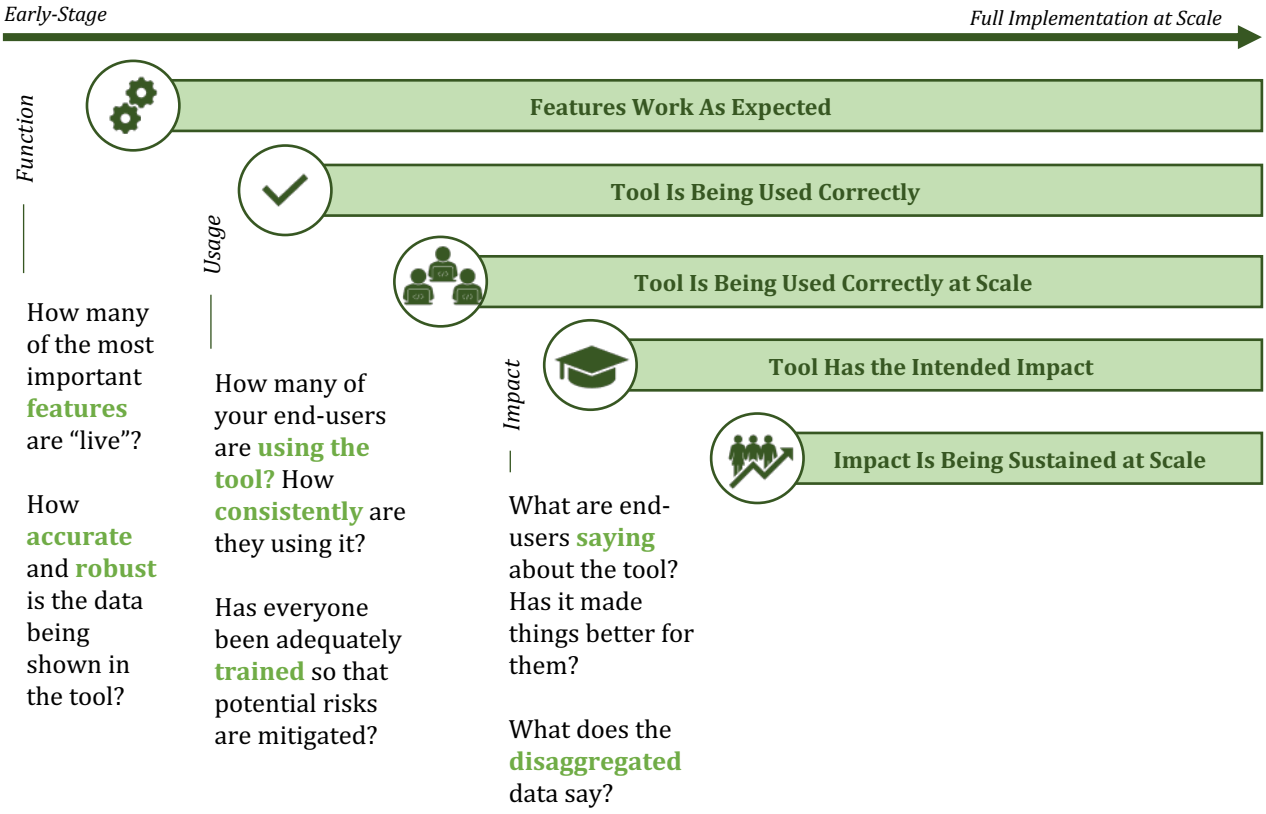
Strategic Planning And Procurement

Of course, there are other factors that can positively or negatively impact a technology initiative, but the truth remains: thoughtful planning and procurement is the essential first step toward proactively mitigating project risks and setting up projects for success.

But what does success look like? The answer to this is, it depends. The Ada Center recognizes the following benchmarks that build upon one another from early-stage adoption through full implementation at scale:

What Does It Mean to Have a "Successful" Technology Acquisition?

Multiple Success Indicators Should Emerge Across Adoption Period



Across Module 4 and Module 5, we will refer to this model as we walk through what it takes to move a project from planning through procurement and successful, scaled implementation and adoption. But first, you will need to assemble your team…

Building An Inclusive Procurement Team

Getting Started

At institutions with the strongest technology ecosystems, buying major new technology is a team effort. By fostering an inclusive procurement process, these institutions can more accurately assess end-user needs, proactively identify and address initiative risks and roadblocks, account for capacity and resource constraints, and ultimately determine the most suitable products for the institution.

A well-rounded procurement team typically comprises 8-12 core members, including end-users, technical and data leads, as well as strategy and resourcing leads.

In the next few pages, we will guide you through the process of brainstorming an inclusive list of key individuals for your technology procurement team. Take some time to consider the questions tailored for each major stakeholder group, as well as the sample roles and titles provided. Feel free to jot down the names of several individuals from your institution who you believe would make valuable contributions as members of your procurement team.

Building An Inclusive Procurement Team

Stakeholder Group 1: End-Users

Which individuals or groups will be **using the technology** on a day-to-day basis? Who manages or advocates for these groups?

Which individuals or groups will **need to input information** into the new technology? Who manages or advocates for these groups?

Sample Titles:

Note: Most institutions do not include all of these titles; selection varies by college structure and goals.

- VP Student Services
- Director of Advising
- Student Supports Rep. (if not covered by VP Student Services)
- Students
- Enrollment/Admissions
- Faculty Advising Rep.

My List *Consider the questions above. Jot down the end-user representatives that you might need to include on your team:*

Building An Inclusive Procurement Team

Stakeholder Group 2: Technical and Data Support

What kinds of **data** (e.g., academic course data, student information) will be used or impacted by a new technology? Who manages this data?

Which **technology systems** "touch" (i.e., integrate with, push to, pull from, are replaced by) the new tool? Who oversees these systems?

Critical Action: Involve IT and Data Leads Early-On

Successful institutions understand that the best technology plans can go awry if they do not account for the realities of the institution's existing technology and data ecosystem. Hundreds of thousands of dollars can be wasted, for example, by implementing a technology that does not integrate well with the institution's core systems and therefore requires a heavy and unanticipated manual lift to keep data updated.

Sample Titles:

- Head of IT
- Registrar
- Institutional Research (IR) Lead or Data Representative

My List

Consider the questions above. Jot down the IT and data experts you might need to include on your team:

Building An Inclusive Procurement Team

Stakeholder Group 3: Strategy and Resourcing Leads

Which leaders are in touch with **broader institutional reforms** that relate to the technology?

Which leaders **manage resources** that will be needed to successfully procure, implement and sustain the technology? (Hint: Consider human resources, funding, physical resources, etc.)

Sample Titles:

- Senior Academic Affairs/Provost
- VP of Student Success or equivalent
- CFO/Finance
- HR Representative (if acquisition will affect staffing)

My List

Consider the questions above. Jot down the leaders you might need to include on your team:

Building An Inclusive Procurement Team

Does Your List Include Important Archetypes?

While including people from specific departments and with certain titles and responsibilities is important, highly effective procurement teams also assess whether the following roles are represented somewhere within the group:

Leads (Technical and Non-Technical)
Technical and non-technical lead to help aggregate feedback from across functional areas, move the project forward, and ultimately recommend a product to college leadership. Technical leads often come from IT, understand the existing technology ecosystem, and are therefore able to accurately anticipate and respond to technical challenges across the project lifecycle. The non-technical lead represents end-users and has a clear view into how the technology should ultimately support user needs and student success goals.

> *Project leads are simultaneously often the most important team members. As we will see in Module 5, they often not only support procurement and planning, but also serve as primary project leaders across implementation. Unfortunately, they are also often the most overlooked or under-resourced team members. One of the most common mistakes that institutions make is to underinvest in project leads, either by failing to assign both a non-technical and technical lead at all, or by not recognizing that leads will need to offload other responsibilities to have the bandwidth to effectively manage major technology initiatives.*

Influencers
These individuals are usually senior leaders, but can also include people who, due to their tenure, connections, or personality, hold political sway across the institution. Think of, for example, a well-respected faculty member who could influence how other faculty engage with a new early alert system. Influencers have the power to get things done or shut things down, and it will therefore be important to have them on board for major decisions.

Building An Inclusive Procurement Team

Champions
Enthusiasts who are eager for change and motivated to evangelize for the project across the institution. Ideally, there are several of these champions within the end-user group and dispersed across different departments and/or campuses.

Sometimes, a Champion might feel deeply committed to a specific product, particularly if they've had experience with it before. While "insider information" can be helpful, make sure this Champion does not persuade the group to make decisions without adequate due diligence and option vetting.

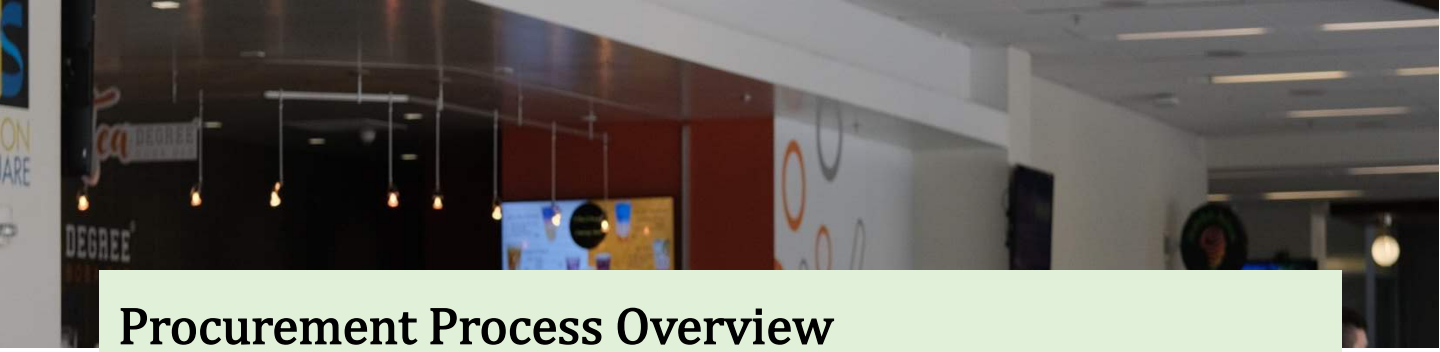
Critical Friends
Just as important as having enthusiasts to drive the project forward is having rational critics to represent divergent views and raise potential flags. Importantly, these individuals should not be incendiary or adamantly against the core goals of the project.

Review the people/groups you included in the prior sections and complete the checklist below. Consider: Do we have everyone that we need?

- ✓ Who are my Technical and Non-Technical Leads?
- ✓ Do I have both Champions and Critical Friends? Does this feel like the right balance? If not, who else might I need to include?
- ✓ Do I have Influencers? Are there other Influencers who may need to be brought in intermittently?

Total Count: _____

Consider: If this is a large number, are there people here who can be involved in some of the bigger milestones and less in the day-to-day?



Procurement Process Overview

Once you have your procurement team in place, the key to an effective procurement process lies in adopting a strategic approach. This involves initiating critical discussions and planning activities that enable the team to:

- Understand user needs and align on specific technology goals.
- Realistically confront capacity constraints and prioritize technology tools accordingly.
- Navigate a crowded technology marketplace with purpose and focus.

Since Module 1 already covers the basics of the higher education technology landscape, this module will explore the following stages of a strategic procurement process:

Defining

There are many technology tools and features on the market. It can be easy to get swept up in the newest product demonstrations or to lose track of what your end-users require. Strong procurement teams are adept at clearly defining:

- *What **specific** technology capabilities or features do our end-users need to achieve our goals?*

Scoping & Prioritizing

Without thoughtful planning, technology wish lists can become unwieldly. Effective scoping involves pulling out our technology plan (See Module 2) and asking:

- *Which tools are **most important** to acquire, replace or upgrade given our current ecosystem and goals?*
- *How do we **sequence** features or tools to ensure we can handle our projects given our capacity and resources?*

Evaluating & Selecting

Finally, teams facilitate product demonstrations, craft mission-aligned RFPs and evaluation guides, and engage vendors in thoughtful Q&A sessions in order to explore:

- *What vendors and tools that meet our needs are **available** on the market?*
- *How can we **compare** products to choose the right technology and vendor partner for us?*

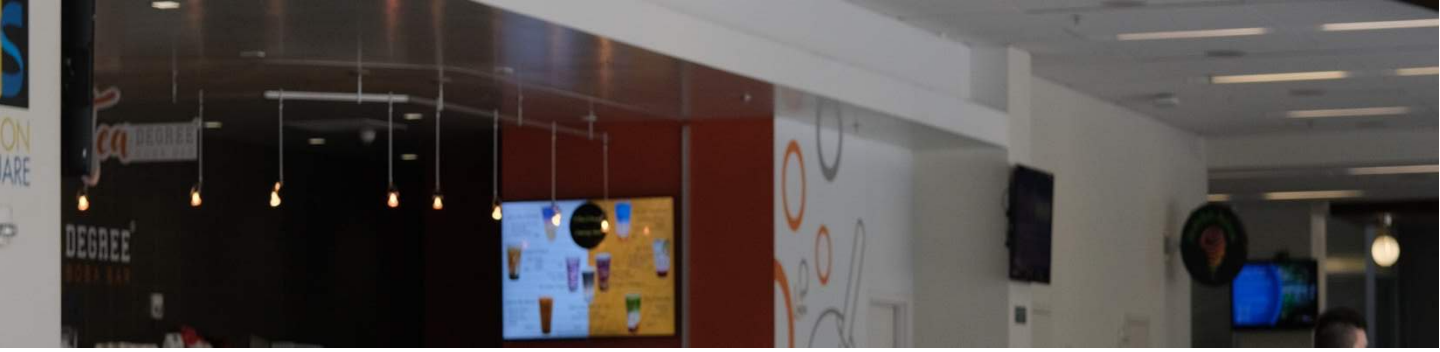
Next Steps

At this point, you should have a good sense of who to include on your procurement team and what to expect across the procurement process. The following module sections will help to guide you and your team through a strategic process that should help you to approach buying new technology with clarity and focus.

- [x] *Read* Module 4.1 How Should We Approach Buying New Technology?
  - <1 hour
- [ ] *Watch and Complete* Module 4.2 Creating "User Stories" to Guide Procurement – Webinar
  - 3-4 hours
- [ ] *Review and Complete* Module 4.3 Check Your Basement: Avoiding Duplicative Technology
  - 2 hours
- [ ] *Watch and Complete* Module 4.4 How Can I Prioritize Competing Technology Needs? – Webinar
  - < 1 hour
- [ ] *Read and Apply* Module 4.5 RFP 101: Getting Insight Without "Giving Away the Answers"
  - 3-4 hours
- [ ] *Read and Apply* Module 4.6 Vendor Engagement Toolkit
  - 1-2 hours

Module 4.1 Individual Reflection:

1) What baseline norms and expectations might you want to establish to ensure that everyone on the team can contribute effectively across this process?
2) Consider the role that you will play on your procurement team. What opportunities or challenges do you believe might exist for you in this role going forward?



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.

COMPLETE COLLEGE AMERICA

The Ada Center

ADVISING SUCCESS NETWORK