

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 from Annual Unit Health Check-Ups* presentation.

- Annual unit health check-ups are an important process to engrain on your campus to ensure senior leadership can diagnose the health of academic units on a more frequent cadence than the traditional program review process allows.
- EAB’s equation for transformation is People + Process + Technology = Transformation. Only when these three factors are equally balanced can an institution successfully achieve transformation with their new process (e.g., annual health check-ups) and cultural change.
- Lessons learned from annual health check-ups:
 - Many institutions put their process on hold or adjusted it due to the Covid-19 pandemic last year. For example, one institution chose to distribute an abbreviated report to academic unit leaders with “as needed” information to address issues under discussion at the time, such as faculty lines.
 - Process: Give space and guidance to include qualitative context in addition to metrics; tie the process to academic year and budgeting; implement a hold harmless period when transitioning to the new process.
 - Technology: Ensure the reporting template includes only 10-15 metrics to avoid analysis paralysis.
 - People: Create a three-tiered support infrastructure for users. Self-service, internal expertise, and external escalation.
 - Self-service resources: Institution-made microsite with customized resources, like an APS Quick Start Guide, guides, and videos.
 - Internal expertise: Institution’s local expert (e.g., Trainer) leads trainings, works with APS Strategic Leader to create resources, and answers user questions before escalating them to EAB.

Use the rest of this worksheet to document notes and ideas during Rebecca Cole and Dr. Brian Hinote’s (Middle Tennessee State University) presentation, *Hardwiring Data into Academic Resource Decision-Making and Generating Buy-In to Support Institutional Goals*.

- 1

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