

# APS

## Summit Series

Welcome!

# APS Virtual Summit Series Agenda

## Four-Part Series Continues!

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 Thomas Fringer, Senior Director – Partner Development*

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### 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 co-facilitated by Rilie Sibold, Academic Planning and Budget Officer at Washburn University; Josephine Rodriguez, Director of Assessment at Western New England University; and Dr. Louis Slimak, Assistant Provost for Curriculum and Assessment at West Virginia University*

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### SESSION 4

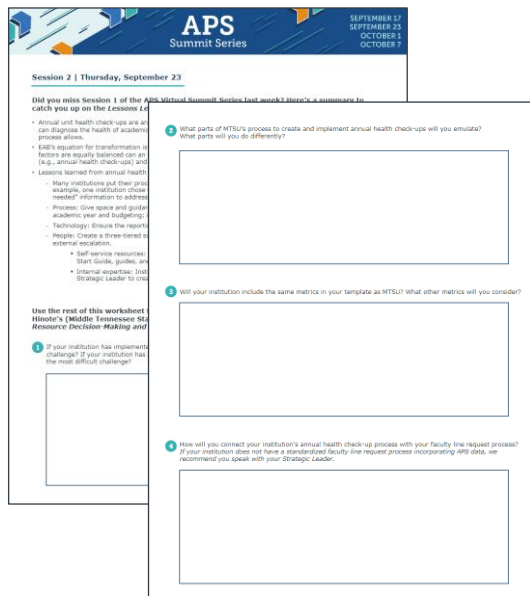
**Thursday, October 7**

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

*Large Topic-Based Groups*

# Download the Worksheet in the Chat!

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The worksheet is titled "APS Summit Series" and includes dates "SEPTEMBER 22", "SEPTEMBER 23", "OCTOBER 1", and "OCTOBER 2". It is for "Session 2 | Thursday, September 23".

**Did you miss Session 1 of the APS Virtual Summit Series last week? Here's a summary to catch you up on the Lessons Learned!**

- Annual unit health check-ups are an
- can diagnose the health of academic process allows
- Each institution for transformation is factors are equally balanced can an (e.g., annual health check-ups and
- Lessons learned from annual health
  - Many institutions put their own examples, one institution chose needed" information to address
  - Process: Give space and guide academic year and budgeting
  - Technology: Ensure the reports
  - People: Create a three-tiered external escalation
    - Self-service resources: Start Guide, guides, an
    - Internal expertise: Inst Strategic Leader to create

**Use the rest of this worksheet to answer the Middle Tennessee State Resource Decision-Making and**

**1** If your institution has implemented challenge? If your institution has the most difficult challenge?

**2** What parts of MTSU's process to create and implement annual health check-ups will you emulate? What parts will you do differently?

**3** Will your institution include the same metrics in your template as MTSU? What other metrics will you consider?

**4** How will you connect your institution's annual health check-up process with your faculty line request process? If your institution does not have a standardized faculty line request process incorporating APS data, we recommend you speak with your Strategic Leader.

Use the worksheet to record notes and ideas during Middle Tennessee State University's presentation!

*Miss last week's session? We recommend you review the summary at the top of the worksheet.*

## 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!

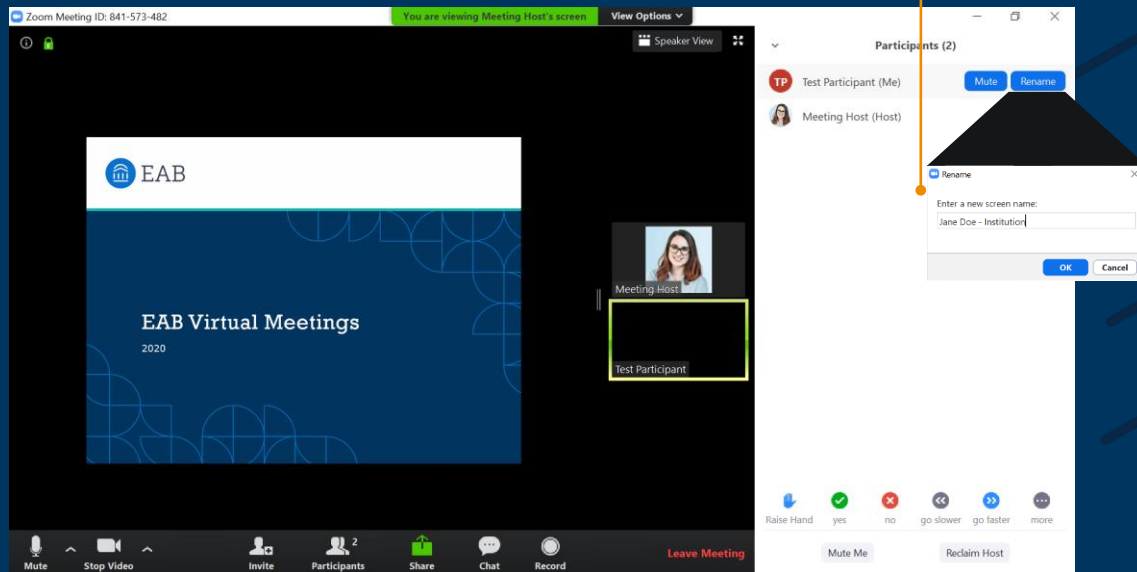
Throughout the APS Virtual Summit Series, you’ll see our friendly mascot Eabert pop up on your screen.

**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.



# Update Your Name



Update your name and  
add your institution

Open Participants menu



**Taylor Holubar, PhD**

*Associate Director, Edify  
and APS Partner Services*



# APS

## Summit Series



# Hardwiring Data into Academic Resource Decision-Making and Generating Buy-In to Support Institutional Goals

Presentation with Middle Tennessee State University





# Today's Presenters

Middle Tennessee State University



**Rebecca Cole**

*Associate Provost for Academic  
Administration and Resources*



**Brian Hinote, PhD**

*Professor and Associate Vice Provost  
for Data Analytics & Student Success*

# Engage in Today's Session!

The screenshot shows the EAB Virtual Session interface. At the top, the EAB logo is displayed. The main content area has a dark blue background with a geometric pattern. Below the title, three callout boxes with orange borders and lines pointing to icons in the bottom toolbar provide instructions:

- A callout box pointing to the Chat icon (two speech bubbles) says: "Use the Chat feature to submit comments".
- A callout box pointing to the Raise Hand icon (a hand) says: "Click the hand icon to raise your hand".
- A callout box pointing to the Q&A icon (a speech bubble with a question mark) says: "Use the Q&A feature to ask questions".

The bottom toolbar is dark grey and contains the following elements from left to right:

- "Audio Settings" with an upward arrow icon.
- The Chat icon (two speech bubbles).
- The Raise Hand icon (a hand).
- The Q&A icon (a speech bubble with a question mark).
- A red "Leave Meeting" button.

Enter Your Response in the **Chat!**

**How would you describe the stage your institution is regarding building out an annual unit health check-up process? Enter one word in the Chat.**

# About Middle Tennessee State University (MTSU)

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## Middle Tennessee State University

*Murfreesboro, TN*



- Public Research University
- Founded in 1911
- 21,913 student enrollment
- APS Collaborative partner since 2018



- Signature programs: Aerospace, Recording Industry
- Primary strategic priority: Student success
- Since 1911, MTSU has graduated more than 100,000 students
- Recently achieved record-high retention and persistence rates



# Lack of Standardization Served as Impetus for Launching New Process

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Annual Health Check-Up Process Provides Frequent and Formalized Glances Into Academic Health

## Lack of Standardized Data for Office of the Provost's Use



While the Office of the Provost collected numerous amounts of data, the data were not standardized in a way to effectively inform decision-making.



Standardized data in the annual health check-up process allow the Provost's Office to analyze, partition, and gather insights from the data to inform decisions.



## Lack of Standardized Approach Among Academic Stakeholders



Deans and department chairs pulled data from different sources, creating different narratives using the data points of their choice.



Standardized data points and packaging ensure academic stakeholders provide comparable narratives across the institution.

## Quick Poll

**If your institution has (or has not) implemented annual unit health check-ups, what do you think was (or will be) the most difficult challenge?**

- a) Lack of buy-in among key stakeholders
- b) Lack of data literacy
- c) Lack of prioritization
- d) Skepticism
- e) Other: If you're comfortable, please type into the Chat!

# Centrally Spearheaded the Annual Unit Health Check-Up Process

Bringing Data to Decisions in the Provost's Office



1

## Provost Mark Byrnes Led Vision Setting

- With goals in mind, MTSU's Provost set the vision for the new annual health check-up process
- Provost met with Becky and Brian, and tasked them with implementing the vision

2

## Created Plan for Creation and Implementation

- Becky and Brian, with the help of their APS Strategic Leader, collaborated to determine the timeline for this process (in relation to the entire academic year)
- Identified individuals to involve across campus



# Promoted Buy-In by Involving Deans and Chairs in Template Creation

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## Ensuring the Template Allowed for Reflection

3

### Created Template

- Selected metrics from the APS platform to include
  - Categories: Enrollment, Majors, Student Success, Capacity Utilization, Instructional Staff
- Created template in Excel

4

### Communicated with Deans and Department Chairs

- Prepared key talking points regarding the process, allowing Brian/Becky to proactively consider anticipated concerns
- Reiterated that this process is continuous, not a “one and done” like many assumed
- Used public venues, like the President’s Newsletter (internal) to announce process and goals

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### Collected Feedback and Made Iterations

- Shared and discussed template with Faculty Senate, Deans Council, and Chairs Council for review, bringing them into the process and ensuring they were bought in
- Made several iterations to incorporate feedback and ensure the template was as much a *reflective* document as it was a summary document



# Annual Health Check-Up Template

2020 Annual Department Review - Middle Tennessee State University				
Department:		Name:		
Program(s):		Date of Data Pull:		
College:				
Enrollments				
<i>APS Analytics, Department Scorecard tab. Filters: Time Period, University Attributes, Course Attributes.</i> <i>APS Benchmarks, Enrollment tab. Filters: Cohort, Time Period, University Attributes, Course Attributes.</i>				
# Students Enrolled	2019-20 Lower Division	2019-20 Upper Division	2019-20 Graduate	2019-20 All Divisions
Benchmark # Students Enrolled				
Enrollment 3 Year Trend				
Benchmark Enrollment 3 Year Trend				
Total Attempted SCH				
SCH 3 Year Trend				
Intercurricular Dependencies	2019-20	College 2019-20	Univ 2019-20	
% of SCH Taught to Own Majors				
% of SCH Taught to Service Majors				
Top Service Major Departments				
1				
2				
3				
4				
5				
Comments and Context:				

## Key Components

- Metrics: Enrollment, Majors, Student Success, Capacity Utilization, Instructional Staff
- Location of metrics in APS platform
- Filters applied
- Qualitative commentary
- Goals for upcoming year and accompanying action plans

# Empowered Deans and Chairs to Reflect and Act on the Data

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Minimizing the Lift on Leaders with Completed Templates and Formalizing Time for Discussion

6



## Completed Template for Each Department

- Using data from the APS platform and files from the Office of Student Success, Becky and Brian completed each department's template
- Sent the completed template and raw data to each dean and chair, asking them to review it before the meeting

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## Held 1:1 Department Meetings

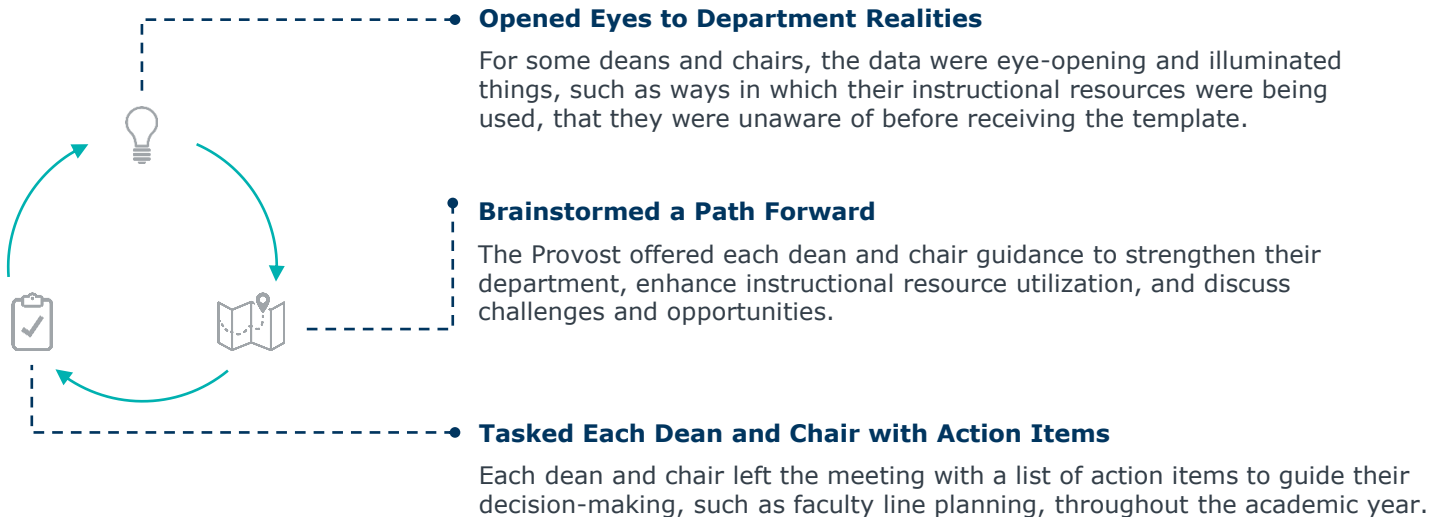
- Provost hosted meetings with every dean and chair
- Conversations were used to both celebrate department accomplishments and discuss opportunities that were surfaced from the data/qualitative commentary



# 1:1 Meetings Provided Valuable Face Time for Department Chairs

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Focusing Conversations on Driving Continuous Improvement and Supporting Goals



# A First-Time “Hold Harmless” Iteration to Promote Cultural Buy-In

## Learning from the Process and Incorporating Feedback to Ease the Cultural Shift

### Key Takeaways from MTSU’s First Annual Health Check-Up Process



#### 1 **Keep Medium and Long-Term Objectives Top of Mind**

Cultural shifts are not easy, and results don’t happen overnight. Be patient and allow for the process to grow and change.

#### 2 **Make a Plan and Stick to It (Within Reason)**

Things move fast. Make a plan from launch to communication to iteration, because you may not have time to think about it in the moment.

#### 3 **Iterate, Iterate, Iterate!**

This is not a one and done process. Formalize time to hear feedback from all relevant stakeholders, reflect on the process, and make changes to best fit your institution.

#### 4 **Prepare Your Talking Points**

Communicate that the process is here to stay, and the data are one piece of the story. You may face resistance but repeating your key points will reinforce your message.

#### 5 **Give Department Chairs Face Time**

Build in time for chairs and deans to engage with the Provost in 1:1 meetings, because they value and will benefit from the time.

#### 6 **Don’t Make This an Isolated Process**

Tie your annual health check-up process to a larger flow of decision-making throughout the academic year.

# Applying Lessons Learned to Faculty Line Request Process

Create Continuity by Tying Activities/Processes to Times in the Academic Year

## Annual Health Check-Ups Pave the Road for Faculty Line Request Process

*Occurred Spring 2021*

- Embedded opportunities to leverage APS data to inform decision-making by creating a faculty line request template using APS data
- Created a comprehensive implementation, communication, and follow-up plan and stuck to it
- Prepared talking points and anticipated pushback/concerns
- Held formalized time for feedback



## New Components of Faculty Line Request Process



### User Ownership and Empowerment

To increase exposure to and comfort with APS data, department chairs were required to complete their own faculty line request template.

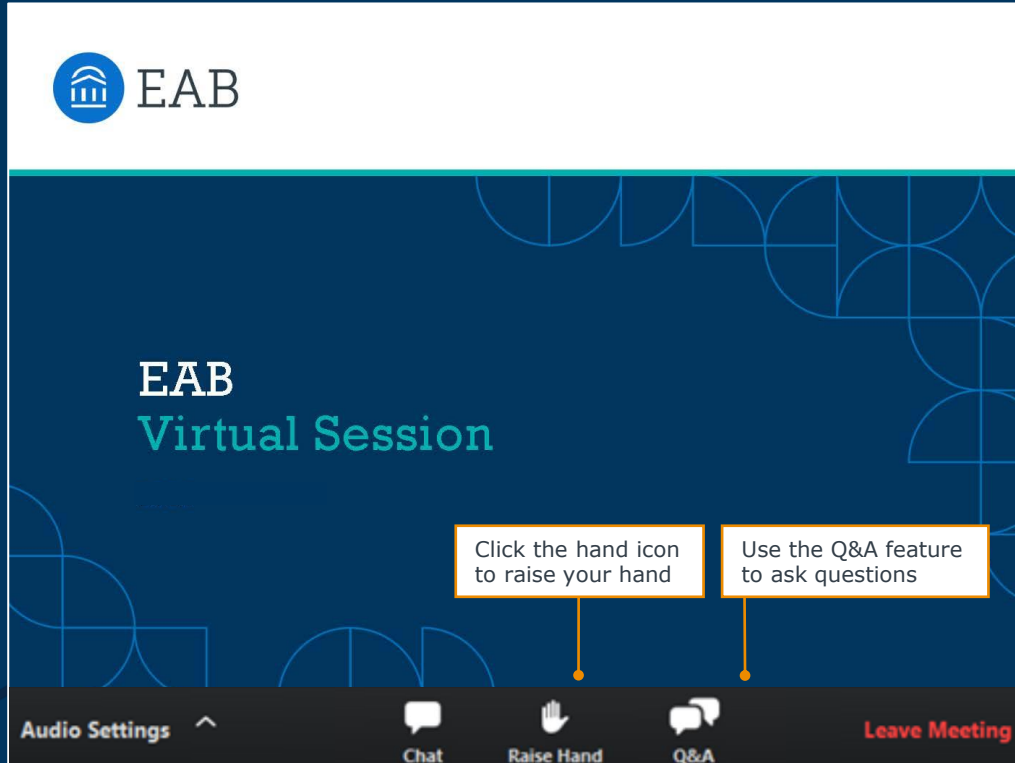


### A Scaled and Holistic Support Infrastructure

Brian/Becky took a three-pronged to support chairs with template completion:

- Series of training sessions
- Office hour sessions
- Supplementary resources (e.g., how-to guide, videos)

# Ask a Question!



The screenshot displays 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" in a serif font. The main background is dark blue with a pattern of light blue geometric shapes (circles and squares). The text "EAB Virtual Session" is centered in a white serif font. At the bottom is a dark grey control bar. On the left of the bar is "Audio Settings" with an upward arrow. In the center are three icons: a speech bubble for "Chat", a hand for "Raise Hand", and two speech bubbles for "Q&A". On the right is a red "Leave Meeting" button. Two yellow callout boxes with orange borders point to the "Raise Hand" and "Q&A" icons. The first box contains the text "Click the hand icon to raise your hand" and the second box contains "Use the Q&A feature to ask questions".

EAB

EAB  
Virtual Session

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

# Join Us Next Week!

## APS Virtual Summit Series, Sessions 3 and 4

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### 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



If you are registered for either or both sessions, you should have received an email from APS@eab.com to indicate your topic preferences.

The background is a dark blue gradient with several stylized, 3D-looking geometric shapes in teal and orange. These shapes are arranged in a way that suggests movement or a path. There are also several thin, white and teal lines scattered across the background, some parallel and some intersecting, adding to the dynamic feel of the design.

# APS

## Summit Series

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





# Our Work in Higher Education

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2007-2020

We serve senior campus leaders through distinct forums, each with its own research agenda and services.



2007

EAB launches **inaugural forum** serving academic affairs leaders



2008-2017

EAB adds **support for cabinet officers**, developing deep expertise across nine key terrains

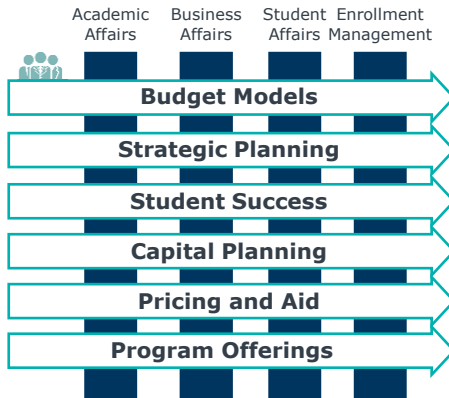


2018

EAB launches the **Higher Ed Strategy Forum** to provide greater planning, visioning, and organizational support

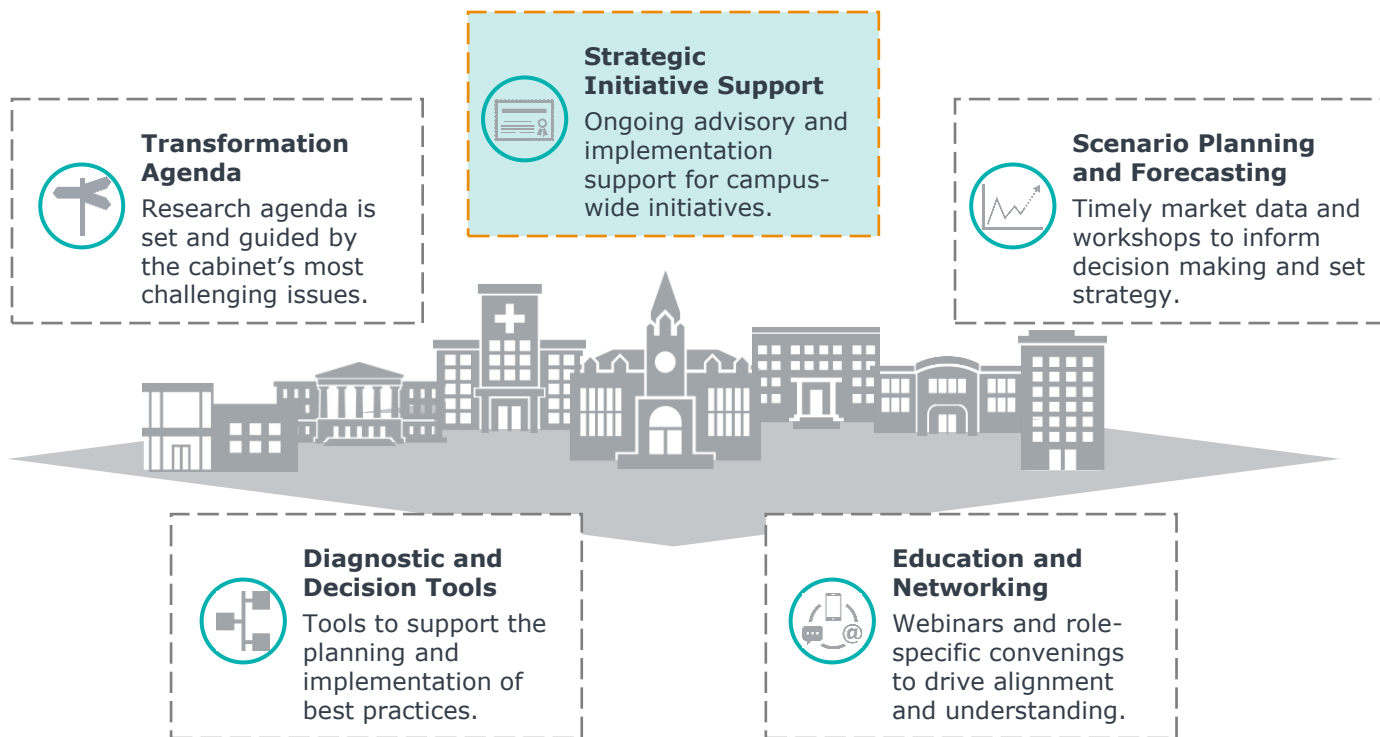
## 2021 Onward

As priorities converge around a core set of institutional challenges, we focus equally on providing sector-wide insights and practical guidance required to achieve meaningful change on campus.



## Introducing EAB's Strategic Advisory Services

We help you make meaningful progress on top institutional priorities by putting 14 years of best practice research, a deep bench of experts and an ever-expanding suite of advisory and implementation support services at your fingertips.

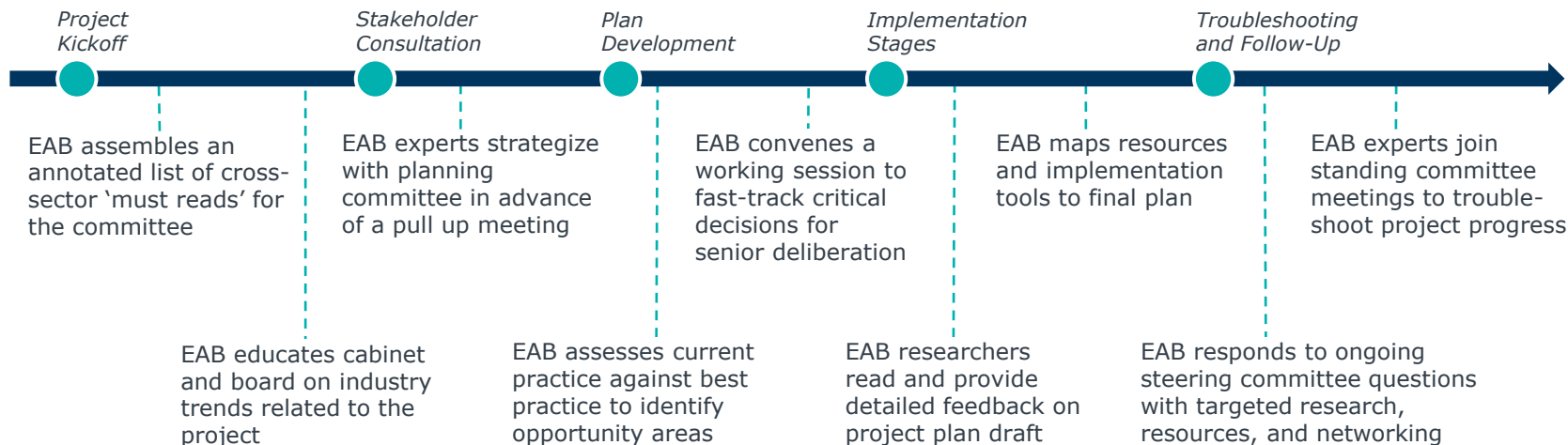


# Embed EAB Across Major Strategic Initiative Milestones

Whether You Need to Get Smart About the Future, Choose the Right Strategy, or Accelerate Implementation, Let EAB Be Your First Port of Call



## Advancing Your Work at Every Step in the Process



# Advancing Strategic Initiatives

## Sophisticated Support for Your Most Pressing Issues

**\*Identify 3-4  
Initiatives to  
Prioritize for Support**



**Enrollment  
Strategy**



**Student  
Equity**



**Institutional  
DEI**



**Persistence &  
Graduation**



**Research  
Enterprise**



**Program  
& Portfolio  
Management**



**Administrative  
Efficiency &  
Academic Resource  
Management**



**Financial Planning  
& Budget Model  
Design**



**Mental Health  
& Well-Being**



**Career  
Outcomes**

# Strategic Partnership Plan Enables You to Maximize ROI from Day One

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## Your Partner Services Team



- ▶ **Strategic Leaders** learn your organization and culture, working across the organization to provide the right combination of services and resources
- ▶ **Subject Matter Experts** provide on-demand strategic advice and best practice recommendations

## Getting Started on Your Existing Priorities



### What Are Your Top 2-3 Initiatives?

- BIPOC faculty retention
- First-year retention rate
- Program prioritization
- Budget model redesign



### Where Do You Want to Be in 12-18 Months?

- Don't know—you tell us!
- From *ad hoc* to good
- From good to great
- Pursuing "moonshot" target



### What Are Your Key Upcoming Milestones?

- Board meeting
- Strategic plan deadlines
- Committee meetings
- Project deliverables



### Which Functions Need Support Right Now?

- Academic Affairs
- Business Affairs
- Career Services
- Diversity, Equity, Inclusion

## Sample Partnership Launch Roadmap

**Welcome call** to overview priorities and introduce your Strategic Leader

1

**Strategic workshop** on top priorities to develop partnership plan

2

Leaders complete **EAB maturity diagnostics** to benchmark performance and identify opportunity areas

3

**Interactive workshop** drives consensus on 2-3 practices well-suited for implementation

4

**Follow-up expert consultation** to ensure progress and stakeholder engagement

5

**Biannual partnership plan check-in** to ensure impact and develop next round of milestones and deliverables

6

# Higher Education's Transformation Agenda

Strategic and Tactical Insight to Help You Navigate an Uncertain Future



## **Blueprint for Growth**

Future enrollment trends amidst a shifting landscape



## **Diversity, Equity, Inclusion, and Justice**

Systemic responses to address systemic inequities



## **Future of Work and Learning**

Navigating shifts in student and industry needs and preferences



## **Business Model Transformation**

Strengthening financial outlook and investing in the future

## **Your Must-Have Partner for Navigating the Opportunities and Challenges Ahead**

- ▶ Holistic guidance to build unified strategy around cross-cabinet, cross-campus challenges
- ▶ Insight to stay ahead of the industry trends amidst an uncertain future
- ▶ Long-term strategy guidance paired with support to execute against near-term challenges

# Setting Course and Envisioning the Future

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## Scenario Planning and Forecasting Tools



Data and insights to help you track external markets, understand environmental factors, and pressure test assumptions to inform near-term decisions and long-range plans.

## Annual Partner Strategy Retreat



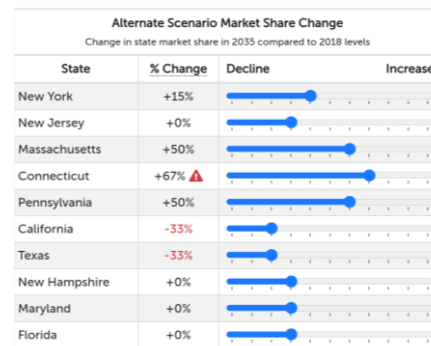
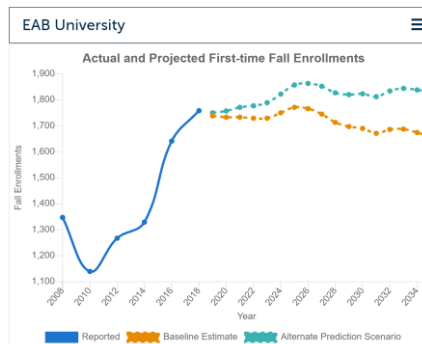
Customized working session for your senior-most team held virtually or in our DC offices to set strategy, weigh options, or seek advice on change initiatives.

## Institutional Strategic Planning Support



Robust resources to guide all stages and phases of planning from ideation and visioning to prioritization and metrics selection to sharing progress and results.

## EAB's Enrollment Scenario Explorer



# Driving Sustainable Change Across Campus

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## Implementation Collaboratives

Expert-led, cohort-based sessions take the guesswork out of complex projects - enabling your team to **accelerate the implementation of best practice.**

We provide step-by-step workbooks, timelines, and project management support to **fill critical skill, knowledge, and capacity gaps.**



*Guided data collection  
and discovery*



*Planning and office  
hours support*



*Change management  
and implementation*



*Ongoing project  
support*

## Current & Upcoming Collaboratives

Academic Efficiency

Administrative Efficiency  
*Coming Soon!*

Mental Health  
*Coming Soon!*

"The collaborative saved our team time, augmented our staff's abilities, and kept us on a timeline."

*Provost*

## Decision Support Tools

EAB decision support tools help partners **save time on planning, implementation, and execution** with actionable tools rooted in best practice research.

Data, private workshops, and expert audits help you **get smart quickly** and make better decisions.



*Organizational  
benchmarking*



*Maturity model  
diagnostics*



*Custom website &  
service audits*



*Expert reviews of  
planning documents*

## 100+ Customizable Resources:

- Virtual Student Services UX Audit
- Remote Work Policy Audit
- Undergraduate Portfolio Benchmarks
- Pricing & Aid Intensive
- Enrollment Strategy Gap Analysis



# Our Partnership Approach Ensures You Have the Right Support, in the Right Format, When You Need It Most

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## “The Value of an Outside Voice

“An objective, authoritative perspective from a partner beyond our immediate bubble makes all the difference in our willingness to accept what’s going to change whether we like it or not, and what’s possible if we pull together.”

*University President*

# Recapping Themes and How EAB Can Help

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*Learn More about SAS*

1

Learn what Strategic Advisory Services can bring your campus, including:

- **Research and expert advice**
- **Stakeholder education**
- **Strategic planning support**
- **Implementation support**
- **Networking and Professional Development**

*Leadership Beyond the Pandemic*

2

Receive our expert's recent blog post, "***Shifting from crisis response to strategic thinking***"



*Pre-register for a Webinar*

3

Pre-register for the next webinars in our series on Shaping the Future of the Academy:

- **BIPOC Faculty Recruitment**
- **The Future of DEIJ**
- **Build your Alternative Credential Portfolio**

4

**Something else?** Choose this option and we will reach out to you.