

APS

Summit Series

Welcome!





Rich Staley

Vice President, Technology Partner Success



Simone Williams

*Director, APS and Edify Partner Services
& APS Virtual Summit Series Emcee*

A Collaborative of Mission-Oriented Institutions

3



APS Virtual Summit Series Agenda

Four-Part Series

1

SESSION 1

Friday, September 17

- **1:00-2:00 pm ET**

Lessons Learned from Annual Unit Health Check-Ups 1.0: Bridging People, Process, and Technology to Achieve Transformation

Presented by David Bebevino, Senior Director – Technology Partner Experience

- **2:00-2:30 pm ET**

Optional: Inside Navigate: Dynamic Self-Service Guidance and Academic Planning Tools to Foster Student Success at Scale

Presented by Matthew Ingram, Director – Partner Development and William Harmon, Director – Partner Development

2

SESSION 2

Thursday, September 23

- **1:00-2:00 pm ET**

Presentation with Middle Tennessee State University: Hardwiring Data into Academic Resource Decision-Making and Generating Buy-In to Support Institutional Goals

Moderated by Taylor Holubar, Edify and APS Consultant

Featuring Dr. Brian Hinote, Associate Vice Provost for Data Analytics & Student Success and Rebecca Cole, Associate Provost for Academic Administration and Resources

- **2:00-2:30 pm ET**

Optional: Shaping the Future of the Academy with EAB's Strategic Advisory Services

Presented by Jenn Latino, Senior Director - Strategy & Planning, Research Advisory Services

APS Virtual Summit Series Agenda Continued

Four-Part Series

3

SESSION 3

Friday, October 1

Peer-to-Peer Networking and Insight Sharing to Bolster Data-Informed Decision-Making at Your Institution

Large Topic-Based Groups:

- > Launching annual unit health check-ups (ft. Rilie Sibold, Academic Planning and Budget Officer at Washburn University)
- > Creating a support infrastructure (ft. Josephine Rodriguez, Director of Assessment at Western New England University)
- > Building trust in the data (ft. Dr. Louis Slimak, Assistant Provost for Curriculum and Assessment at West Virginia University)

4

SESSION 4

Thursday, October 7

Action Planning Workshops: Launching Annual Unit Health Check-Ups or Creating a Support Infrastructure

Large Topic-Based Groups:

- > Launching an annual unit health check-up
- > Creating a support infrastructure

Two Core Themes Threaded Throughout This Year's Series

6



Annual Unit Health Check-Ups

Create a new or iterate on your institution's process to better understand academic resource use, resource needs, and opportunities to support growing programs using data.

Support Infrastructure for Your APS Users

Empower your users and scale the time of your internal experts to broaden APS data use and data-informed decision-making.



Attend All Four Sessions and Be Entered Into a Raffle!



Individuals who attend all four sessions in the series will be entered into a raffle to win an **EAB Swag Basket** courtesy of Eabert, EAB's mascot!

“I Spy Eabert” Challenge

Post in the Chat When You Spot Him!

Throughout the APS Virtual Summit Series, you’ll see our friendly mascot Eabert pop up on your screen.

When he does, be the first to comment “I spy Eabert” in the Chat to win prize!

Note: Your comment must appear to Everyone, not just Panelists.



Audio Mute/Unmute and Video Stop/Start

The screenshot shows a Zoom virtual session interface. At the top, the EAB logo is displayed. Below it, the text "EAB Virtual Session" is shown. The main content area is a dark blue background with a pattern of overlapping circles. In the bottom right corner, the text "EAB" is visible.

Two callout boxes provide instructions:

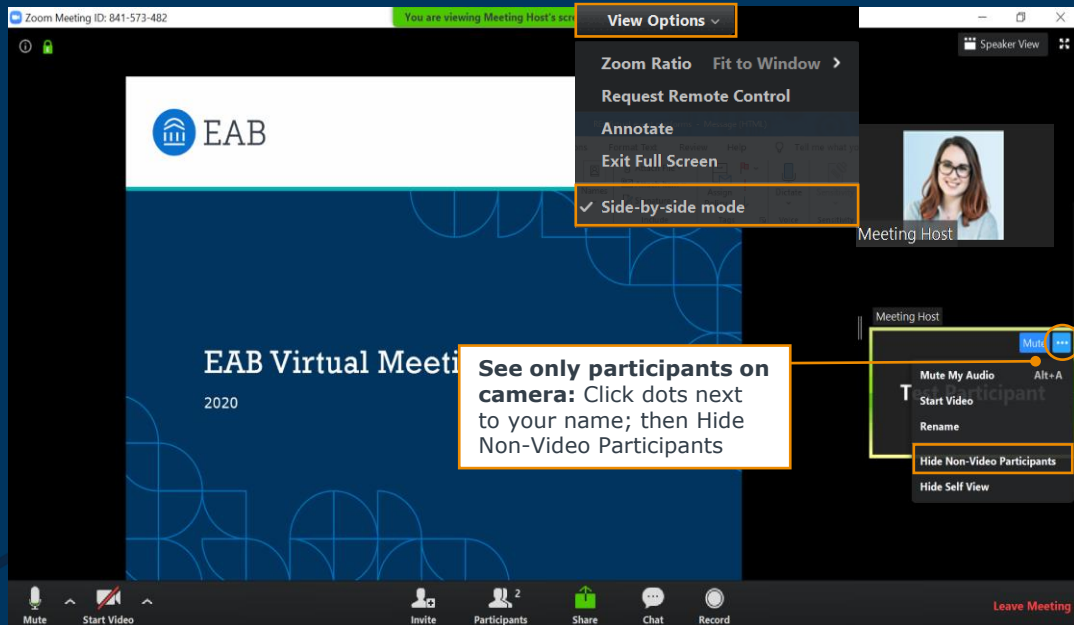
- Left Callout:** "Red slashes mean your microphone is muted and your camera is off". It points to the "Unmute" button, which has a red slash over the microphone icon.
- Right Callout:** "Access audio and video options by clicking the up arrow next to the Mic and Camera icon". It points to the up arrow next to the "Start Video" button, which has a red slash over the camera icon.

The bottom toolbar contains the following buttons from left to right:

- Mute (with a red slash over the microphone icon)
- Stop Video (with a red slash over the camera icon)
- Invite
- Participants (with a count of 3)
- Share
- Chat
- Record
- Leave Meeting (in red text)

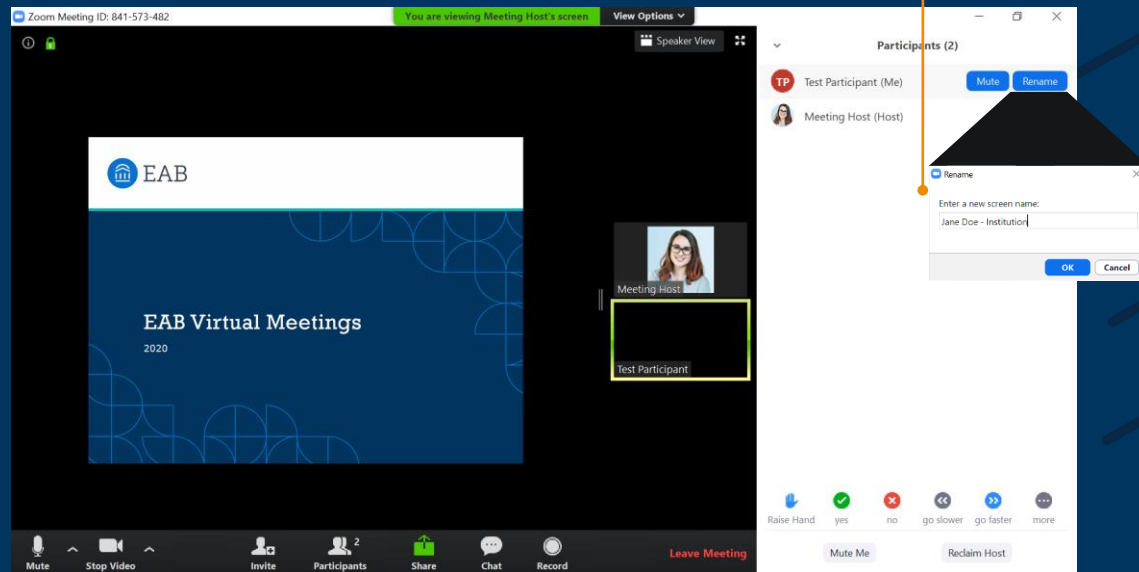
Suggested Zoom View

Enable side-by-side viewing of video and slides: View Options, then side-by-side mode



See only participants on camera: Click dots next to your name; then Hide Non-Video Participants

Update Your Name



Chat and Nonverbal Feedback

Use icons to communicate answers and signals to presenter

The screenshot displays a Zoom meeting window. The main screen shows a presentation slide with the EAB logo and the text 'EAB Virtual Meetings 2020'. On the right side, there is a 'Participants' panel showing two participants: 'Test Participant (Me)' and 'Meeting Host (Host)'. Below the participants list are icons for 'Raise Hand', 'yes', 'no', 'go slower', 'go faster', and 'more'. There are also buttons for 'Unmute Me' and 'Reclaim Host'. At the bottom of the Zoom window, there is a toolbar with icons for 'Mute', 'Stop Video', 'Invite', 'Participants' (highlighted with a red box), 'Share', 'Chat' (highlighted with a red box), 'Record', and 'Leave Meeting'. A 'Zoom Group Chat' window is open on the right, showing a list of participants and a text input field for sending messages. The 'To:' dropdown is set to 'Everyone'.

Open Participants and Chat

Select whether you want to chat with everyone or a specific person

Let's Try the **Chat!**

Enter your response in the Chat:

What book or podcast (does not have to be higher ed related) do you recommend?



David Bevevino

Senior Director, Technology Partner Experience



APS

Summit Series



Lessons Learned from Annual Unit Health Check-Ups 1.0

Bridging People, Process, and Technology to Achieve Transformation



1

Elephant in the Room: Did the Pandemic Disrupt Your Annual Unit Health Check-Ups? How so?

2

Revisit the Why and the What of Effective Annual Health Check-Ups with Insight about What You Learned During the Pandemic

3

Lessons Learned Over the Past Few Years of Annual Health Check-Ups

4

Primary Focus on How to Support Department Chairs and Preparers of Annual Health Check-Up Reports

Worksheet Available in the Chat

Record Notes Throughout Today's Session

APS
Summit Series

SEPTEMBER 17
SEPTEMBER 25
OCTOBER 1
OCTOBER 7

Session 1 | Friday, September 17

This worksheet is designed to help you record notes throughout the session. It includes a header with the APS logo and dates, and a main content area with two sections: 'If your institution does not have an annual health check-up process in place:' and 'If your institution has an annual health check-up process in place:'. The first section contains three numbered questions with corresponding text boxes for answers. The second section contains three numbered questions with corresponding text boxes for answers. The worksheet is designed to help institutions record notes throughout the session.

Lessons Learned
Bridging People.

If your institution does not have an annual health check-up process in place:

- Who on your campus do you need to connect with to get this process started?
- When would you like to implement this process to align with your academic decision-making calendar?
- What priorities do you want to inform with the metrics selected from the APS platform and other data sources for your template?

If your institution has an annual health check-up process in place:

- Have you adopted the lessons learned from the APS platform?
- Have you implemented a holistic approach to your health check-up process?
- Based on what you have learned from the APS platform, what steps will you take to improve your process?

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- Use the first page if your institution **has** an annual health check-up process in place.
- Use the second page if your institution **does not have** an annual health check-up process in place.

Quick Poll

Which statement best reflects your experience?

My institution has implemented and fully rolled out an annual health check-up process to:

- a) All departments
- b) Few departments
- c) More than half of departments
- d) None

Quick Poll

Which statement best reflects your experience?

My institution had to simplify or delay its annual health check- up process during the COVID-19 pandemic year(s) of 2020-2021.

- a) Yes, we simplified or delayed it.
- b) No, we proceeded as usual.

1

Elephant in the Room: Did the Pandemic Disrupt Your Annual Unit Health Check-Ups? How so?

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Revisit the Why and the What of Effective Annual Health Check-Ups with Insight about What You Learned During the Pandemic

3

Lessons Learned Over the Past Few Years of Annual Health Check-Ups: Deep Dive on How to Support Department Chairs and Preparers of Annual Health Check-Up Reports

Why Program Portfolio Management Is Hard

21

What Could Prevent You from Achieving Your Desired Outcomes?

Four Common Areas of Concern



The Data Problem

Our data is not comprehensive or precise enough to complete this kind of analysis



The Trust Issue

Our faculty don't trust anything we say and don't believe significant change is necessary



Zero Degrees of Freedom

Our hands are tied by the faculty handbook/ collective bargaining agreement/ system office

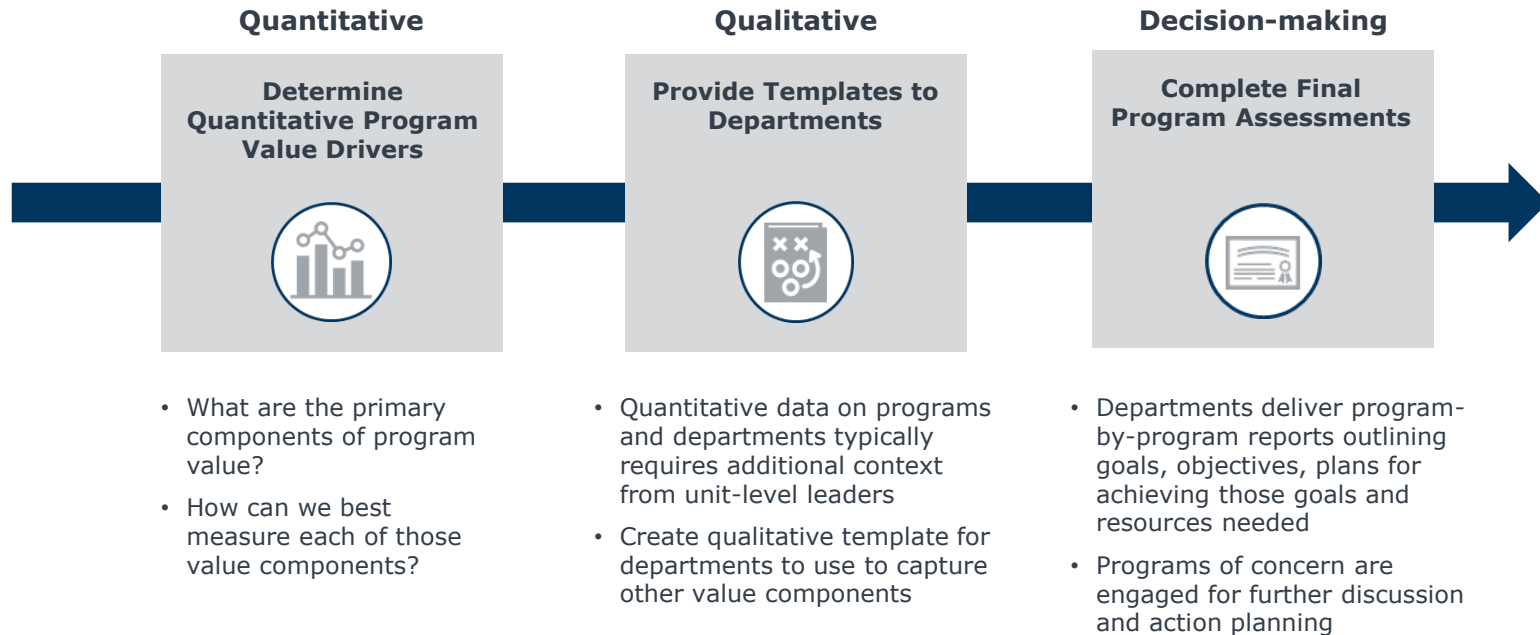


No Stone Left Unturned

We've already spent 5+ years cutting costs. I'm not convinced there's anything left to cut

A Better Program Assessment Process

Assessing Each Program's Contribution to Mission



Keep Strategic Priorities at the Forefront

Align Metrics Selected for Your Program Assessment Template to Institutional Goals

1

Cost Efficiency



Is the department...

...working to close its instructional capacity gap by maximizing instructional resources given course demand?

2

Enrollment Growth



...aligning course offerings with demand, especially by term?

3

Student Outcomes



...promoting student progress and providing support resources?

APS Metrics to Consider for Your Template

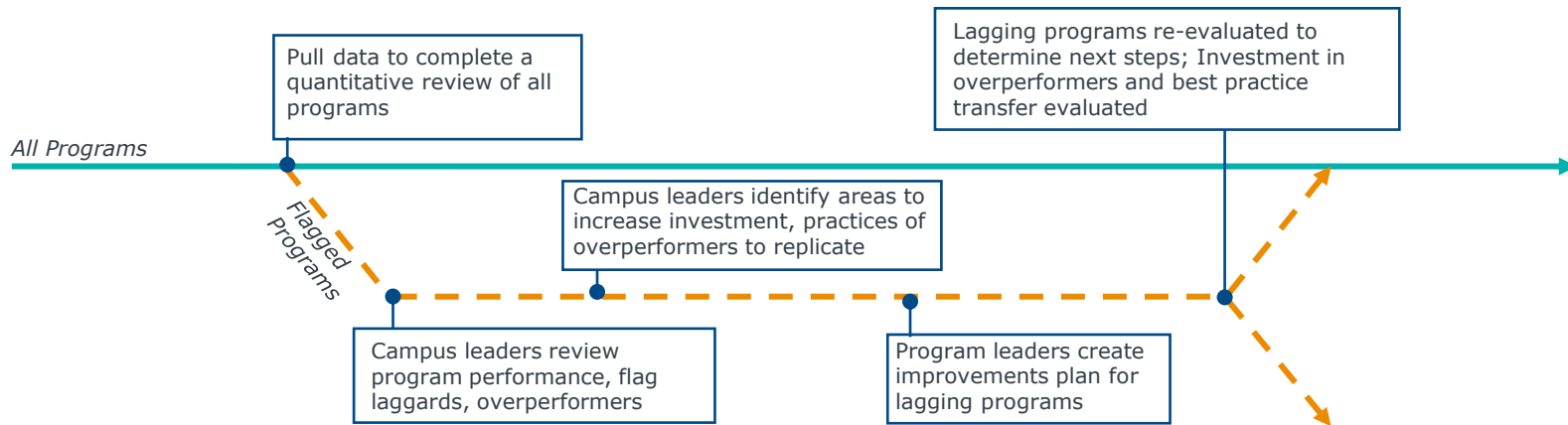
- 3-Year Growth in Attempted Student Credit Hours (SCH) by Department
- Intercurricular Dependencies
- Fall-to-Fall Program Retention
- Median Section Fill Rate
- Median Class Size Benchmark
- Instructional Staff Headcount
- Distribution of Sections, SCH Taught
- Trends in Cost per SCH
- Course Completion Rate
- Courses with Highest Unearned Credit Hours

Focusing Your Limited Time and Effort

24

Foster a Continuous Improvement Mindset With a Regular Review Cadence

Annual Unit Health Check-Up Process



Four Advantages of Annual Health Check-Ups

- 1 Make evaluation routine
- 2 Find problems early so that programs have time to improve
- 3 Create data-informed culture
- 4 Direct institutional resources to areas of greatest return

Closing Programs Not the Only Option

Revitalization Can Lead to Different Organizational End-States

End-State	Description	Example
Restructure	Rearrange programs to spark creativity and foster synergies across resources	Rochester Institute of Technology moved struggling programs to another college to create greater alignment with similar disciplines.
Merger	Combine programs into one to leverage scale	University of Wisconsin-Madison merged seven under-enrolled programs into tracks of a single master's degree.
Inter-campus Program	Share costs and distribute specialties across campuses	Bowling Green State University and University of Toledo combined unique foreign language specializations into a joint program.
Service Program	Retain minimum faculty contingent for electives and general ed requirements	Southern Oregon University kept faculty to teach art history courses as service courses after phasing out the major.
Sunset	Teach out all students; reassign or terminate faculty	Thompson Rivers University eliminated graphic design program; most faculty retired, and one moved into another department.

Source: Bowling Green State University, Bowling Green, OH; Rochester Institute of Technology, Rochester, NY; Southern Oregon University, Ashland, OR; Thompson Rivers University, Kamloops, BC; University of Toledo, Toledo, OH; University of Wisconsin-Madison, Madison, WI; EAB interviews and analysis.

Annual Health Check-Up Impact Across the Collaborative

A Sample of Partner Examples

Time Savings

700 hours

Reduction in manual data pulls and analysis annually
St. Ambrose University

180 hours

Saved in data pulls for one IR Analyst during academic program self-study process
John Carroll University

1 FTE

Worth of IR time saved annually
St. Xavier University

Effective Annual Reviews

100%

Of faculty line requests evaluated on same basic criteria
Eastern Washington University

5x

More departments reviewed annually, up to 100%
Dixie State University

50%

Programs reviewed by larger council were given specific action steps for first time
West Virginia University

Shared Governance in Action

60%

Of colleges used annual program review data to adjust staffing line requests
Washburn University

1st

Ever University Chairs meeting held to identify annual KPIs
Lewis University

114 Users

Involved in budgeting process used single source of data (APS platform)
Old Dominion University

The Pandemic's Effects on Annual Health Check-Ups

Taking a Moment to Reset

Reasons Why Annual Health Check-Ups Were Delayed Due to the Pandemic

- Too much disruption to proceed with a status quo process
- Data too inconsistent from previous years to conduct meaningful analyses on any program
- Staff resources reallocated to other areas in need
- Convolved costs from virtual investments, student withdrawals, and more

Opportunities to Reset

- **Analyze Course Success Rate by Instructional Mode:** Discern how students performed in online, in-person, and hybrid courses
- **Consider Instructional Workload by Instructional Mode:** Understand how instructors felt about and performed in new modalities to redistribute workload
- **Share More Best Practices in Qualitative Template Areas:** Identify departments that retained majors and share their practices with other departments

Enter Your Response in the Chat

Whether your institution has implemented annual health check-ups or not, what did you learn during the pandemic specifically about academic programs and the health of them?

How did your health check-up process change during the pandemic and as we emerge from it?

- Use the **Raise Hand feature** if you'd like to share with the group!



1

Elephant in the Room: Did the Pandemic Disrupt Your Annual Unit Health Check-Ups? How so?

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Revisit the Why and the What of Effective Annual Health Check-Ups with Insight about What You Learned During the Pandemic

3

Lessons Learned Over the Past Few Years of Annual Health Check-Ups

How Does Transformation Happen?

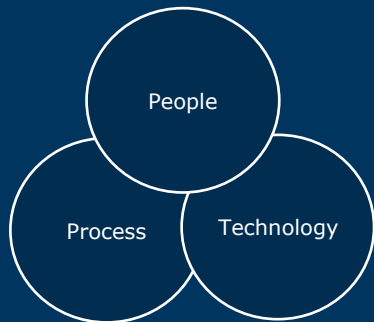
A simple but powerful formula

People + Process + Technology

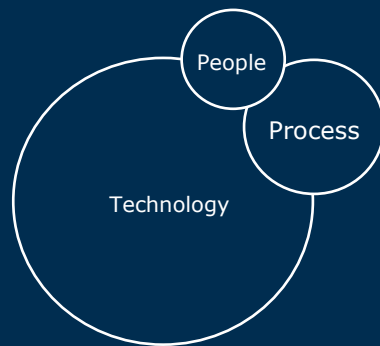
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Transformation

How it Should Look



How it Frequently Looks



Unintended Results from an Imperfect Balance



When Institutions Emphasize Technology Without Equal Focus on People and Process

Common Challenges



Local experts inundated with questions



Unclear expectations about new process



Misunderstanding about data use and intentions



Incomplete or poor-quality report submissions

Adjusting the Process to Build Context and Support

Full Understanding of Performance Plus and Smart Timing Reduces Conflict



Don't Rely Only on Quantitative Information

"Our program retention dropped 5% because we lost our best advisor. We're replacing her this year."

"Our cost per credit hour went up because one of our star faculty members went on sabbatical. We had to pay someone for an overload and an adjunct."



Tie Annual Health Checks to the Academic Year and Budget

Summer/early fall: Data collection and preparation

Mid-late fall: Reports due and flagged programs discussed

Spring: Planning and budgeting decisions



Include a Hold Harmless Period When Starting

Year one: Discussion of data questions and concerns

Year two: Small financial adjustments based on reports and plans

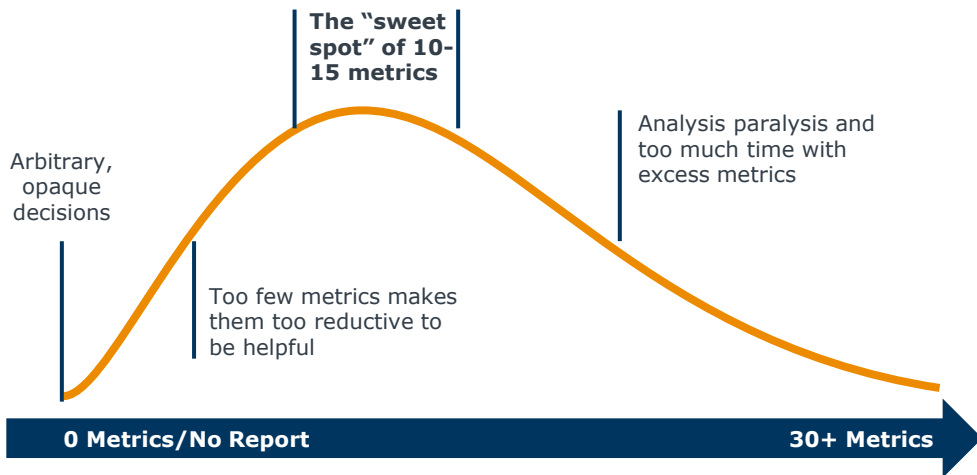
Year three: Full implementation and impact on programs after buy-in and understanding



Going to the Right Data Depth

Too Much Information Creates Confusion, Not More Precision

An Oversimplified Curve of Understanding



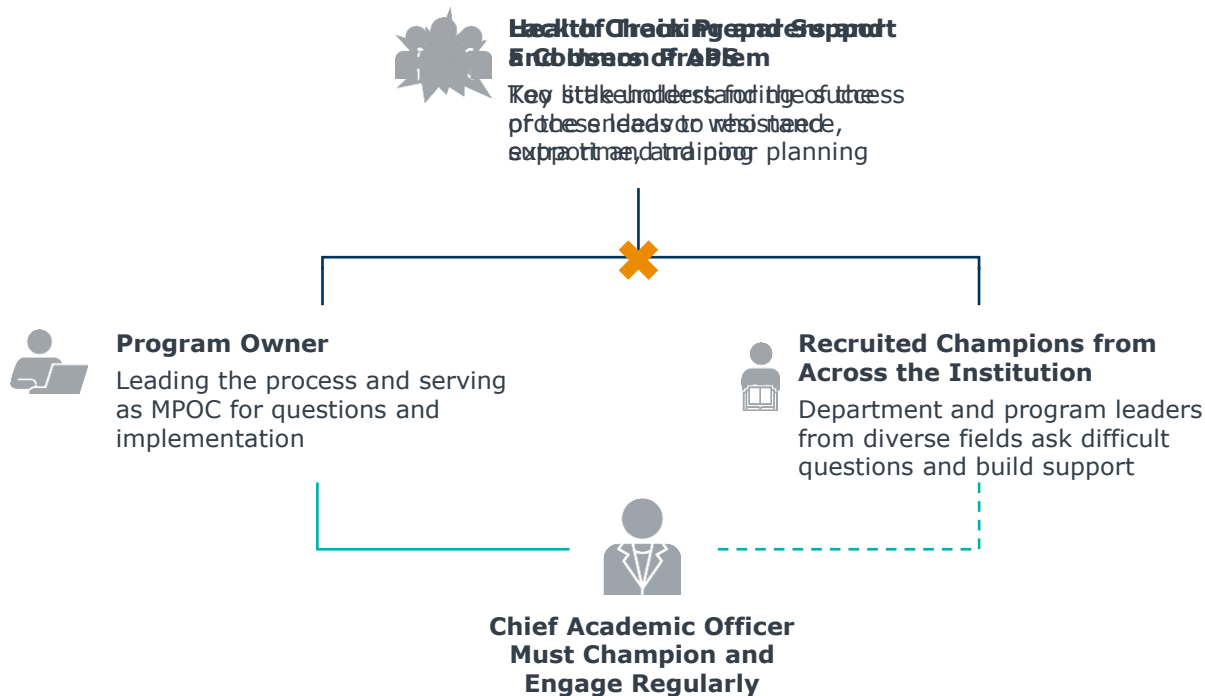
If you give a mouse a cookie...

"We started our process with too many choices for metrics and tried to incorporate as many nuances as we could while still preparing the reports for our program leaders. It honestly turned out to be unhelpful for everyone. They got confused by the process, and my team couldn't devote the time to making it work."

Provost, Regional Public University

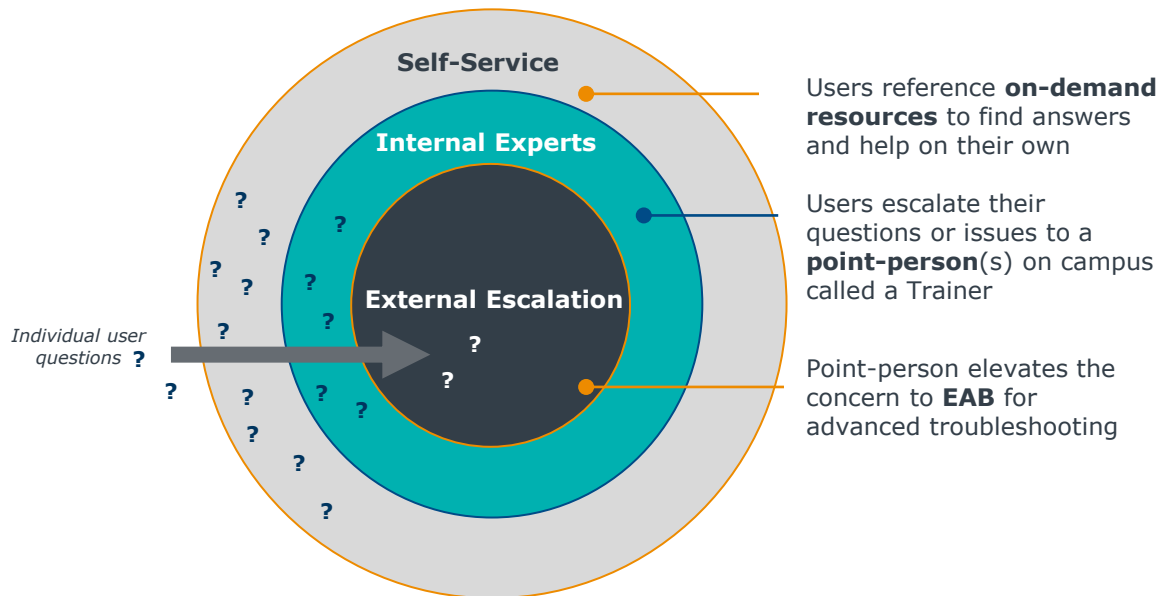
Senior Leadership, Inclusivity, and Training

Training for End Users Remains a Missing Piece for Many Annual Health Check-Ups



Create a Holistic Infrastructure to Support Your Users

Surrounding Users with Self-Service Resources and Internal Expertise



Multiple Training Channels to Support Users

Self-Service Resources and Internal Expert-Led Sessions

Self-Service Training

Resource Center: Help & Training Dashboard in the APS Platform: EAB provides training guides and other resources that we recommend you pare down and/or customize to share with APS users. Ensure that these documents are digestible and easily accessible.

Microsites: Institutional microsites are a great place to announce platform updates and store self-service resources, like FAQ docs.

Tip:

- *Include APS login information on your institution's microsite and note available resources*

Active Training

Platform Walk-Through:

Conduct formal walk-throughs of the platform. Ask department chairs, deans, and other users to attend, follow along, practice, and ask questions.

Office Hours: Host informal dedicated spaces (in-person or virtual) for users to ask questions and support each other's platform knowledge development.

Tips:

- *Plan these training sessions ahead of time to establish a regular cadence.*
- *Ensure you target relevant users and the planning process you have selected.*

Proactive Training

Onboarding New Users: Ensure that new APS users are familiar with APS as soon as they join your institution.

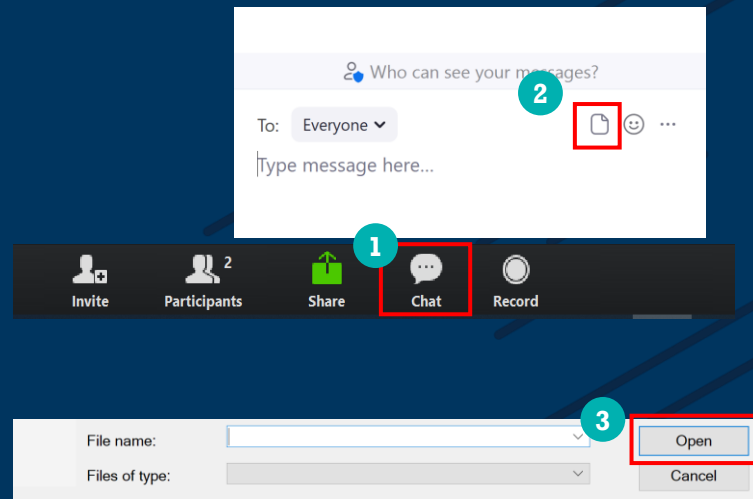
Persistent Training: Use standing meetings like department chair retreats, all-hands meetings, or roundtable discussions to share key functionality and success stories regarding APS data use.

Tips:

- *Encourage proficient users and champions to share wins by highlighting and rewarding their successes.*
- *Consider how APS can be part of ongoing conversations to achieve greater data-informed decision-making.*

Use the Chat! Enter Your Response and Upload Files

- Has your institution created self-service resources regarding annual health check-ups?
- Do you have example documents or links to share with the group?
If a file, please use the file icon in the Chat to upload it for everyone to see.



Make Self-Service Resources Easy to Access

Empowering Users with Information and Achieving Scale

Create a Microsite to House On-Demand Resources

- **Location:** Integrate the page into your institution's site, so users can easily access it.
- **Communication:** Inform users how to access the microsite, its purpose, and how to use it.
- **Expectations:** Set expectations that users should reference the online space before reaching out to the institution's point-person.
- **Iteration:** Update the online space regularly to reflect the institution's strategic priorities, projects, and other content as questions arise.

Bowling Green State University

BGSU Provoost and Senior Vice President for Academic and Student Affairs

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Academic Performance Solutions (APS)

Bowling Green State University - Provoost and Senior Vice President for Academic and Student Affairs

Institutional Effectiveness

Office of Institutional Effectiveness

APS Key Student Outcomes

APS Accreditation

Specialized Program Accreditation

Program Review

Academic Performance Solutions (APS)

State Authorization

Professional Learning

About APS

Office of Academic Assessment

Center for Faculty Excellence

Office of the Provost

120 McNeal Center
Bowling Green, Ohio 43403-0000
419-753-2910
provost@bgsu.edu

Academic Performance Solutions (APS)

Bowling Green State University - Provoost and Senior Vice President for Academic and Student Affairs

Academic Performance Solutions (APS) is a decision-support platform that brings our institution's student, HR and finance data into a single platform that generates structured reports and peer benchmarks that can be used to support metrics for our university goals. We partnered with APS because we lacked access to this type of data, which caused us to lose time, dollars, and other resources. APS is part of a wider effort to ensure that you have the data you need to make an informed decision. Tailored by another important piece of that effort.

We will use APS to build a data-informed culture. The data will inform decisions but will never tell us the right or wrong answer. It will begin using APS data for course planning, which will place everyone on equal footing to start the conversation, save you time in searching for and parsing about what kind of information to include and help us identify needs across the institution.

Current Projects

PeopleSoft/APS - Data Definitions Task Force Projects

PeopleSoft/APS - Data Quality Task Force Projects

APS Release Notes (Find under Help & Training)

FAQs

[Link to PDF](#)

[Link to FAQs page](#)

NIU Office of the Executive Vice President and Provost

About | Reporting Areas | Faculty and Staff Resources | Policies and Procedures

Google

Contact

Office of Executive Vice President and Provost
Alfred Hall 215
815-753-5889
815-753-4781 (fax)
provost@niu.edu

The EAB Academic Performance Solutions (APS) Platform

NIU has partnered with EAB to implement a platform, Academic Performance Solutions (APS). APS is a data analytics tool that brings our institution's student, HR and finance data into a single platform that generates structured reports and peer benchmarks that can be used to support metrics for our university goals. We partnered with APS because we lacked access to this type of data, which caused us to lose time, dollars, and other resources. APS is part of a wider effort to ensure that you have the data you need to make an informed decision. Tailored by another important piece of that effort.

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Using APS Data at a Campus-Wide Scope

Academic leaders are responsible for making critical resource decisions, such as faculty hiring, course planning and driving impactful change on campus. Yet, often lack the right or sufficient information to support decisions, balance a breadth of responsibilities (administrative, teaching, research, community engagement, etc.) and make decisions that support the success of your unit, college and NIU.

Putting Data Directly into the Hands of Leaders

Our goals in putting data directly into your hands are to:

- Minimize burden and improve efficiency: Ease of availability of data and consistent methodology reduces the time for manual data collection and analysis.
- Make once-difficult conversations easier: Access to the same data puts all academic leaders on the same ground, which places all conversations at the same starting point.
- Open the "Black Box" of decision making: Access to the same data allows everyone to understand what kind of information is used to inform decisions.
- Illuminate current resource use and opportunities: Comprehensive data helps leaders understand the state of their department or college, with the ultimate goal of supporting priorities, students and staff.

Access to the APS Tool

APS Updates and New Features

- Removal of fund 44 from the platform (December 2020)
- Visit the EAB website to see the latest advancements for APS.

Northern Illinois University

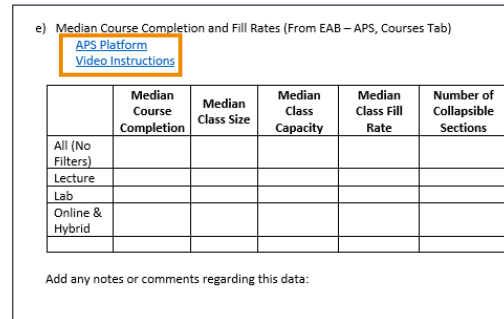
39

39

Customized Videos

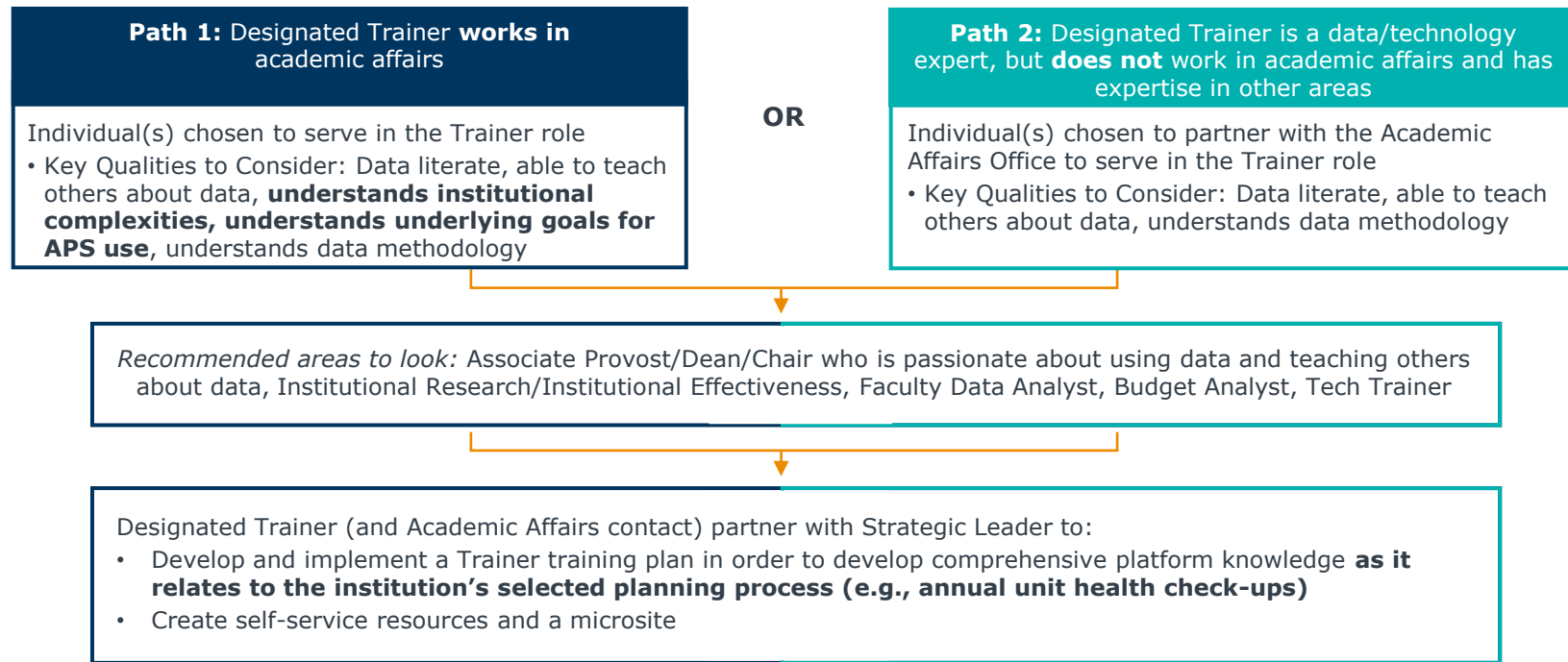


Step-by-step videos to accompany the guides, walking users through how to locate relevant metrics



Choose the “Trainer” Path That’s Right for You

Driving Cultural Buy-In from Within Your Institution



Prepare Your Trainer(s) to Teach Users and Answer Questions

Recommended Training Plan for Trainer

Trainer Plan Specifically for Institution's Annual Health Check-Up Process

Activity/Resource	Date	Desired Outcome
Introduction email or meeting		Introduce key messaging points for APS
Deep 1:1 review of the metrics involved in the APS training with SL		Understand APS metrics selected for your planning process template
User training outline		Create training plan to engage and train users
Teach-back/practice training session with SL		Ensure Trainer is comfortable
Self-study time		Deepen APS knowledge and comfort in the platform
Live user training session with SL on standby		Teach users how to use APS for your relevant planning process
Follow-up emails about process and deadlines		Ensure users understand requirements and deadlines.
Office hours		Answer user questions

Closing Questions for Consideration

Revisiting the Worksheet

If your institution has an annual health check-up process in place

- Have you adopted the lessons learned discussed today? If not, which ones resonated with you most?
- Have you implemented a holistic support infrastructure regarding this process? If not, what steps will you take to start?
- Based on what you have learned today, how will you adjust the amount or type of information you will request from department/program leaders in this process??

If your institution does not have an annual health check-up process in place

- Which individuals do you need to connect with to get this process started?
- When would you like to implement this to align with your academic decision-making calendar?
- What priorities do you want the metrics selected from APS and other data sources to inform in your template?



Maintain Momentum by Attending Additional APS Summit Sessions

A Four-Part Series Designed to Build on Insight Session to Session

Collective Sessions

1

Today

Laying the Groundwork for Successful Data-Informed Annual Health Check-Ups

- Today's session!

Large Topic-Based Groups

2

Thursday, September 23

Learning and Applying Inspiration from Peers

- Presentation with Middle Tennessee State University to learn about their annual health check-up process

3

Friday, October 1

Discussing Strategies, Challenges, and Ideas

- Three discussion groups with partner co-facilitators
- Launching annual unit health check-ups
 - Creating a support infrastructure
 - Building trust in the data

4

Thursday, October 7

Planning Your Next Steps to Drive Change

- Two groups
- Launching annual unit health check-ups
 - Creating a support infrastructure

Ask a Question

The screenshot shows the EAB Virtual Session interface. At the top left is the EAB logo, consisting of a blue circle with a white building icon and the text "EAB". Below the logo, the text "EAB Virtual Session" is displayed in white and teal. Three callout boxes with orange borders and lines pointing to the bottom toolbar provide instructions: "Use the Chat feature to send messages to all panelists or everyone" points to the Chat icon; "Click the hand icon to raise your hand" points to the Raise Hand icon; and "Use the Q&A feature to ask questions" points to the Q&A icon. The bottom toolbar is dark grey and contains the following elements from left to right: "Audio Settings" with an upward arrow, the Chat icon, the Raise Hand icon, the Q&A icon, and a red "Leave Meeting" button.

EAB

EAB Virtual Session

Use the Chat feature to send messages to all panelists or everyone

Click the hand icon to raise your hand

Use the Q&A feature to ask questions

Audio Settings ^

Chat Raise Hand Q&A

Leave Meeting



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