

Check Your Basement: Avoiding Duplicative Technology

Module 4.3

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

Case Study: Check Your Basement!

It was a familiar story. Sierra College, like many of its peers, was convening teams to discuss how they could boost their capacity to manage and implement remote advising.

Their procurement efforts were thoughtful and inclusive, and the team eventually found itself considering two different products: Zoom, the go-to tool of the pandemic era across every industry, and ConexEd, a tool created specifically for the education space.

“We were really excited about ConexEd at first. Though Zoom was cheaper, ConexEd had a broader set of functionality, like an early alert functionality and the ability for advisors to take notes.” Explained Jelrose Wraight, Sierra College’s project lead at the time.

For many colleges, this might have been the end of the story. But Sierra College then took a critical next step: “You have to check your basement.” Wraight advised.

By this, she meant that the team needed to consider two questions in parallel:

❓ *What capabilities do users say that we need?*

❓ *What capabilities do we already have?*



For Sierra College, interviews with end-users had revealed a deep and specific need for easy video conferencing.

By taking a moment to pause and audit their existing tools, the college team also realized that they already had Starfish (now owned by EAB). While the supplemental features that ConexEd offered were exciting, “Starfish could do a lot of the same things already.” Wraight explained. In the end, Zoom was the better fit for the college. It met user needs and avoided the college paying up for duplicative technology.

No institution is a blank slate. That’s why savvy procurement teams understand the value of “checking the basement.” For Sierra College, this exercise helped the team to choose between two products. In other cases, this audit can illuminate existing tools that should be sunset and replaced or, alternatively, upgraded and scaled across the institution.

Coming up, this module will guide you through how you can perform your own basement check to identify best-fit tools for your institution’s unique ecosystem.

Ecosystem “Basement” Audit: Example

When it comes to technology, more does not necessarily mean better. Duplicative technologies are not only a waste of institution resources, but they can also create confusion among end-users and lead to inconsistencies in data input and storage practices. At one institution, advisors entered student notes in both an institution-wide CRM tool and a targeted advising appointment system, leading to a fragmented view of students across multiple systems and a lack of centralized data. As the Institutional Research team explained, “If you ran a list of students with a certain tag in one system, you’d get one output and if you ran it in another, you’d get another...it was a mess. Forget about any analytics!”

Rather than dealing with these complexities, successful institutions take a systematic approach. Once they have a list of user stories (See Module 4.2 Creating “User Stories” To Guide Procurement), they assess whether the capability already exists within their current technology stack. If found, they can proceed with better utilizing it and/or better explaining its availability and capabilities to end-users. However, if capabilities are truly missing or lacking, they then explore options like procuring a new tool or upgrading or augmenting current systems.

Example from “Anywhere State University”

User Story <i>One per line, specify user title and function (e.g., Advisor can...[action],”)</i>	Do We Already Have This Capability? (Y/N) If “Yes”, What Is The Name of the Existing Tool?		Next Step: <i>Indicate:</i> <ul style="list-style-type: none"> • Buy • Build On Existing • Improve Usage of Existing
Advisor can see a list of existing students/caseload	Y	Y - Excel	Buy – Excel not sufficient
Advisor and support staff can see student profile with classes, recent communication, grades, and notes from other support staff and faculty in a user-friendly interface	N	Y/N – Banner + Portal	Buy/Integrate – Portal has some of this but is still in build mode; Banner requires heavy manual lift for many tasks. New CRM can provide more seamless user experience, push/pull data from Banner, and link to Portal

Ecosystem “Basement” Audit: **Worksheet**

User Story <i>One per line, specify user title and function (e.g., Advisor can...[action],”)</i>	Do We Already Have This Capability? (Y/N) If “Yes”, What Is The Name of the Existing Tool?		Next Step: <i>Indicate:</i> <ul style="list-style-type: none"> • Buy • Build On Existing • Improve Usage of Existing
	<i>Y/N</i>	<i>Tool Name</i>	

Next Steps

Now that you have “checked your basement,” your team should have a better sense of which technology features you need to buy, as well as perhaps some insights about which existing technology tools you may need to re-examine. Next up, we will get more specific about how to build a technology requirements list that aligns with your institution’s needs and goals. This list will help to keep the team focused as we move through RFP drafting and product selection.



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 4.3 Individual Reflection:

- 1) Were you surprised about any of the capabilities of the tools your institution already has? Were there any tools that stood out as being underutilized? Why do you think this is the case?
- 2) Were there any tools that you feel like will need to be integrated with newly procured technologies? How might you explore how feasible this integration may be?



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.