Developing a Best-Practice Faculty Training Strategy

August 13, 2019

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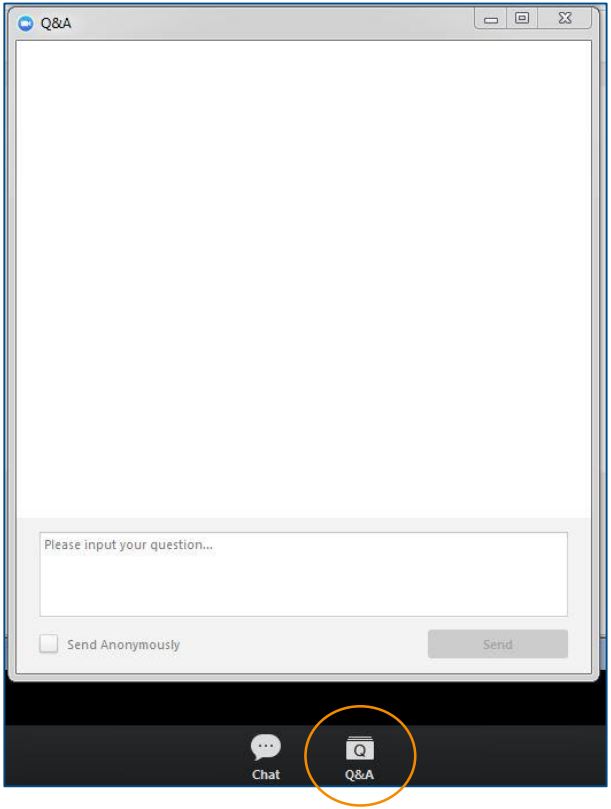

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Today's Presenters

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1 **Faculty Engagement as Utilization**

2 Developing a Faculty Training Strategy

3 Highlighting Best Practices

4 Looking Ahead

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Specifying What 'The Faculty' Means Is Crucial

Articulating the 'Why' for Each Audience is an Important First Step

"Engagement" is ambiguous.

Often, engagement is used to mean utilization rather than discourse.

"The Faculty" is vague.

Target groups of faculty who have the most to gain by utilizing the platform.

"We need to engage the faculty this year."

"We need the faculty to use the platform this year."

"We need the deans in the College of Science to use Institution Reports this year, as they are redesigning several majors."

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Creating an Actionable Plan to Rollout to Faculty

Highlighting Compelling Use Cases for Different Audiences

Faculty Advisors	Instructors	Academic Leadership
Appointment Scheduling	Manage Office Hours	Effectiveness Analytics
Advising Summaries	Reports & Notes	SSMS Activity Analytics
Campaign Management	Smart Student Profile	Population Health Analytics
Smart Student Profile	Early Alerts	Institution Reports & Success Markers

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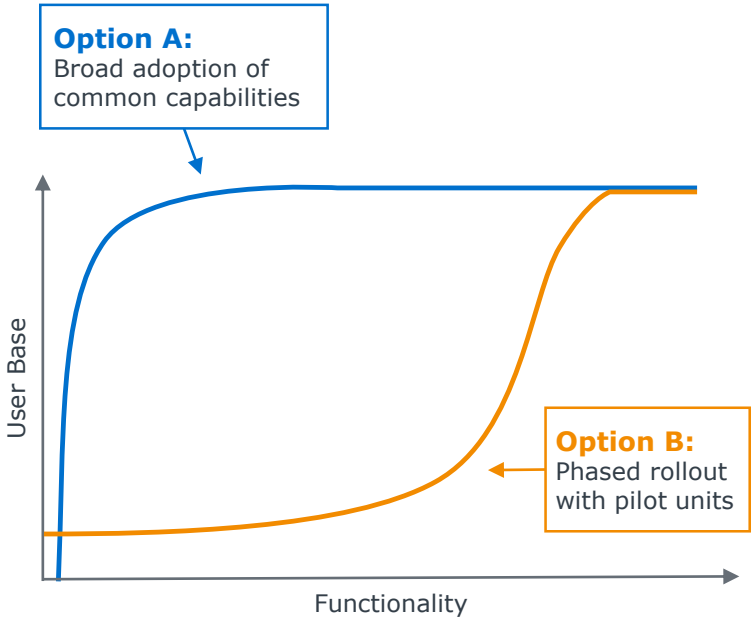
Customizing Rollout Strategy

Weighing the Pros and Cons of Scaling by User Base vs. Functionality



Considerations

- Best strategy is based on your goals—fast adoption, standardization, certain functionality, etc.
- Consider what your system of record will be during rollout
- Rolling out by functionality helps users with training
- Variations of these 2 options exist based on your goals

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Plan for Initial Adoption & Follow-Up

Rollout of Navigate to Faculty Is an Ongoing Process

Develop Particular Student Success Goals

When possible, involve faculty in larger conversations about Student Success goals. Technology is a tool to support these initiatives.

Engage Faculty Directly & Consistently

Leverage personal and professional relationships to communicate *why* Navigate is vital to supporting Student Success.

Provide Training & Instill Accountability

Send nudge emails from Leadership to provide just-in-time resources and transparency into the use of information provided by faculty.

Rinse and Repeat: Provide ongoing open communication with faculty, making utilization of the technology the norm.

Existing Navigate Resources to Support Faculty Utilization

Communication Strategy Toolkit

Strategies for Engaging Faculty Advisors

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Training Strategy Approaches

Active Training

Platform Walk-Through: Conduct formal walk-throughs of Navigate. Ask advisors to attend, follow along, and ask questions.

Office Hours: Host informal times when advisors can come into a dedicated space to help one another and ask questions.

Note: Plan these training sessions ahead of time to establish a regular cadence; ensure you are targeting multiple audiences and platform components.

Self-service Training

Resources in Help Center: EAB provides training guides that we recommend you pare down and/or customize to share with advisors. Ensure that these documents are digestible and easily accessible.

Microsites: Institutional microsites are a great place to announce platform updates and store frequently-asked-questions

Note: Ask your consultant for EAB member examples!

Proactive Training

Onboarding/Hiring Training: Ensure that new advisors are acclimated to Navigate as soon as they join your institution.

Persistent Training: Use advisor retreats, all-hands meetings, or roundtable discussions to share key functionality and success stories within Navigate.

Note: Champion superusers to share wins by highlighting & rewarding their wins at existing meetings. Consider how Navigate can be part of ongoing conversations to better advising at your institution.

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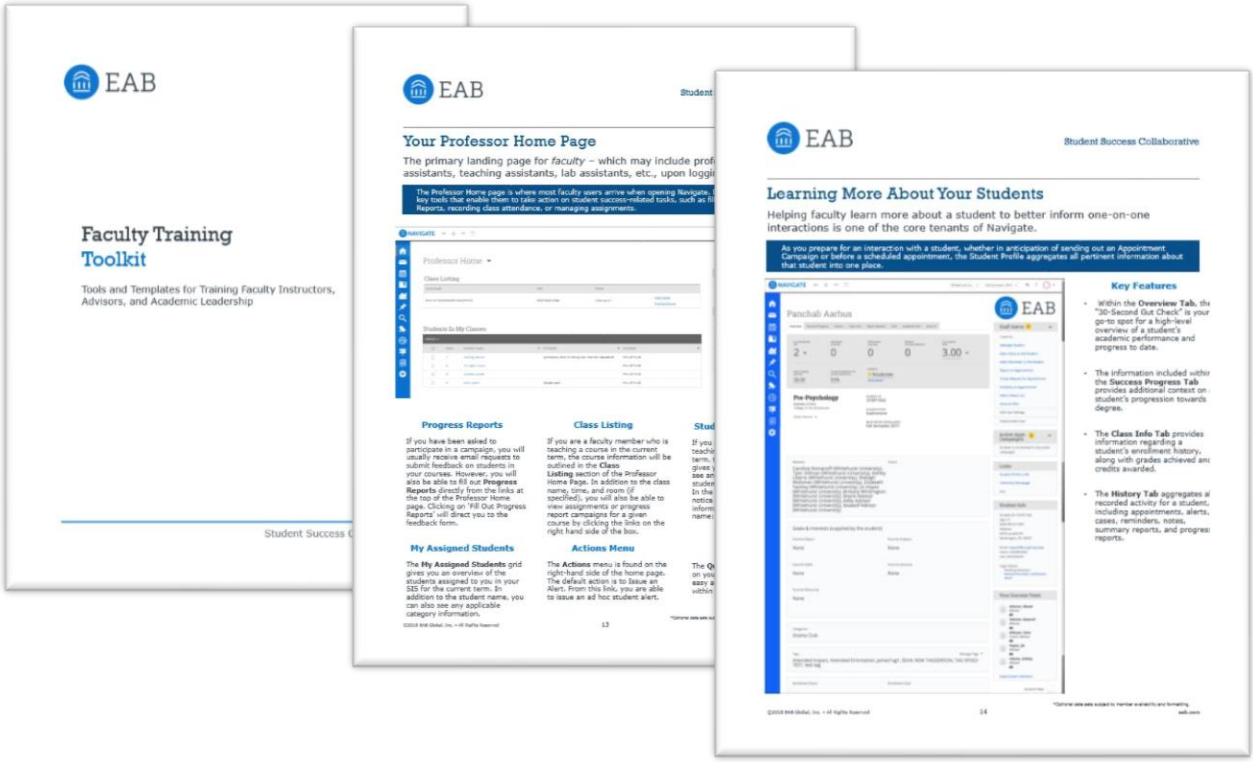
New Resource: Faculty Training Toolkit

Distributed Prior to Today's Webinar



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Laying the Foundation for a Successful Training Strategy

Introduction

Prior to training, it is important to consider:

1) How your institution has facilitated faculty participation and buy-in to broader student success initiatives
2) Your overall **expectations for faculty utilization** of the Navigate platform

Your progress-to-date in these areas should:

1) Inform your approach to training faculty end-users on the Navigate platform
2) Help you establish realistic and **specific expectations of instructors, faculty advisors, and academic leadership**

For guided exercises to help you consider these questions, as well as consider examples from across the Collaborative, ***see pages 4-12 of the Toolkit.***

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Let's Talk Strategy

Aligning to Your Training Plan to Your Student Success Goals

Questions to Consider

- How has your institution facilitated faculty participation and buy-in to broader student success initiatives? To the Navigate project?
- What is your "elevator pitch" for Navigate? Is your language faculty-friendly?
- What are your expectations for faculty utilization of the Navigate Platform?
  - How does this differ by academic units or particular faculty roles?
- What resources do faculty currently use for training or learning opportunities? Is there an opportunity to partner with these offices?
- When and where should training opportunities take place?
- What kind of documentation will you provide to faculty?
- How will you encourage my faculty to attend training, and/or hold them accountable for doing so?

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How Will You Achieve Your Goals?

Example: A Phased Approach to Training

Level 1: Introduction to Navigate

- **Audience**: all faculty instructors, teaching/graduate assistants, and/or faculty advisors
- **Content**: Introducing Navigate, Professor Home Page, Learning More About Your Students
- **Time/Place**: Onboarding and Annual Professional Development Opportunities

Level 2: Communicating and Meeting with Students

- **Audience**: faculty instructors, teaching/graduate assistants, and/or faculty advisors who meet with students
- **Content**: Searching for, communicating with, and documenting meetings with students
- **Time/Place**: Monthly, Center for Excellence in Teaching & Learning

Level 3: Scheduling Meetings with Students

- **Audience**: faculty advisors and instructional faculty and/or graduate assistants who want to schedule meetings with students
- **Content**: Calendar Sync, Availability, Appointment Campaigns
- **Time/Place**: Prior to the term start and prior to advising week, by College

Level 4: Strategic Presentations & Workshops

- **Audience**: Varies based on content
- **Content**: Varies. Examples include developing strategic appointment campaigns, and hardwiring best practice research with Navigate
- **Time/Place**: Onboarding and Annual Professional Development Opportunities

Training for Academic Leadership

- **Audience**: Deans and Chairs
- **Content**: Identifying student cohorts, Navigate analytics, and assessing the impact of your student success initiatives
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Level 1 Training

Introduction to Navigate: For All Faculty Instructors, Teaching/Graduate Assistants, and/or Faculty Advisors

Questions to Consider

- Which faculty users do we expect to login to the platform?
- How can Student Success Management System support their role in Student Success?
- What is the minimum shared functionality and permission-level among these users?

Introducing Navigate

Introducing EAB's Student Success Management System (SSMS)

Our **Student Success Management System** is an **enterprise-level technology** that links administrators, advisors, deans, faculty, other staff, and students in a coordinated care network designed to help schools **proactively manage student success** and deliver a **Return on Education.**

How It Works
EAB Analytics Use Machine Learning to Turn Historical Patterns into Current Insights

Unlock the power of data analytics and machine learning to bring timely student success management **intelligence** to administrators and leaders.

Create a connected and coordinated network of support for every student, enabling targeted intervention and proactive, **strategic care.**

Provide **smart guidance** and intelligent information at the most pivotal moments students encounter in college, simplifying and structuring the student journey to completion.

Intelligence *For Administrators*

Unlocking the power of SSC's data analytics

Institutions at advanced levels of SSM Intelligence consistently collect historical data from across the institution. Members use data to drive day-to-day activity and inform intervention strategy, and review data to track progress and make improvements.

Strategic Care *for Faculty and Staff*

Creating a connected and coordinated support network for all students

Institutions at advanced levels of SSM Strategic Care strategically use Navigate to provide holistic care to all students. Members rely on cases, alerts, and campaigns to serve all students and to ensure seamless coordination between all student support offices.

Smart Guidance* *for Students*

Providing curated guidance at the most pivotal moments in each student's journey

Institutions at advanced levels of SSM Smart Guidance empower students to succeed through customized, student-friendly guidance in-real time and automatically notify them when they make a misstep to help them stay on the right path.

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For one-pagers to guide your discussion, or to provide to end-users attending Level 1 Training, ***use pages 13-16 of the Toolkit.***

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Level 2 Training

Communicating and Meeting With Students: For Faculty Instructors, Teaching/Graduate Assistants, and/or Faculty Advisors who Meet with Students

Questions to Consider

- Which faculty users meet or communicate with students (in classes, office hours, appointments, or otherwise)?
- What do these users know about their students? What do they want or need to know?
- Do you have an email or text communication policy in place? How does this apply to faculty?
- What other technologies are faculty already using to communicate with students?
- Are faculty encouraged or required to hold or publish office hours?

For one-pagers to guide your discussion, or to provide to end-users attending Level 2 Training, ***use pages 17-20 of the Toolkit.***

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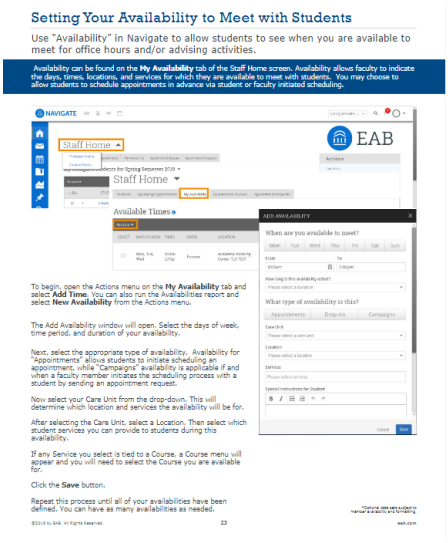
Level 3 Training

Scheduling Meetings with Students: For Faculty Advisors And Instructional Faculty and/or Graduate Assistants who Want to Schedule Meetings with Students



Setting Your Availability to Meet with Students

Use "Availability" in Navigate to allow students to see when you are available to meet for office hours and/or advising activities.

Availability can be found on the **My Availability** tab of the Staff Home screen. Availability allows faculty to indicate the days, times, locations, and services for which they are available to meet with students. You may choose to allow students to schedule appointments in advance via student or faculty initiated scheduling.

To begin, open the Actions menu on the **My Availability** tab and select **Add Time**. You can also run the Availabilities report and select **New Availability** from the Actions menu.

The Add Availability window will open. Select the days of week, time period, and duration of your availability.

Next, select the appropriate type of availability. Availability for "Appointments" allows students to initiate scheduling an appointment, while "Campaigns" availability is applicable if and when a faculty member initiates the scheduling process with a student by sending an appointment request.

Now select your Care Unit from the drop-down. This will determine which location and services the availability will be for.

After selecting the Care Unit, select a Location. Then select which student services you can provide to students during this availability.

If any Service you select is tied to a Course, a Course menu will appear and you will need to select the Course you are available for.

Click the **Save** button.

Repeat this process until all of your availabilities have been defined. You can have as many availabilities as needed.

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Questions to Consider

- Which faculty users already allow students to schedule meetings?
- How are faculty scheduling meetings with students (e.g. Outlook, Doodle, etc.)?
- Are there any points of integration between Navigate and the current process(es) faculty are using to schedule appointments with students?
- Do we expect faculty to leave notes or appointment summary reports after their meetings with students?

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Level 4 Training

Strategic Presentations and Workshops

Questions to Consider

- Which faculty, colleges, or departments have articulated Student Success goals?
- Which faculty, colleges, or departments use Navigate features regularly (even if cyclical).
- Which faculty, colleges, or departments are skeptical of the value of Navigate for supporting their Student Success goals?
- Are there any Deans or Chairs that are data-driven in their Student Success initiatives?
- Are there workflows, policies, or practices that should be iterated upon?
- What narrative

For examples of Strategic Presentations & Workshops that may be facilitated by your Strategic Leader, ***see page 25 of the Toolkit***

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Level 5 Training

Navigate Analytics for Deans and Chairs

Questions to Consider

- Are there any Deans or Chairs that are data-driven in their Student Success initiatives?
- Do any deans or chairs already partner closely with college advisors?
- What are Deans and Chairs required to report in an annual review process?

Assessing the Impact of Your Student Success Initiatives

Analytical Tools Assess the Impact of Interventions on Defined Student Cohorts

Built to be a **retrospective** tool for learning about the outcomes of interventions and initiatives you have already completed, or of which you have completed a phase, Intervention Effectiveness allows you to **analyze** and **compare** the progress and performance of **student cohorts** over time to assess the impact of interventions within and beyond the Navigate platform.

One Population, One Time Period

Create a "watchlist" of students marked as at-risk via progress report campaigns and evaluate their persistence and GPA outcomes

15 to Finish Campaigns – determine the average credits earned and attempted by your selected population the term before the intervention, the term of the intervention, and the term afterward

Two Populations, One Time Period

Evaluate the persistence outcomes of students who were marked as at-risk, one group of whom attended a campaign appointment, and the other group who did not attend a campaign appointment

Persistence by Campaign Appointment Attendance – determine whether students who completed a campaign appointment registered for the next term at a higher rate than students sent the campaign who did not schedule an appointment

Two Populations, Two Time Periods

Evaluate the persistence outcomes to the following term of TRIO students marked as at-risk in Fall 2016 compared to TRIO students marked as at-risk in Fall 2017

Change in GPA for Freshman English Majors due to Supplemental Instruction – compare outcomes for a group of students to a historical population you believe to be comparable by examining GPA trends for two groups of students across the selected time periods

*Optional data are subject to maintain availability and formatting

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Grand View University

Location:	Des Moines, Iowa
Size:	1,788 Undergraduates
Carnegie Classification:	Baccalaureate Colleges: Diverse Fields
Full-Time Retention:	67%
6-Year Graduation:	50%
Joined Navigate:	Late Fall 2016

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Tailored Trainings for Different 'Types' of Users

For Frequent Student-Facing Users, Training Builds from Basic to Advanced

For Regular, Student-Facing Users

Basic Training

- Student Overview & Progress tabs
- Communication & student messaging
- Issuing alerts & progress reports
- Setting up availability & calendar sync

Intermediate Training

- Notes & advising summaries
- Appointment campaigns
- "Schedule advising appointment" feature
- Case management
- Advisor development

Administrative Training

- Advanced search
- Institution Reports
- Population Health Dashboard

New in Fall 2018:
Advanced Training

- More on advanced search
- Understanding and using the predictive model
- Success markers
- Using major explorer

For Sporadic Users

Quick-Start Training

- Introduction to Navigate and goals
- Student information page
- Issuing an alert

GRAND VIEW UNIVERSITY

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Faculty Champion is Key to Success

Acts as a Leader

- Served on the Navigate leadership team since the beginning
- Chairs the Training and Development Team

Provides the Faculty Perspective

- Offers feedback on how faculty would react to possible changes and ideas
- Personalizes training with scenarios an advisor actually experiences

Translates for Faculty Advisors

- Speaks to other faculty advisors in their own language about how Navigate can make the work they ALREADY do more efficient

Marketing Navigate to Users Across Campus

Weekly Newsletter Shares Helpful Tips and Reminders

Faculty champion sends **weekly Navigate tips** to all faculty, staff, and advisors

Advertises upcoming Navigate **training sessions**

Offers insightful tips for **efficiently using Navigate**

Shares important dates for **coordinated Navigate campaigns**

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Faculty Engagement: Next Steps

Gathering Your Feedback

- Are we missing any **faculty training topics** that would be helpful for your school?
- Have you developed **practice exercises or other collateral** that you would be willing to share? Post them in the Administration and Training Section in the Help Center >> Community!

Incentivizing Ongoing Faculty Engagement

- For optimal faculty engagement, each institution must have a tailored strategy to **motivate and incentivize faculty end users** to engage with the Navigate project and platform.
- While these topics are not the focus of this Faculty Training Toolkit, they are undoubtedly relevant and are areas for further exploration.

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- Please take a minute to provide your thoughts on the presentation.

THANK YOU!

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