



APS

Virtual Summit

Assessing the Outcomes of Your Strategic Initiatives with APS

Course and Section Planning

Your Facilitators



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- 1 Zoom Features & Participation
- 2 Plan, Act, Evaluate
- 3 Framework for Success
- 4 Evaluating Efficiency and Iterating

Update Your Name on Zoom

To facilitate discussion,
please add your institution
name!

*Example: Brian Parady, EAB
Univ*

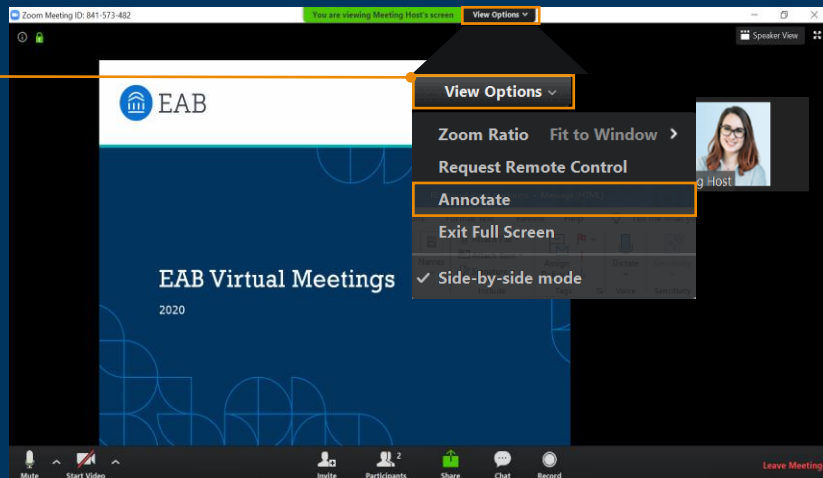
The screenshot shows a Zoom meeting window with a presentation slide titled "EAB Virtual Meetings 2020". The slide features the EAB logo. In the bottom right corner, there is a small video thumbnail of a participant named "Test Participant". The Zoom control bar at the bottom includes buttons for Mute, Stop Video, Invite, Participants (with a '2' icon), Share, Chat, Record, and Leave Meeting. The Participants menu is open on the right side, showing a list of participants: "Test Participant (Me)" and "Meeting Host (Host)". The "Rename" button is highlighted in blue. A "Rename" dialog box is open over the "Test Participant (Me)" entry, with the text "Enter a new screen name:" and the input field containing "Jane Doe - Institution".

Update your name and
add your institution

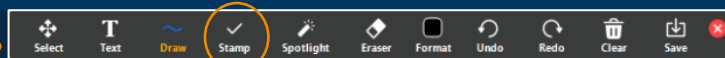
Open Participants menu

How to Use the Annotate Feature in Zoom

Step 1: View Options, then Annotate.



Step 2: Panel with different options for annotation. Please select Stamp.



Why is Evaluating Outcomes So Important?

To Name a Few Reasons...



For You

- Make the case for resources, whether continuing or additional
- Self-assess to understand what is working and what is not
- Deploy your resources where they will be most effective
- Celebrate your successes more broadly
- Share your story to help other institutions



For Us

- Prove the need for expanded capabilities in highly impactful areas
- Better understand the impact of our recommended practices
- Inform our staff of where you need different types of support
- Share greater diversity of stories broadly to help our partnership
- Continue expanding our offerings and partnership

And Ultimately to Provide a Return on Investment (ROI)

A Simple Equation with Complex Variables

At its Core, Success Means Outcome > Input



Inputs Are Typically Easy to Define...

- Cost of new Technology
- Changes to infrastructure
- Cost of new employees
- Work hours by existing employees
- Time to implement product or policy change

...But Outcomes Are Often Obscure

- "Process improvement"
- Increased faculty support or confidence
- Simplified evaluation process
- Removed barriers
- Improved transparency





Plan, Act, Evaluate

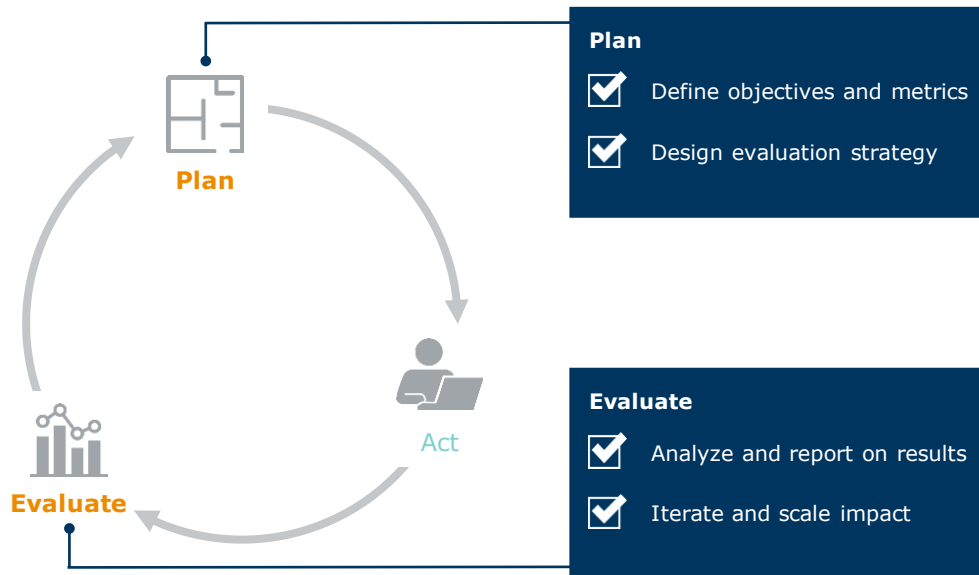
Setting the Stage for Success



A Useful Framework for Analyzing Impact

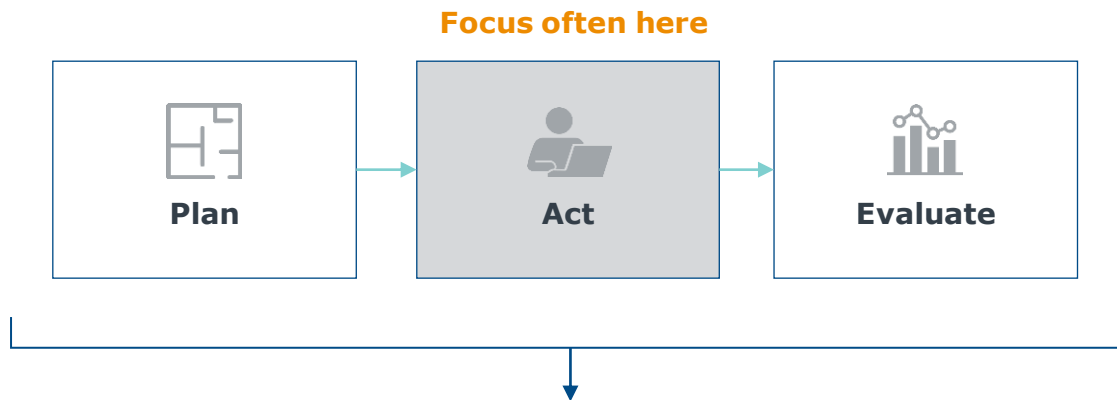
Focus on These Steps Annually to Hardwire Evaluation Into Your Approach

Sustain Momentum Through Ongoing Evaluation



Why Does Quantifying Impact Remain So Hard?

More Focus Needed in Planning and Evaluation



Leading to Common Challenges

- Work does not align with institutional goals
- Data not collected to allow for easy evaluation
- Purpose not clear, leading to “analysis paralysis”
- Potentially ineffective practices continue to be implemented
- Several initiatives happening at once, impact of each unknown

At Which Stage Is Your Institution?

Embedding Data Use in Your Course Planning Process

Using the Annotate feature, please a stamp in the appropriate row below.

Statement	Place Your Stamp in This Column!
<p>We have yet to start improving our course planning process.</p> <p>Plan</p>	
<p>We are currently in the process of improving and embedding data into our course planning process.</p> <p>Act</p>	
<p>We have already completed a review and enhancement of our course planning process.</p> <p>Evaluate</p>	



Framework for Success

Planning for and Measuring Success

Plan: Define Your Objectives & Metrics

Establishing a Clear Goal and a Method of Evaluating Your Goal



Set Goals for Your Initiatives

What is the primary goal in updating your course planning process?



- What are the significant milestones in attaining this goal?
- Which strategies are you going to employ to reach these milestones?
- Which additional goals are you pursuing with this initiative?



Define Evaluation Metrics

How will you measure your primary goal?



- Which supporting metrics, if any, contribute to this goal?
- Do these metrics also contribute to any secondary objectives?

Who Are the Primary Stakeholders?

Who is responsible for outlining the goal(s) of this initiative?



Faculty Senate



Provost/President

Who Is Participating in This Initiative?

What are their responsibilities?



Vice Provost(s)



Deans and Department Chairs

3 Early Steps to Improve Evaluation

Suggestions for Defining Objectives and Metrics



Snapshot Data

- Identify any data you'll need to snapshot *before* starting your initiative.
- If possible, keep a record of the current process with as much detail as possible.
 - › How long does it take to approve next semester's schedule?
 - › How many individuals are involved in this process?



Send a Survey to Participants

- Consider sending a survey about the current process prior to this initiative. Record current faculty sentiments and their impressions of the status quo.
- Repeat the same survey after completing the initiative to measure changes in faculty opinion.



Define Subjective and Qualitative Goals

- Try to outline vague goals or evaluation criteria as specifically as possible.
 - › Instead of "simplify capacity planning process" consider framing your goal as "decrease time to set the schedule" or "cut number of sections with fewer than 10 students by 50%."

Sample Survey – Course Planning Process



	Strongly Disagree	Disagree	No Opinion	Agree	Strongly Agree
The section and capacity planning process is consistent across the all departments.	1	2	3	4	5
Our section planning process relies on the appropriate data sets to determine need.	1	2	3	4	5
The capacity planning process is transparent and I can contextualize the needs of my department with broader institutional needs.	1	2	3	4	5
It takes too much time to decide on the next semester's schedule.	1	2	3	4	5
We have too many courses that are empty/full.	1	2	3	4	5
I am happy with our current course and section planning process.	1	2	3	4	5

Worksheet & Discussion

Take 5 minutes to complete the first page of the digital worksheet provided in the Chat box. For your future initiatives on campus we suggest filling out the “Plan” portion.

Executive Summary - Plan

Summarize the following activities in a brief paragraph for a strategic planning for a strategic initiative for evaluating the impact.

Summary of Key Definitions

1
Define Primary and Secondary Objectives

- What is the primary goal you want to achieve?
- What are the significant related goals?
- Which strategies are you going to use to achieve these goals?
- Which additional goals, if any, do you want to achieve?

2
Define Metrics for Success

- How do you intend to measure success?
- Which supporting metrics will you use to measure success?
- Do any of these metrics also serve as leading indicators?

3
Define Key Stakeholders and Participants

- Who are the primary stakeholders and participants in this initiative?
- Who are the primary participants in this initiative?

4
Evaluate & Iterate

- Once your initiative is formally approved, how will you evaluate its progress and impact?
- How will you iterate on the initiative based on feedback and data?

Strategic Initiative Evaluation Plan

Strategic Initiative (i.e., updating faculty line request process, revising course scheduling, etc.)

Objectives and Metrics

Goals What are you trying to achieve?	Metrics How will you measure success?
<p>Primary Objective</p> <p>→</p>	
<p>Secondary Objective</p> <p>→</p>	
<p>Milestones</p> <p>→</p>	

Stakeholders and Participants

Who are the stakeholders responsible for setting a timeline and providing oversight and direction for this initiative?	Who will be participating in this initiative and what are their responsibilities?

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► Plan

Establishing Key Definitions for Success

- Define your institutional goals
- Define your metrics for evaluation
- Identify all stakeholders and participants

Please Place Responses in the Chat!

- 1 What is/was your primary objective in enhancing your course planning process?
- 2 Which outcome metric(s) are the most relevant for measuring this objective?

Act: Stay Focused

Goal-Oriented Transparency

Share goals and resources openly with those involved in each stage of the process. This transparency will allow each participant to focus their efforts toward the next significant milestone in the project.



Occasionally strategic initiatives may have unforeseen benefits or unexpected barriers to success. Don't act with blinders on but routinely assess if your current efforts are on track or have strayed from your original intent.



"Our data keeping practices need to be updated. Can we afford to put our new process on hold while we assess and standardize our new policies?"

Questions to ask about barriers:

- Will this prohibit us from completing the initiative or can we improve this in the future?
- How long will it take to improve this?
- How much will it cost to improve this?

Questions to ask about mission

- Are we still directing our full attention toward our end goal?
- Are we on track to hit each milestone on time?
- Can we adjust our plan to reach our goal faster?



Not all deviation is bad – It may be beneficial to add two extra weeks onto the project if it will ensure all departments can benefit equally from a revised process. Meet with stakeholders and participants routinely to answer these questions and understand the implications of any potential changes.

Evaluation: Measure Outcomes

Keep These Steps in Mind As You Evaluate Your Initiatives

1

List Outcomes and Compare Them to Stated Goals

- Draft a comprehensive list of all outcomes from this initiative. Are these results in line with your plan?
- How do your intended results compare to your plan? Did the new process knock it out of the park or just barely meet expectations?
- Are there any unintended benefits from this initiative?

3

Compare Quantitative Data to Snapshot

- Compare any "hard data" to snapshots prior to this initiative.
- Last fall's scheduling process took 3 months, 2 meetings per department and our median fill rate was 67%. This year took 6 weeks and our fill rate increased to 85%.

2

Repeat Participant Surveys & Measure Qualitative Goals

- Repeat the same survey you completed prior to this initiative to gauge participant and stakeholder response.
- Department Chairs rated our original process as a 3.5 overall, noting that the process was only a 3.0 for transparency and a 2.0 on consistency. The new process was rated 4.2 overall with transparency at 4 and consistency at 3.5.

4

Determine a Relative Value of Outcomes

- Return to your list of outcomes and attempt to "rank" all results against one another.
- It is more important that chairs improved their opinion of this process than us saving 2 weeks of evaluation.



Evaluating Efficiency and Iterating

Ensuring continued success



Rinse and Repeat

Lessons Learned and Enhancing Efficiency

Up-Front Investment Is Necessary for Sustained Success

Often, the initial outcomes of a strategic initiative are lower than expected in the first iteration while the initial input is higher.

Iteration is Key!

- > *Which inputs or costs are recurring and what new resources can be reused?*
- > *Which outcomes from this process could be repeated?*
- > *Can these results be applied to new departments?*
- > *Can we enhance these outcomes with additional process improvements?*

Considerations for Iteration

Reduce Input, Maximize Output

Inputs

- Time to implement technology
- Time to discuss new process
- Cost to maintain technology



Example Outputs

- Reduced time-to-decision by 2 weeks
- Reviewed 30% more requests
- Improved faculty satisfaction by 3 percentage points

How Successful Was Your Initiative?

Your initiative's success depends heavily on your goals and expectations, as well as your institution's strategic priorities and campus culture.

- ▶ *Example: Reducing the median class size from 20 students to 18 may be worth \$4M to one institution facing state mandates, while another institution may not view this with the same priority due to budgetary constraints.*

However, it is important to consider the **long-term impacts** of your strategic initiatives and the **potential benefits** of an enhanced, replicable process.

Any Questions?



Please use the Chat feature if you have any questions or comments. If we aren't able to answer your question in today's session, your APS Strategic Leader will follow up with you after Summit.



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