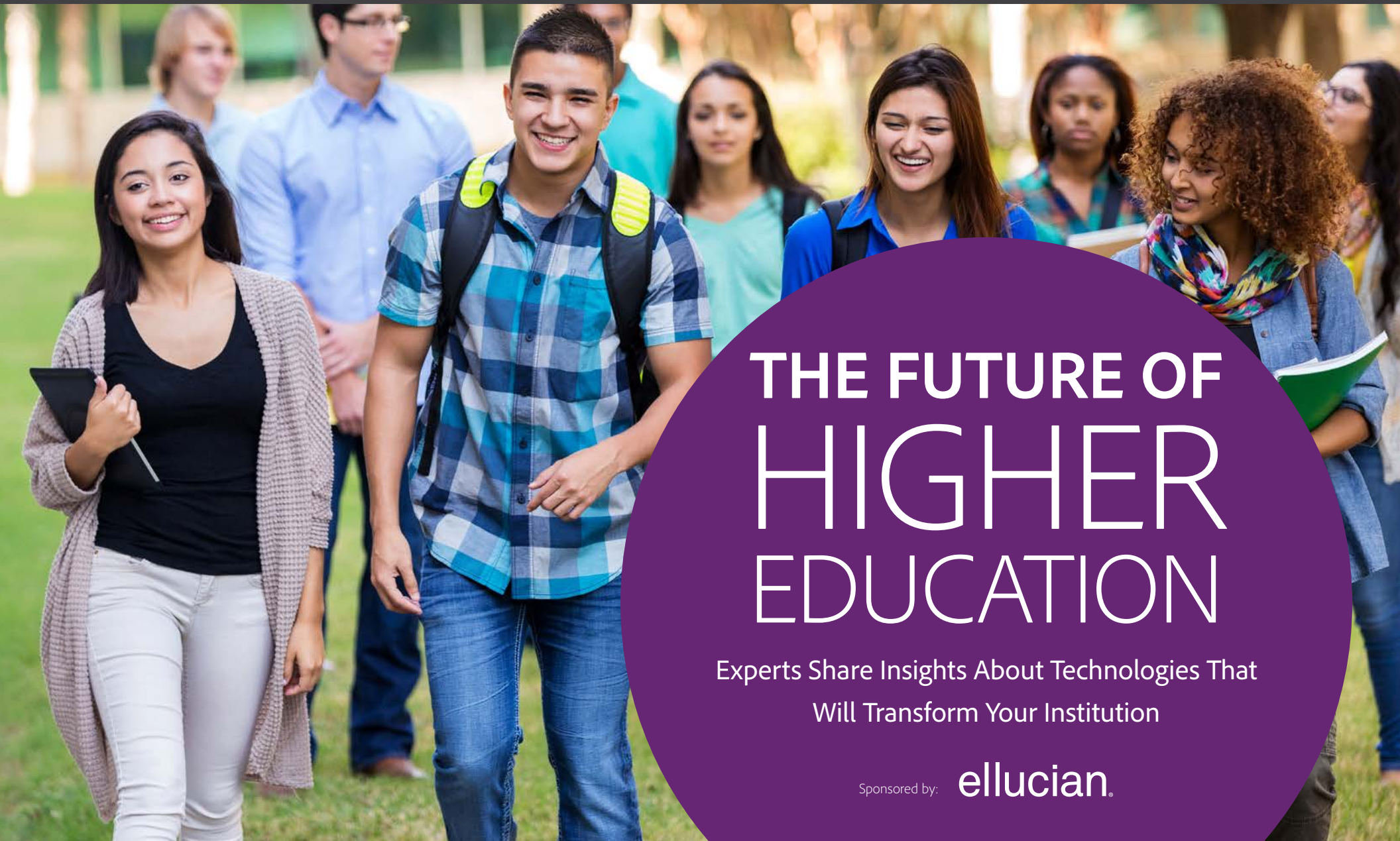




 Mighty Guides



THE FUTURE OF HIGHER EDUCATION

Experts Share Insights About Technologies That
Will Transform Your Institution

Sponsored by: **ellucian.**

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FOREWORD

In 2016, the *New York Times* reported that of all the jobs created in the United States since 2008, 99 percent went to people who had some college experience; 72 percent went to people who had at least a bachelor's degree.

Gallup finds that 70 percent of Americans now consider a college education “very important.” In 1979, that figure stood at just 36 percent.

Driving the point home, according to the Bureau of Labor Statistics, the percentage of high school graduates opting for higher education has risen in each of the past three years. Why? A Georgetown University study predicts that 3 million jobs will be left unfilled in 2018 because workers lack the requisite skills.

We are seeing these trends reflected around the world, and despite what we hear about shifting demographics, budget cuts, and the returns on investment students receive, the numbers point to an era in which student success will drive our shared prosperity like never before.

That's why we've asked thought leaders across higher education and the private sector to share their perspectives on how best to seize the opportunities ahead. Recruiting. Retention. Development. Increasing efficiency. Breaking down the information silos that impede informed decision making across the campus. These are just a few of the topics you'll find covered in the pages to follow.

From best practices to peer recommendations to personal experiences, we've tapped into the collaborative spirit of higher education to help you create a modern, connected campus that meets every student, faculty, and staff member's need. We hope this guide is helpful as you lead your institution into the exciting times ahead.



Regards,
Jeff Ray
President and CEO
Ellucian

ellucian®

Ellucian is the worldwide leader of software and services designed for higher education. More than 2,400 institutions in 40 countries rely on Ellucian to help enable the mission of higher education for over 18 million students. Ellucian provides student information systems (SIS), finance and HR, recruiting, retention, analytics and advancement software solutions. With more than 1,400 unique deployments of Ellucian's cloud and SaaS offerings, the company is one of the largest providers of cloud-based solutions. Ellucian also supports the higher education community with a range of professional services, such as application software implementation, training, education, and management consulting. Visit Ellucian at www.ellucian.com

INTRODUCTION

These are exciting — and trying — times for higher education. Many institutions face smaller, tighter budgets but feel the pressure to modernize technologies to stay competitive.

Through a generous partnership with Ellucian, we've spoken with 20 institutional leaders and experts to learn more about technology challenges and trends in five key focal areas: student success, cloud computing, analytics, advancement, and talent management. During these discussions, the experts shared success stories about operational efficiency, student and staff engagement, and degree completion. They also recounted lessons learned from the challenges they faced while putting new technologies into place.

One thing they all agree on is that when implemented properly and executed well, technology is a platform on which all postsecondary learning institutions can build success. These professionals also highlighted the need for a holistic view of technology across the institution and a concrete plan for campuswide deployment as essential for success.

I trust you'll find these experts' insights and advice useful and that after reading this book, you'll come away with solid strategies to help advance the use of technology in your college or university.



All the best,
David Rogelberg
Publisher



Mighty Guides make you stronger.

These authoritative and diverse guides provide a full view of a topic. They help you explore, compare, and contrast a variety of viewpoints so that you can determine what will work best for you. Reading a Mighty Guide is kind of like having your own team of experts. Each heartfelt and sincere piece of advice in this guide sits right next to the contributor's name, biography, and links so that you can learn more about their work. This background information gives you the proper context for each expert's independent perspective.

Credible advice from top experts helps you make strong decisions. Strong decisions make you mighty.

Section 1: Student Success

We asked: Please tell us about the recent implementation of a new technology (eg. early alerting, early engagement, degree planning solution) that has had a major impact on student success. What approaches were used to measure success?



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Our website and our student portal provide a hub of digital engagement, complimented by our comprehensive social media strategy. Prospective and current students and alumni all feel more connected to Bridgewater State University because of these efforts within Student Affairs and Enrollment Management.



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DR. EDMUND T. CABELLON

Assistant to the Vice President, Student Affairs and Enrollment Management, Bridgewater State University

EXCELLENT ADMINISTRATION LEADS TO EXCELLENT STUDENT SERVICE



**JERRET
LEMAY**

Registrar,
State University of New York
College at Oswego

Jerret LeMay is registrar at State University of New York (SUNY) Oswego and project manager for SUNY's Transfer Finder initiative, which facilitates seamless student transfer among SUNY institutions. He has served on multiple customer advisory boards and development partner groups for higher education technology.



LinkedIn

As registrar at the Oswego campus of the State University of New York (SUNY), Jerret LeMay is proud of the way his office and team are already improving student success, and he expects that success to only grow over time. "The way I see it, the first step toward good student service is to make sure your administrative functioning is in good order," says LeMay. "Are you setting up processes that are going to avoid problems? If there are problems, are you identifying them before anybody else notices? If you do identify them, can you remediate them? All these things really happen on the administrative side long before a student needs to pick up the phone, send out an email, or walk into the office."

Providing a high level of student service at SUNY Oswego is still a bit of an art, with many "old-fashioned" techniques still deployed to personalize student communications and guidance—the sort of customization that comes from experience and can be difficult to institutionalize through technology. With more than 8,000 students at Oswego alone and 64 campuses making SUNY one of the largest higher education systems in the country, technology plays a major role in improving both student experience and graduation rates. For LeMay, two initiatives stand out as particularly notable. >>>



The first step toward good student service is to make sure your administrative functioning is in good order.



KEY LESSONS

- 1** Deploying a degree-planning solution is the first step in helping students make good choices and see the most efficient road maps to their academic goals.
- 2** A system-wide solution that allows transfer students the ability to compare various inter-institution programs greatly improves student options and reduces issues.

EXCELLENT ADMINISTRATION LEADS TO EXCELLENT STUDENT SERVICE

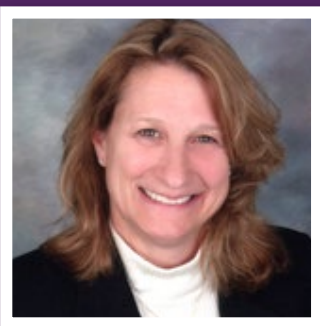
The first, which was implemented two years ago on a limited basis and is now being rolled out more widely, allows students to create a unique education plan. “We really started to get into student educational planning in terms of providing electronic templates for students when they walk in the front door,” says LeMay. “These plans lay out academic programs in a way that not only helps students stay on track and take some of the guesswork out of the prerequisite structure but also see courses that are actually going to be offered.” Working with an advisor, students map out what their time at SUNY Oswego should look like, and experience demonstrates that having an upfront plan leads to greater success and higher graduation rates.

By mining the student plan data, university administrators can schedule course offerings more tightly to meet demand. Thanks to a good interface between Oswego’s registration system and its degree auditing and tracking software, there is less confusion between what advisors have recommend for students in their plan and the courses being offered at a given time. “We know that students who use our planning templates avoid prerequisite errors to a much greater degree,” points out LeMay. “We know that they also run into fewer major or minor restrictions and our registration system also provides a visual layout for the calendar that helps students avoid time conflict errors. We know that all those errors happen at a much lower rate than for the general student population.”

The second initiative that excites LeMay is the transfer finder capabilities in its degree-planning tool that allow a student at any SUNY institution to sit down and essentially run a what-if scenario against any other SUNY institution. “That is a really powerful tool because if you are at a two-year institution and you’re targeting multiple programs at multiple SUNY campuses, you can know while you’re still taking courses at the community college exactly what the requirements are at your destination four-year institution,” says LeMay, who manages the project for the entire SUNY system. “You can make choices during those first two years that will put you in a better position when you do transfer to the four-year institution. In doing that, you can avoid a lot of troubles along the way.” ■

“
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avoid time conflict errors.
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EMBRACE A HOLISTIC, LONG-TERM APPROACH TO STUDENT SUCCESS



DEBORAH LUDFORD

District Director, Information Services,
North Orange County
Community College District

Deborah Ludford worked for 10 years in the private sector before leaving to become a professor of computer science and information systems. She has since been president of the academic senate and chief information systems officer at two colleges, is past president of the Chief Information Systems Officers Association for California Community Colleges, is treasurer of the CCC Banner User's Group, and is a board member of CENIC. Currently, Deborah is district director, Information Services, at North Orange County Community College District.



Website

In her position as district director of Information Services at one of California's leading community colleges, Deborah Ludford understands the challenges of building long-term solutions that address student needs holistically. Despite a budgeting process that sometimes favors short-term answers, she and her team have recently initiated seven specific technology programs that improve student access and service over time. Ludford points to three of these programs (education planning, customer relationship management, and assessment), as the most promising, and the ones that have her most excited about the future.

Education Planning

"Research shows that students who develop a formal education plan early on and who enjoy early successes in their coursework, particularly in math and English, are more likely to persist and complete their degree," says Ludford. "Such an outcome requires monitoring success, completion, and retention on a regular basis across the entire system." The North Orange County Community College District began implementing online tools and technology to deliver its orientation process. >>>



Research shows that students who develop a formal education plan early on and who enjoy early successes in their coursework are most likely to persist and complete their degree.



KEY LESSONS


- 1 Educational technology that follows students throughout the entire higher education lifecycle helps boost student success and identify potential obstacles.
- 2 Intercepting students' behavior early, both good and bad, is one of the most effective ways to keep them in the system and help them graduate with their degree of choice.

EMBRACE A HOLISTIC, LONG-TERM APPROACH TO STUDENT SUCCESS

“Students can go into the system and—based on who they are and what they’re interested in—they get a ‘tree structure’ set of questions,” Ludford explains. “Depending on how the students answer these questions, they get a specific set of additional materials to complete (for example, for international students or students with disabilities or special needs). The carrot for completing this process and submitting an education plan before enrollment is that the student gets priority at registration.”

Customer Relationship Management

The North Orange County Community College District also uses a customer relationship management (CRM) system to identify students who may be at risk, says Ludford. The CRM system monitors the student and can identify when he or she is potentially in trouble. Then, a counselor does an intervention to see what the cause might be and whether a new education plan is in order for that student.

“We’re trying to be proactive as we work with students,” says Ludford, who explains this goes beyond an early alert program. “It’s holistically looking to see whether students are progressing,” she says. “If they’re not, then we identify that and try to intervene because it’s far better for us to keep students who are already in the system and get them through rather than lose them, and then have them come back into the system later and start over. We can also use that same system to look at students who are doing well,” she says. “We can send them an email to say, ‘Hey, you’re doing awesome. Keep up the good work.’” 

“
We have found in our system that it's the personal touch which is most effective. If students feel that somebody cares about them on the campus, and cares about their success, then they are more likely to succeed.”

EMBRACE A HOLISTIC, LONG-TERM APPROACH TO STUDENT SUCCESS

The CRM system encourages teachers, counselors and administration to all be involved in managing a student's progress and provides a single platform to assure consistency, transparency, and accuracy. "We're using it on all fronts to try to keep students involved," says Ludford, "persistently following up with them because what we found in our system is that it's the personal touch which is most effective. If students feel that somebody cares about them on the campus, and cares about their success, then they're more likely to succeed."

Assessment

"Another important thing that we do is assessment," says Ludford. "We have a statewide initiative, and now the state is building tools so that soon no matter where you're assessed in the state, you can move from institution to institution and your assessment results will follow you." The North Orange County Community College has had many of these programs in place for years. Now that they're being implemented statewide, the collective results will be even more helpful to students.

"The other thing we've done," she says, "is move to a model of what we call *multiple measures*. Multiple measures say that no single assessment can determine where you're likely to be placed because a single assessment isn't that accurate or reliable. So now, we look at students more holistically—high school graduation rate, the courses they took and how they did in them, and any work they may have done at another community college. Then, we add in the assessment, trying to place each student in the highest-level class for which he or she qualifies. A single assessment just doesn't do that." ■



Student success today demands an immersive, wraparound experience for the student to ensure they're attracted to the institution and consider it their institution of choice, that they remain engaged, that they're driven to graduate and that they're prepared to transition seamlessly into their career of choice.



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PAIGE FRANCIS
Associate CIO, University of Arkansas-Fayetteville

USE AUTOMATION TO ENHANCE SUCCESS



CHRISTY RIDDLE

Executive Director, Student Success Center,
Delta State University

Dr. Christy Riddle has 19 years of experience in higher education and provides leadership to Delta State University's Student Success Center, in Cleveland, Miss. The Center includes five divisions: academic advising, academic support, first year seminar, international student services, and Okra Scholars, a *First in the World* project supported by a major grant from the U.S. Department of Education's Fund for the Improvement of Post-Secondary Education. She earned a Ph.D. in Human Capital Development from the University of Southern Mississippi.



Website | LinkedIn

Stay Okra Strong. Dr. Christy Riddle, executive director of the Student Success Center at Delta State University (DSU), says that this motto is the center of the retention-related technology advances on her campus. The Fighting Okra is DSU's unofficial mascot, chosen because okra is a hard, prickly vegetable that has strong roots and stems. Shortened, the saying becomes *SOS*, an early alert when students struggle and might need a little extra help. "Anyone can alert someone. So, for example, if a student has missed three classes, a faculty member can submit an alert. Our SOS coordinator receives the alert, and then, depending on what the SOS is, determines how to follow up," Riddle says.

The system started as a barebones Microsoft Excel-powered method to track student performance in an effort to improve retention and completion rates. "Our success rate with SOS right now is about 65 to 70 percent," Riddle says. It is a time-consuming process, however, because it is entirely manual. >>>



The new system will enhance the efforts of academic advisors by providing readily available online data regarding their advisees, expand the tracking and monitoring capabilities of the Student Success team, and streamline campus-wide retention efforts.



KEY LESSONS

- 1 Using technology to automate early alert systems can help increase retention and completion rates.
- 2 Patience and a thorough understanding of the institution's needs are key when implementing a student success/ advisement application.

USE AUTOMATION TO ENHANCE SUCCESS

SOS is one initiative that's helping increase the retention of DSU students. Since the launch of the Student Success Center in Fall 2012, Riddle's team has seen solid indicators that campuswide efforts are paying off. "This fall, our fall-to-fall retention rate is up 5.2 percent from the previous fall for first-time, full-time freshmen, and 7.8 percent for first-time, full-time transfer students."

That is good news for DSU as the university pilots Ellucian CRM Advise, a new success and retention application—an application that will improve on the university's overall retention efforts. The new technology will not only allow better SOS tracking but expand capabilities. "In addition to automating the early alert program, the new system will enhance the efforts of academic advisors by providing readily available online data regarding their advisees, expand the tracking and monitoring capabilities of the Student Success team, and streamline campuswide retention efforts," says Riddle.

Riddle says the process has underscored the importance of patience. "It takes time because this program is customized for DSU. It's not off the shelf, with stock templates. Everything is customized." To have that level of customization, she says it is essential to have a good partner that takes the time to understand your needs. She also suggests finding on campus champions who can help guide the process. "We piloted the system in fall 2016, with the faculty academic advisors in the College of Education and Human Sciences, with two faculty members taking the lead on implementing the technology. This group of faculty has been instrumental in shaping the product for the rest of the campus as we go campuswide in spring 2017."

"Technology is vital," Riddle says. "We get anywhere from 150 to 250 SOS alerts a semester, and benchmarking it is a constant challenge. We don't currently have an automated process, so we are looking forward to fully implementing Ellucian's product. The manual process has been gruesome, but I think it's been really beneficial to start off that way because now we're creating the capabilities we *know* we need." ■

“
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”



RICHARD SLUDER

Vice Provost for Student Success and Dean, University College, Middle Tennessee State University

Richard Sluder is vice provost for Student Success and Dean of University College. He leads Middle Tennessee State University's Quest for Student Success, which includes transforming advising by integrating predictive analytics, course redesign, and tutoring initiatives. As dean, he oversees work with undecided students, adult degree completion, online learning, summer sessions, and academic outreach to high school students. Richard has 22 years of prior experience at the University of Central Missouri as vice provost, dean, and faculty member.



Website | LinkedIn

Richard Sluder, vice provost for student success and the dean of University College at Middle Tennessee State University (MTSU), joined the university in 2014 shortly after it implemented a new program called *Quest for Student Success*. The university hired 47 new advisors and implemented an advising platform with predictive analytics.

The system enables an intuitive, institutionwide view of students, which is also user-friendly. "We can consult the system and get a picture of a student quickly," Sluder says. "The platform gives you student information on one side." On the other side, Sluder says the institution has access to all the tools and analytics necessary for helping students achieve success.

"It's also a platform from which to conduct outreach, so we can filter and sort and search for basically any group of students, and then communicate with them through the platform," Sluder says. He explains, "If I'm an advisor and I have a caseload of 300 students, I can search and filter within seconds to identify all the first-year students who have less than a C average in any course at midterm." >>>



I can search and filter within seconds to identify all the first-year students who have less than a C average in any course at midterm. Then, I can communicate with those students to ask them to come in, set up appointments.



KEY LESSONS

- 1 Technology integrated across the institution allows advisors to track and monitor student achievement and progress and respond to potential challenges to ensure that student retention and completion remain high.
- 2 Student success starts with invested leaders and becomes part of the institutional culture, from registration through graduation.

TECHNOLOGY INITIATIVES GUIDE STUDENT SUCCESS

“Then, I can communicate with those students to ask them to come in, set up appointments. The possibilities are endless when we can identify students based on different criteria.”

The tool that Sluder uses is a full-service advising tool, so it also has many other features that help track and communicate with students to ensure their success. For example, he says, “It gives us the ability to do risk prediction—to identify those students who are at risk, conduct the outreach, draw them in, and then drive them toward services so that they can get help before it’s too late.” Such a system would also allow MTSU to identify high-performing students as well, making it possible to open increased access to further opportunities for these students.

Sluder points out that the success of the deployment hinges on user adoption. “Accessing the technology is a first step,” he says. “Getting people to use it is really the beginning. Many places have the finest technology available, but it’s not used across the institution. Our whole philosophy here when we brought the technology in was that *not* using the tools really wasn’t an option. It’s an expectation that everybody uses the tools.”

Another key to making the most of technology, says Sluder, is getting leadership buy-in. “You need key leadership to endorse it—not just talking about the tool being a strategic priority but making it the number one priority and part of everything we do.” In fact, Sluder says that buy-in is part of a formula for success that he calls a *70/30 principle*. “It’s 70 percent people, 15 percent technology, and 15 percent process. The magic is in putting those elements together to work in a particular way to get the outcomes you desire.” >>>

“
It’s 70 percent people, 15 percent technology, and 15 percent process. The magic is in putting those elements together to work in a particular way to get the outcomes you desire.”

TECHNOLOGY INITIATIVES GUIDE STUDENT SUCCESS

To benchmark success, Sluder suggests choosing specific areas that are important to your institution, and then following those initiatives over time. “We talk about a limited number of strategic priorities. We see institutions that are doing a million things because they’re big and there’s a lot of stuff going on. We’ve been very careful to say, ‘These are the key strategic priorities that we’re focused on.’ We publish them; we keep going back to them. We make sure those are the things we’re paying attention to. We’re not spread a mile wide and an inch deep.”

The technology and philosophy seem to be working. MTSU has seen a freshmen retention rate increase from 68 percent in 2013 to 76 percent as of fall 2016. “If we’d just hired new advisors and let them do work the old way, we’d have a system that wouldn’t make much difference. It’s really about the transformation to using data in an analytics platform to structure work strategically so that we can assist the students who need that assistance most.” ■



The growing focus on student success in higher education has been one of the most encouraging and inspiring developments I've witnessed over the last few years. I appreciate the importance of research for some institutions, but schools still ultimately exist to serve students.



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KELLY WALSH
CIO, The College of Westchester

THE EVOLUTION OF TECHNOLOGY BRINGS OPPORTUNITIES



**DIANA
OBLINGER**

President Emeritus,
EDUCAUSE

Dr. Diana G. Oblinger is President Emeritus of EDUCAUSE, a nonprofit association of 2,400 colleges, universities, and education organizations whose mission is to advance higher education through the use of information technology. Previously, Oblinger held positions in academia and business, including the University of North Carolina system, IBM, and Microsoft. She is known for her leadership in information technology, particularly its impact on enhancing learning and improving college readiness and completion. Oblinger has received outstanding teaching and research awards and holds three honorary degrees. She currently serves on the Board of Directors of Ellucian.

Diana Oblinger says that the technology around student success has come a long way. “Twenty years ago, the ‘technology’ that we used were called *one-stop centers*,” she explains. “They were physical places. Before one-stop centers, students had to hopscotch across campus trying to find an office for this, an office for that.” Today, Oblinger says, technology does the integration. For example, rather than having to go to the registrar’s office, an advisor’s office, and the financial aid office, those services are accessible online.

“Now we’ve moved into an era where we’re using analytics to increase student success—things like predictive analytics and early alerts let students know where they stand and what their options are. ‘Nudges’ remind students of things that they can do to enhance their performance or give them a pat on the back for what they’ve achieved. All this hinges on thinking about the student’s life holistically rather than where an office is located on campus. As good as technology is today, our understanding of students and how to support their success will continue to evolve.” >>>



With student success systems, institutions are making higher education's processes more transparent so that students can see where they are; where they're going; and, what they might need to do if they choose a different path.



KEY LESSONS

- 1 Using technology to increase student success requires that you first understand your students and their needs. Only by taking a holistic view of each student can institutions truly implement technologies for student success.
- 2 Technology is evolving. To achieve long-term success through technology solutions, it's essential to look forward and envision the technological needs of the future.

THE EVOLUTION OF TECHNOLOGY BRINGS OPPORTUNITIES

“Much of the evolution of student success is about transparency,” Oblinger explains. “Students often don’t see clear pathways, guidelines, or milestones. With student success systems, institutions are making higher education’s processes more transparent so that students can see where they are, where they’re going, and what they might need to do if they choose a different path.” An added benefit, Oblinger says, is that students can see what’s possible. “Today’s student success tools help students select majors, choose careers, anticipate how long it will take them to get their degree, and better understand the labor market. Those are important elements of a college-to-career pathway.”

Oblinger points out that while student success initiatives are maturing, some challenges still exist. “Student success a few years ago wasn’t talked about as much as it is today. A common stumbling block is just defining what ‘student success’ means to your students and your institution and how you get there.” She points to other challenges, as well. “One is having the technology in place to implement these student success systems. You’ve got to have good data and analytical tools. In addition, institutions have to work through data-governance and policy issues.” Whether technology or policy, the issues can be complicated, Oblinger says.

Oblinger continues, “Funding is always a stumbling block for any kind of major initiative. You need resources not just for technology but also for professional development. People need to know how to use the tools. A tool is only as good as the people who use it.”

Despite the challenges, Oblinger believes that institutions can use technology to achieve greater success. “Student success and the systems that support it will continue to morph and grow stronger because we know more, we have more technological tools, and we have a greater understanding of students. Now more than ever we need to ensure that students are successful. It isn’t a one-size-fits-all solution, nor is it a one-time approach. We owe it to ourselves, our students, and society to help students be successful.” ■

“
Student success and the systems that support it will continue to morph and grow stronger because we know more, we have more technological tools, and we have a greater understanding of students.
”

Section 2: Cloud Transformation

We asked: Fear of the cloud has lessened and schools are rethinking their IT infrastructure. What advice would you offer a fellow CIO (or IT Director) to get the most out of the cloud to ensure long-term success? What advice would you offer to help mitigate the risks?



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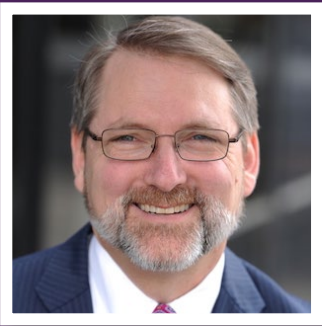


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HOW THE CLOUD AIDS HIGHER EDUCATION



SHELTON WAGGENER

Senior Vice President,
Internet2

Shelton Waggener is the senior vice president of Internet2, a U.S. national research and education network. A recognized leader in cloud technology, Shelton oversees the Internet2 NET+ cloud services program, which provides community and customized commercial cloud services such as security, infrastructure, platform, software, and research environments to more than 300 U.S. universities. Prior to joining Internet2, Shelton served as associate vice chancellor and CIO of the University of California, Berkeley.



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Those who are making the move to the cloud should treat the shift as a full transition from one technology stack to another, says Shelton Waggener, senior vice president of Internet2. “The difference from on-premises transitions (like mainframe to mini, client server to web server) is that the technology stack isn’t one that you build locally,” he says. “Cloud platforms simply move much faster than any previous technology transition. This migration is accelerating the pressure on chief information officers globally, across all industries, to evaluate their technical platform strategies. You simply cannot avoid being in the cloud, whether you want to or not.”

“Three dimensions, without question, drive higher education CIOs’ need for the cloud. Surprisingly, none of them has to do with cost, which is where many people start and end their thinking about the cloud. While costs are a substantial issue and certainly a consideration worth engaging in and building a strategy around, that isn’t really the most significant driver. Instead, there are three trends around cloud that are the most significant drivers: *mobile-first strategy, big data, and security*,” says Waggener. >>>



Students don't think in terms of constrained environments. Just like they do in the real world, they need to be able to make decisions in real time, all the time.



KEY LESSONS

- 1 Mobility, big data, and security are the driving forces behind higher education institutions’ move to the cloud because they are areas in which cloud apps and vendors excel and can help institutions make considerable improvements.
- 2 Recognize that every institution is already in the cloud by way of their students’ cloud access. Therefore, cloud adoption allows institutions to gain useful insight into and control over that access.

HOW THE CLOUD AIDS HIGHER EDUCATION

“The question of moving to the cloud is driven not by the cloud itself but by its alignment with the mission of higher education as an industry, who we are culturally and practically. We must collaborate to learn, innovate and advance scholarship. We’re geographically diverse across multiple campuses—even within single universities—and across institutions, so the collaboration with each other is critical. Social media and social networking have provided the means for people to stay online and be connected at all times. Everyone is using the cloud daily, removing the question whether you should adopt the cloud or not. In fact, your institution is already adopting the cloud as a primary computing platform. The CIO’s job is to find ways to make your institution’s move to the cloud as simple as it is for people to adopt applications on a smartphone.”

As an example, Waggener points to changes in the way students currently interact with institutions. In the past, colleges designed courses with physical time and space constraints in mind. Today, however, those barriers no longer exist. “Students don’t think in terms of constrained environments. Just like they do in the real world, they need to be able to make decisions in real time, all the time,” he says.

Another essential part of the technology shift, according to Waggener, is big data. “The big data dimension of cloud computing is more than the shift from owning infrastructure: It is now allowing for the ability to handle all the capacities, indexing, and management of the data or the applications environment that optimize your administration.” >>

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I really believe that being in the cloud gives our higher education institutions the opportunity to be more secure than they would be by themselves.
”

HOW THE CLOUD AIDS HIGHER EDUCATION

“Most savvy CIOs have recognized that what matters isn’t the computing power, storage, or even the application but the data itself. And not just the data but the *metadata*—the data about the data. If you think in terms of all the technology activities we do every day, every click on a device, every page view, every consideration of a student or a faculty member is actually a data point to be managed, secured, and privacy protected. That’s the responsibility of the CIO.”

“You need a technology environment that can expand or contract all the data collection and data analytics that take place,” he adds. “If you’re going to build your own data center to accommodate all the possible use cases (particularly for supporting research use cases), you need a lot of land and a lot of electricity. That’s just not a viable path for our resource-constrained universities.”

Finally, security presents a special challenge for institutions not only because of their collaborative nature but also because of the thousands of individuals who come to higher education fully connected through many of their own devices. How do you secure such a wide array of environments? The old days of building central environments and trying to secure them is no longer effective (nor possible given budget constraints). Waggener says that institutions that are avoiding moving anything to the cloud shouldn’t fear security, however. “What we’re seeing is cloud companies whose very survival is based on the security of their customers’ data. They invest a much greater percentage of their resources in security than higher education is able to allocate. By carefully considering options and adding cloud services in the right way, universities are actually adding security. I really believe that being in the cloud gives our higher education institutions the opportunity to be more secure than they would be by themselves.” ■

TAKE A DIP IN THE CLOUD COMPUTING KNOWLEDGE POOL



**TOM
DUGAS**

Director of Information
Security/Special Initiatives,
Duquesne University

As the director of Information Security/Special Initiatives at Duquesne University, Tom Dugas develops and oversees a comprehensive, unified information cybersecurity program that includes detection, prevention, incident response, and threat awareness. He is also responsible for identity and access management and data governance.



Twitter

Institutions tend to fall into one of three phases of cloud computing adoption, according to Tom Dugas, director of Information Security and Special Initiatives for Duquesne University.

“The first category is *cloud aware*, where an organization is just thinking about moving to the cloud. The institution knows that the cloud is out there, but it’s not sure what it’s going to do with it or how to get started with cloud adoption. The second is *cloud experimentation*, where the institution starts to focus on one particular service—email, for example—to get to the cloud. The third is *opportunistic cloud*, which is where Duquesne fits. We look at cloud solutions as ‘what is the right opportunity?’ My advice is, figure out where on that ladder your organization thinks it is, and then think about the considerations in each area.”

Dugas says that most colleges and universities fall into the group that is experimenting with the cloud. “What you want to think about is whether somebody has paved the path already. Higher education is rich in collaboration and opportunity, and we can use what a lot of other folks have done before us in cloud adoption without having to reinvent the wheel. Take the path already paved. Use what you can from collaborative efforts.” >>>



Take the path already paved. Use what you can from collaborative efforts.



KEY LESSONS

- 1 Heed the lessons learned by early adopters before moving to the cloud, including how they have adjusted their security strategies to secure cloud services.
- 2 Expect the way you allocate resources, especially employee resources, to change, but recognize that any savings you experience by implementing cloud services will likely come from other types of changes.

TAKE A DIP IN THE CLOUD COMPUTING KNOWLEDGE POOL

Despite the collaborative nature of higher education, some institutions still have cloud security concerns. According to Dugas, however, “Going to the cloud doesn’t change your risk strategy: It just helps you focus on different aspects of it.” For example, “The important things to think about in cloud computing risk strategy are identity and access management (IAM). What is the authentication method? What kind of authorization do you use? Can you federate it? Does it work with your existing integration and existing IAM points?”

Dugas says many institutions also worry about their data. He suggests asking questions such as, “What kind of data are you looking to host in the cloud, and how will you secure those data? Are you using single tenant or multitenant? Will your data be spread out across multiple data centers across the United States or even in foreign nations?” He advises, “Don’t be afraid to ask those questions about your data.” He also suggests that new cloud users also look inward, especially when it comes to risk assessment. “Higher education is a really great collaborative area,” says Dugas, “but I think it’s important to conduct an independent risk assessment. Don’t assume that that assessment will turn out the same as the next institution’s.”

Dugas cautions that institutions won’t necessarily need fewer resources. Instead, you may find that you use existing resources differently. “You may add resources or change resource assignments to have more systems analysts, business analysts, and integration experts rather than system administrators, database administrators, and network engineers. You switch it around a bit to focus more on all the key touch points between your cloud systems and your current systems on premise as well as your user community. Moving to the cloud gains you elasticity. It is not always a cost savings, but rather it gives you the ability to allocate resources differently.” These resource allocations often allow for new initiatives that can enhance the competitiveness of the institution or enhance the mission, which directly adds business value. ■

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Going to the cloud
doesn't change your risk
strategy: It just helps
you focus on different
aspects of it.

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A cloud-first strategy will help institutions address greater economies of scale, increased agility, and enhanced security while focusing on the core mission of providing faculty, staff, and students with more nimble and innovative services.



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R. "RAY" WANG

Principal Analyst and Founder, Constellation Research

PLAN FOR THE TRANSITION TO THE CLOUD



KENNETH C. GREEN

Founding Director,
Campus Computing

Kenneth C. Green is the founding director of the [Campus Computing Project](#), which is the largest continuing study of e-learning and information technology in American higher education. Campus Computing is widely cited as a definitive source for data, information, and insight about key IT planning and policy issues that affect U.S. colleges and universities.

Like many observers of IT in higher education, Kenneth C. Green, founding director of [the Campus Computing Project](#), views the arrival of mission-critical, cloud-based enterprise resource planning resources and services to be a matter of *when*, not *if*.

“Campus IT leaders recognize that the cloud is inevitable. For example, 83 percent of the participants in the fall 2016 Campus Computing Survey said that cloud computing will play an increasingly important role in their campus ERP strategy. That’s a big number. Campus IT leaders acknowledge that their institution’s impending migration to the cloud is a transition that involves not just technology and data but also people and work processes,” says Green.

Green notes that even though campus IT officers know the cloud is inevitable and view it as beneficial, many institutions aren’t yet rushing to the cloud for key ERP applications. “Our fall 2016 survey data reveal that CIOs and campus IT leaders see the migration to the cloud for key ERP applications to be slow. For example, less than a fourth expect their campus to be running a cloud-based financial or student information system application in five years, by fall 2021.” >>>

“ 83 percent of the participants in the fall 2016 Campus Computing Survey said that cloud computing will play an increasingly important role in their campus ERP strategy. ”

KEY LESSONS

- 1 Educational institutions may feel uncertainty about moving to the cloud, but by waiting, they may be missing out on many of the benefits the cloud has to offer.
- 2 A successful move to the cloud should be preceded by in-depth planning, risk assessments, transition strategies, costing measurements and metrics, and keeping open communication.

PLAN FOR THE TRANSITION TO THE CLOUD

Why the slow migration? More than any other IT market segment, higher education is incredibly risk-averse. Many college and university IT leaders would prefer to see other campuses go first in order to learn from the experience of early adopters.

Moreover, for some campus tech leaders, cloud migration is also a matter of command and control over their IT resources and operations. Some IT officers may feel that their institutions have less control over key ERP applications in the cloud, even though—at least on paper or on a whiteboard—there are obviously significant operational, technical, and perhaps even financial benefits involved in migrating to the cloud for select applications.

There's also some concern about securing mission-critical data in the cloud. "There's a sense on the part of many institutional leaders that they have seen security problems in the cloud elsewhere, in corporate and consumer markets. So not surprisingly, campus IT officers want to know where their data reside and who is watching the data," Green says.

To ensure long-term success with cloud-based applications, Green suggests asking eight questions: "Can we, could we, why should we, what will it cost, when do we, what can others tell us, what don't we know to ask, and how do we assess success?" He also suggests adding one more. "There's sort of a precursor to these questions, and that is, What's the compelling message from my provider, and am I ready for that compelling message? This is really all about what you do in terms of planning, risk assessment, transitions, and understanding costs. Campus officials recognize that despite their best planning efforts they will encounter the inevitable 'known unknowns.' The challenge is having a plan to address these and related issues that emerge during the cloud migration process." >>>

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Campus IT leaders
acknowledge that their
institution's impending
migration to the cloud is
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not just technology and
data but also people and
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PLAN FOR THE TRANSITION TO THE CLOUD

One way, of course, is to learn from those who have already made the journey. “It’s important to learn from the experience of others,” Green says. He adds, “Take a deep breath and recognize that this is as much about collaboration and teamwork between provider and user as it is about collaboration and teamwork among the various constituencies on campus that will be responsible for implementation. There are a lot of moving parts, there are a lot of silos, and there will also be a few egos and fiefdoms involved in the transition.”

What’s Green’s strategy for success? “Set modest goals and realistic deadlines, work in teams, build coalitions, anticipate change, and communicate constantly,” he recommends. “Acknowledge the possibility of personnel turnover, because people move.” Finally, colleges and universities must see the value in the cloud and trust their tech providers if campuses are to migrate mission-critical institutional data and services to the cloud, and then reap the benefits that cloud technology can provide. ■

CAREFULLY CONSIDER CLOUD VENDORS



BILL THIRSK

Vice President of Information Technology/CIO,
Marist College

Bill Thirsk serves as the vice president of Information Technology (IT) and CIO at Marist College in Poughkeepsie, New York, where he oversees all areas of IT. Bill is a recognized expert in higher education technology management, providing his insights to recognized publications such as *The Wall Street Journal* and *CIO Magazine*. Bill also actively serves as board chair of NYSERNet.org and on the board of directors of the Northeast Research and Education Network.



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With more than 30 years of experience in higher education IT management, Bill Thirsk doesn't mince words when it comes to pinpointing why some educational institutions have been slow to adopt cloud-based software technologies. "I'm going to challenge the idea that there's fear of the cloud," he says. "I don't think there's ever been fear of the cloud. It's not fear, it's really a lack of trust for some of the people we do business with."

Thirsk cites examples of companies that have come and gone from the industry or have changed names and direction multiple times over the years and suggests that when a brand-new sales rep from one of these firms shows up in his office looking to establish a long-term trust relationship with a system of consequence, "I can tell you, it's just not going to happen."

"We are a different industry from the others for sure," says Thirsk. "We are much more parochial about what we do because our customers live with us. These students are with us 24x7—when we make purchases that are of consequence, we do it very, very carefully." >>>



I don't think there's ever been fear of the cloud. It's not fear, it's really a lack of trust for some of the people we do business with.



KEY LESSONS

- 1 Cloud vendors must earn an institution's trust by showing that they truly understand the education market and aren't simply the flavor du jour.
- 2 A more modular approach to software solutions can create greater flexibility, but often requires help in the form of integration services.

CAREFULLY CONSIDER CLOUD VENDORS

Thirsk suggests that colleges and universities must sort various functions into three distinct pillars, and then plan their cloud strategy accordingly:

- **Pillar 1: Systems of Convenience.** First, says Thirsk, are the systems of convenience, like booking travel or expense reports. These systems take a lot of maintenance and require outside relationships, but if they go down or are corrupted, “they’re not going to kill you.”
- **Pillar 2: Systems of Record.** The second pillar consists of systems of record, which may be proprietary to the institution and need a higher level of security and reliable access.
- **Pillar 3: Systems of Consequence.** The third and most critical pillar, says Thirsk, consists of “systems of consequence,” such as financial data and personal information—key sources of insight that provide a competitive edge or systems that, if a data breach occurred, could cost the college or university not only its reputation but also a lot money.

All three tiers require serious consideration, says Thirsk, but he suggests that the systems of consequence place a greater burden on vendors in terms of reputation, reliability, consistency, and compatibility. “We’re extremely careful to go only with high-level, trusted partners for any service provision, particularly those that are cloud-based.” >>>

“
These students are with us 24x7—when we make purchases that are of consequence, we do it very, very carefully.”

CAREFULLY CONSIDER CLOUD VENDORS

So, what are the most important considerations for choosing a trusted partner or vendor for cloud-based services?

“The first thing is that they have the right to be in the business,” says Thirsk. “By that I mean that their systems are well architected and not overly complex. A vendor has to earn the right to tell me as a technologist that they know what they’re doing.”

“The second thing to consider is whether the relationships underneath the system are fully disclosed,” says Thirsk. “When you go to most cloud providers, you’re signing for a Software as a Service function, sitting on top of someone else’s Platform as a Service and probably sitting on someone else’s real estate.” It’s critical for the educational institution to fully understand these relationships and what it is really signing up for.

Thirsk admits that some smaller institutions with limited budgets are turning to the cloud to increase their technology scope without having to make a lot of infrastructure improvements. Although he worries that this mindset can lead to unanticipated consequences—companies losing data, going out of business, suffering security breaches—he is encouraged that some vendors are moving to more focused, modular solutions that will give institutions better choices and additional flexibility. The challenge then becomes integration, says Thirsk, something both established vendors and new providers are beginning to address. ■

Section 3: Institutional Advancement

We asked: What trends and strategies are you seeing in advancement today and how are those supported by technology?

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MARK KOENIG

Assistant Vice President for Advancement Services, Oregon State University Foundation

Mark Koenig is assistant vice president for Advancement Services at the Oregon State University Foundation. He coordinates the foundation's fundraising efforts and oversees research, relationship management, IT services, and database management operations. Taking advantage of his 17 years of experience advancing higher education, Mark focuses on the development and use of funding best practices.



LinkedIn

What do university advancement and the private sector have in common? According to Mark Koenig, more than you might think — both types of organizations revolve around sales and marketing.

Koenig, assistant vice president for advancement services for the Oregon State University Foundation, asserts that many institutions have been slow to recognize the link between fundraising and marketing. “We must bring a for-profit marketing perspective to higher education,” he recommends. “Frankly, we’re medieval institutions, and we can be glacial at times, but I think that we as an industry have been missing the boat here.”

Instead, colleges and universities must think like multichannel marketers. “At the end of the day, the annual fund is a marketing division,” Koenig says. “They do segmentation, they send out mailings and emails, they may use crowdfunding or crowdsourcing initiatives, they may use the telefund — they must manage all the different vehicles through which they run their program.” >>>



The annual fund is a marketing division. They do segmentation, they send out mailings and emails, they may use crowdfunding or crowdsourcing initiatives . . . they must manage all the different vehicles through which they run their program.



KEY LESSONS

- 1 Legacy contact-management systems for higher education keep information in silos. A modern CRM system can connect to other systems and opens access to many more resources and data.
- 2 Universities can benefit from bringing a for-profit marketing perspective to higher education.

To accomplish their goals, institutions need the same sort of robust customer relationship management (CRM) systems that businesses do. Selecting the right solution for higher education can be challenging, Koenig concedes. "If you look at most of the major players that market a CRM solution right now, their core legacy products are 20 to 30 years old," he says. What's more, many were designed more as electronic Rolodex systems rather than the fully functioning CRM systems available today.

Koenig considers a true CRM platform to be one that handles the sales process and integrates with other tools and systems such as those for call centers, social tracking, and digital marketing campaigns. He notes that a modern CRM system needs to be adaptable and interoperate with other tools.

OSU has planned for growth by deploying Ellucian CRM Advance fundraising software. CRM Advance supports a variety of giving programs through customizable dashboards. "A CRM system lets you control the business workflows so if you're a major gift officer, you see the right things. If you're a gift processing person, you see the right things. Your business workflows make sense."

CRM has many potential uses on campus. "What's really exciting for us are the automated marketing features and the ability to link to professional tools for digital marketing," Koenig says.

Koenig cites the example of the alumni relations department — most do a good job of producing alumni magazines. "The process breaks down in how we deliver those magazines, who gets them, and why they get them. Do alumni choose to get them? Marketing isn't always included in this equation," he explains.

Overall, Koenig looks forward to taking advantage of a modern CRM system. "It allows us to think far more strategically about our data and how we effectively market," he concludes. ■

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A CRM system lets you
control the business
workflows.

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FOSTER PERSONAL, PRODUCTIVE ALUMNI RELATIONS WITH CRM



**JENNY
JONES**

Principal Consultant,
Ellucian

Jenny Jones joined Ellucian from the University of North Carolina Charlotte, where she served as the executive director for Alumni Affairs. From 2008 to 2012, Jenny served as director of Alumni Affairs for the Duke University School of Medicine, and from 2002 to 2008 she served as Duke Medicine's director for Special Events and Donor Relations. Jenny holds a bachelor's degree in secondary education and history and a master's degree in education administration, both from Appalachian State University.



LinkedIn

Before her most recent career as a management consultant to the higher education community, Jenny Jones drove alumni relations at many institutions, including the University of North Carolina Charlotte. Over the years, Jones has seen a marked shift from traditional, broad-based alumni programs such as annual giving campaigns toward greater engagement between the alumnus and the institution.

Fortunately, new technology tools facilitate better information collection, analysis, and updates for both students and for alumni. "The trend toward personalization drives alumni relations," Jones says. "Alumni want to know exactly what they're giving to; how the college or university will use these funds; and how their contribution benefits the institution, student, or faculty member."

Thankfully, colleges and universities can now deploy customer relationship management (CRM) systems designed specifically for higher education. Having the right tools makes it easier for institutions to collect meaningful data and harness it to forge personal connections. "You must figure out how much information you can collect about an individual, and then successfully match that information to his or her interests," Jones recommends. >>>



Alumni want to know exactly what they're giving to; how the college or university will use these funds; and how their contribution benefits the institution, student, or faculty member.



KEY LESSONS

- 1 The more personalization you can create in alumni communications through CRM software, the better the results.
- 2 Engaging alumni with projects that interest them produces more effective results.

FOSTER PERSONAL, PRODUCTIVE ALUMNI RELATIONS WITH CRM

Jones and her peers have discovered that the more you can relate the ongoing developments of the institution to alumni's time on campus, the better and more productive the relationship will be. "You can gather a lot of information to get a larger picture of what the students did and with whom they interacted when they were on campus," she says.

For example, what extracurricular activities did students engage in off campus, and what were their interests? "A graduate may have been an archeology major who traveled abroad and was interested in linguistics. If you know that, you may be able to fund scholarships for students who are studying archeology or linguistics," Jones explains.

Institutions need to be able to pull all those different pieces into a single CRM system, and pinpoint an endowment or scholarship on campus that's a good match for each individual. "Is there a student organization like a Habitat for Humanity chapter that's trying to raise funds? What is it we can send out that the person will open or click on?" says Jones.

Jones acknowledges that getting people to supply personal information after they graduate can be challenging, but believes that if you give something in return for the information, graduates are often receptive. As various IT systems on campus become more integrated, data become more useful and persistent across platforms.

However, many institutions are still in the early stages of their data collection initiatives. "People are so focused on technology like CRM right now because they do not have even the most basic information about their alumni," says Jones. "To get that information, you must make gathering it easy for everyone."

Armed with the right data about current and former students, institutions can more easily make connections between people and programs. This boosts engagement and increases the likelihood for giving. >>>

"People are so focused on technology like CRM right now because they do not have even the most basic information about their alumni."

FOSTER PERSONAL, PRODUCTIVE ALUMNI RELATIONS WITH CRM

Jones also has witnessed a shift in the channels used to communicate with prospects. For example, younger donors tend to be more receptive to social media outreach, text messaging, and email rather than direct mail or phone calls.

Technology eases the process of conducting crowdfunding and micro-funding campaigns. "For smaller institutions, technology is now affordable enough that they can start implementing effective online giving," Jones says. She recommends providing donors with the tools to make smaller online donations and offering incentives to turn those smaller donations into recurring gifts. Noting a Pew Research Center that finds that 87 percent of crowdfunding donors value their personal connection to the projects they support, Jones adds, "The mix of personalization and technology makes online crowd funding possible."

Jones points out that increased awareness of tools for advancement has fostered better collaboration between alumni relations, communications, marketing, and fundraising. Many institutions are integrating the role that advancement professionals play at the highest levels of administration. As advancement technologies and strategies become more sophisticated, institutions need to take advantage of them to raise capital. ■



The most important metric is donor retention. By focusing on donor retention, all other metrics rise. Retained donors give more and give for a lifetime, so rewarding loyalty is essential. If we don't retain donors, they will not grow and influence other donors.



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LYNNE WESTER

Founder, Donor Relations Guru

CRM AND SOCIAL MEDIA PAVE THE WAY FOR SENTIMENT ANALYSIS



THOMAS CHAVES

Associate VP for Development and Alumni Relations, Lehigh University

Thomas Chaves is a higher education IT leader who has more than 25 years of experience in consulting, product management, development, marketing, and management. He is adept at working with internal and external customers to drive new and existing solutions to proper use and effectiveness. Tom has presented on industry trends, market drivers, and technology-based approaches to solving challenges, and he is skilled at using systems to effectively manage the advanced information needs of a university.



LinkedIn

Thomas Chaves oversees a 22-person team and all the technology that supports Lehigh University's advancement operations, including prospect research, campaign management, and reporting and analysis. While Chaves appreciates the customer relationship management (CRM) tools in place to aid his goals, he looks forward to taking advantage of sentiment analysis to propel Lehigh's advancement initiatives in the future.

"We're starting to work with *sentiment analysis*, although from our perspective the technology still isn't entirely usable," Chaves says. Sentiment analysis refers to the process of computationally identifying and categorizing opinions expressed in text to determine whether the writer has a positive, negative, or neutral attitude toward a topic or product. Some people also call this *opinion mining*.

"In higher education, you can more easily get a donation from alumni when you know what they want to donate to," Chaves says. "If you can capture alumni sentiment on social media, for example, you can maximize philanthropic support to your organization. That's the real goal." >>>



If you can capture alumni sentiment on social media, you can maximize philanthropic support to your organization.



KEY LESSONS

- 1 With unrestricted giving on the decline, institutions must learn more about their alumni to better target their philanthropic campaigns.
- 2 Sentiment analysis, which attempts to determine whether a post (usually on social media) is positive, negative, or neutral, can help universities hypertarget donors and improve campaign effectiveness.

CRM AND SOCIAL MEDIA PAVE THE WAY FOR SENTIMENT ANALYSIS

Offering himself as an example, Chaves suggests that if a charity were to figure out from social media that he's a New York Mets fan and has two grandchildren, that charity could likely create a product or offering that capitalizes on those interests. The difficulty lies in wading through all the data to flag what's relevant to that charity, he admits.

"You can get to all the data out there at some level, but you need alerts to notify you when something significant pops up or when a data point meets a threshold — whatever criteria you set," Chaves says. Sentiment analysis will prove its usefulness if it can identify specific alumni for targeted outreach.

Donors' increasing desire to tie giving to their favorite university causes or departments drives the need for more sophisticated CRM tools such as sentiment analysis. "Getting people to give without restrictions is a tough sell," says Chaves. "Our unrestricted results have been pretty flat, but restricted giving keeps climbing. We must figure out how we can tailor an appeal to maximize effectiveness."

Lehigh University has found success in personalizing campaigns through hypersegmentation. "The last couple of years, we've tailored our phoning and mailing to hone in on more specific cohorts based on their past giving and any other data points we can find." Chaves says the institution sees good results from this effort. "We measure that in LYBUNT (Last Year But Unfortunately Not This Year) retention and number of donors. Our retention is on an upward trend, from low 70 percent a few years ago to 74 to 75 percent now. Our donor growth is positive as well, growing about 2 to 3 percent per year over the last few years."

To accomplish such granular targeting, Lehigh maintains a core system of record in its baseline CRM system. "We tap into other data and tie them to that core record to make everything accessible from the university's information management platform," Chaves explains. Integration with several other back-end systems provides a seamless user experience.

Overall, Chaves emphasizes the value of information in driving engagement. "We need to recognize that our relationship with alumni constitutes only a small piece of their lives," Chaves says. "To truly enhance our relationship with alumni, we must understand the rest of their lives." ■

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To truly enhance our
relationship with alumni,
we must understand the
rest of their lives.”



The emphasis on hiring data analysts and using analytic tools has huge potential. That will help nonprofits assess what's working and what isn't, demonstrate their impacts, and focus their efforts.



 |  |  | 
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ROBERT WEINER

President, Robert L. Weiner Consulting

GENERATIONAL CHANGES REQUIRE NEW ADVANCEMENT PRACTICES



**ROBERT
HENRY**

Vice President, Education,
CASE

Robert Henry is vice president of education for the Council for Advancement and Support of Education (CASE), an association that serves educational institutions and advancement professionals. Before joining CASE, Henry was the director of individual giving at Yale University; assistant vice president for the University of Connecticut Foundation; and taught in Africa, Europe, Australia, and South America. He holds a bachelor's degree from Murray State University and a master's degree from Eastern Michigan University.



Website | LinkedIn

With more than 15 years of experience as a development executive, Robert Henry now shares his expertise with other advancement professionals through his work with the Council for Advancement and Support of Education (CASE) association. He advises his members to embrace the latest industry trends by adopting new ways of approaching prospects and interpreting data.

Henry identifies the first trend as creating a culture of philanthropy. This trend stems from concerns about the role the millennial generation will play in future giving. "We know that in the next 8 to 10 years, millennials will make up 45 percent of the workforce," he says, pointing out the tremendous impact millennials will have on the donor base. Millennials tend to reject institutional giving in favor of crowdfunding or direct support to individuals; a cause of concern for many universities.

"How do we target Millennials?" Henry asks. "The answer: Increase engagement. We know that this group wants to have an impact." Matching the campaign to the prospect is critical for engaging millennials. "This audience won't give out of loyalty," he explains. "For our grandparents, education was a privilege, and they gave out of honor. For millennials, education is an expectation." >>>



For our grandparents, education was a privilege, and they gave out of honor. For millennials, education is an expectation.



KEY LESSONS

- 1** The Millennial generation wants to feel a connection to a cause, making it necessary to match donors with specific programs or individuals at the institution.
- 2** As students relate more and more to nontraditional subgroups, institutions must figure out how to engage with them in ways that connect to how they self-identify.

GENERATIONAL CHANGES REQUIRE NEW ADVANCEMENT PRACTICES

The second critical trend concerns diversity, which has recently increased on college campuses. These days, students and alumni identify along lines of race, orientation, religion, and other factors but with more nuance and specificity. “How do we engage these constituents and connect with them in meaningful ways?” Henry posits.

Philanthropy becomes a challenge when students no longer identify along the same lines they once did. “Students today don’t put themselves in the boxes that that my generation did,” Henry says. “Students see diversity as extremely complex. It’s regional, it’s income — it’s all these pieces. Millennials check ‘other’; they don’t fit into neat boxes.” As a result, an alumni relations program for an affinity group won’t necessarily appeal to all members of that group.

Third, universities must gather and assess alumni engagement metrics. “People in the fundraising and philanthropy sphere have done a lot of work on how to track the success of their efforts,” Henry says. “We don’t have such metrics for alumni relations, but CASE is developing them now.”

Finally, Henry likes the trend toward online giving. Although people who give online tend to give less per donation, these donors often sign up for recurring gifts. Therefore, universities must look more at lifelong giving and less at what specific campaigns raise.

“Institutions will have to figure out how to encourage online giving while still providing donors with a feeling of connection,” Henry recommends. “People need to understand the power of those smaller gifts.” ■

“
Institutions will have to figure out how to encourage online giving while still providing donors with a feeling of connection. People need to understand the power of those smaller gifts.
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Section 4: Data and Analytics

We asked: How have you used analytics to address a major issue at a higher ed institution? What did you learn, what metrics were used to measure success, and what was the outcome?



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Across our alliance of 11 public research institutions, we're using predictive analytics to support our mission to produce better degree outcomes for all students regardless of race or generational status. The insights gained from creating a data-savvy culture on campus is helping us redesign our programs and processes so we can personalize how and when we support students in their academic journey.



BRIDGET BURNS

Executive Director, University Innovation Alliance



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THE FIVE BUILDING BLOCKS OF THE ANALYTICS ECOSYSTEM



KAREN A. STOUT

President and CEO,
Achieving the Dream

A nationally regarded community college leader, Dr. Karen Stout has served as president and CEO of Achieving the Dream since July 2015. She was named one of higher education's most innovative leaders in 2016 by *Washington Monthly* magazine. Prior to joining Achieving the Dream, Karen served as president of Montgomery County Community College (Pa.) for more than 14 years.

Technologies such as cloud computing, advanced business intelligence systems, and visual analytics have redefined what community colleges can do with data, how fast they can do it, and how readily they can share and apply it. We have only begun to explore the possibilities, says Dr. Karen A. Stout, president and CEO of Achieving the Dream.

“However, the greatest data and analytics in the world won't have any effect if they don't fuel a decision or change something. That requires a culture—an ecosystem—where everyone involved understands, values, and demands fact-based decisions and strategies.”

Prior to her position with Achieving the Dream, Stout was president of Montgomery County Community College in Pennsylvania. During her 14 years as president there, the college developed an analytics ecosystem. “There were five building blocks to that ecosystem; an ecosystem developed so that you can use analytics to begin to aggregate data. It's a system in which an institution can use qualitative research to look at what it has just aggregated and examine the pain points of the data to develop interventions and solutions. That is a whole process.” >>>



You must have a strong mission that explicitly states that the organization values the use of data in decision making.



KEY LESSONS

- 1** Analytics are only as good as the filter through which you view them, so it's critical to fully understand the problem you're trying to solve.
- 2** Tools and technology are essential to aggregating useful data, but without a culture that believes in the value of analytics, those data will never become actionable information.

THE FIVE BUILDING BLOCKS OF THE ANALYTICS ECOSYSTEM

The first of the five building blocks is *leadership*. Stout says, “From a leadership perspective, you must have a strong mission that explicitly states that the organization values the use of data in decision making. Data inform decision making—it’s something you look for in hiring new staff, that you build a leadership team around. You help members of your board develop those skills, and you commit to helping faculty engage with the data.”

“The second building block is strong *strategic and annual planning systems* that are aligned, that have activities and goals and big ideas connected to mission-centric outcomes,” says Stout. “All kinds of metrics came out that started at an aggregate level but then could be infused into program analytics.” For example, the college used annual program report cards and reviews to see how students were moving through programs to help them adjust and ensure program completion.

“The third building block is *systems and structure* that support an analytics ecosystem. From a structure perspective, that means, how do the Institutional Effectiveness office and the IT office work together in a collaborative way? That success requires collaboration between those areas.” Stout believes that a committed leader must be present. “It’s important to have the leader reporting directly to the president, being part of the decision-making body and really understanding that every decision is about a process and the data implication to it. When colleges are trying to build an analytics culture, they often forget that. You can’t design that culture on the back end of a decision. That work has to happen in parallel with your decision making.” >>>

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You have to look at the
analytics, and then you
have to build structures
and systems to support
what you’re finding from
the analytics.

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THE FIVE BUILDING BLOCKS OF THE ANALYTICS ECOSYSTEM

Technology tools are the fourth building block, Stout adds. “An organization must determine which tools it will be using. From my perspective, selecting the tools requires first an acknowledgement that it’s about disseminating the data in such a way that the IT organization isn’t the gatekeeper of the information; rather, the IT organization helps disseminate the data in ways that are visual, in ways that they can be manipulated so that deans, for example, and others on the ground can make decisions based on their ability to dig into the data on their own.”

Finally, Stout says the fifth building block is *helping people within the institution understand the importance of data*. “It is not just about the importance of data but the importance of pulling insights out of data rather than starting with the data, and then building interventions that may or may not be connected to solving the big problem. You have to look at the analytics, and then you have to build structures and systems to support what you’re finding from the analytics.” ■



BRENT DRAKE


Chief Data Officer,
Purdue University

Brent M. Drake currently serves as the chief data officer overseeing the Office of Institutional Research, Assessment, and Effectiveness at Purdue University, where he focuses on data related to student learning and attainment, overall institutional effectiveness, institutional reporting, faculty activity, and data analytics. He presents and publishes on many topics in higher education, including motivational models related to student success, retention enhancing programs, business intelligence, data analytics, and student success efforts.



Website | LinkedIn

Brent Drake, chief data officer at Purdue University, spends his days using analytics to make students more successful. “One of the major focus areas our office points to is student success. Specifically, we’re looking at students’ academic success, so their grade-point average (GPA), their progression toward their degree, their retention, and ultimately their graduation are the key metrics we look at. We’ve worked on many projects over the past three years that include factors that affect that success—ways we can help move the needle on those metrics so that we can ultimately help more students be successful at the university.”

Currently, Drake says the university is using data to “provide a behavioral nudge for students toward more proactive behaviors. We’re pulling in a large array of data areas: our traditional academic record files, our learning management system, our ID card transactions, and our network log activity at the university.” Drake says, “We can look at malleable behaviors predictive of success on campus, then send messages to the students about them.” 



We can look at malleable behaviors predictive of success on campus, then send messages to the students about them.




KEY LESSONS

- 1 Organizations can use analytics not only to define the so-called “murky middle” students who may or may not succeed but also to push those midlevel students toward success by identifying and fulfilling their needs.
- 2 To be successful, tie analytics to concrete, well-defined goals. When clear outcomes are in place, it becomes easier to see where you want to exert influence.

Purdue also provides information directly to students to help them perform better. Drake explains, “Factors that can help with their success in class, like providing GPA comparisons to students who have been successful in their majors in the past; whether they’re attending class; whether they have a high Internet usage rate while they’re in class, which would imply that they’re not paying attention to the lectures; their tardiness to class; whether they’re logging in to the learning management system proportionately to their class requirements; and whether they’re using the discussion board topics in the class.”

“We provide information about the historical relationship between those behaviors and their ultimate success on campus,” Drake says. “Then, when they log in, they see their individual data points in relation to other students in their course or in their major or across the university.” He believes these programs may play a part in Purdue’s recent retention rate records for one and two years and the record four- and six-year graduation rates the university is setting.

Students find the analytics useful. Drake points out, “Every time we release a new module, we send a follow-up survey to the students. Overwhelmingly, the response is positive. When we ask them, ‘Do you want us to continue to use your data in this manner if it helps you be more successful in your GPA,’ around 90 percent of the students respond yes.” 

“

Every institution can look at its cutoffs, where it has breaks of students who struggle based on GPA at the end of the semester . . . and reach out to those students in an email campaign or have their advisors follow up with them.

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An analytics project of this size might be more than some institutions are prepared for, says Drake, but he encourages, “Every institution can look at its cutoffs, where it has breaks of students who struggle based on GPA at the end of the semester—even if they’re not in academic probation status—and reach out to those students in an email campaign or have their advisors follow up with them. That is an easy pull for any institution. Registration behavior is also an easy pull for just about any institution out there. Colleges and universities can do those things without a heavy investment of time and resources, and it will have an impact on their student body.”

Learning from the programs that Purdue has instituted, Drake advises, “At the beginning of the process, you’ve got to be clear about which outcomes or metrics are of interest and on which you want to exert influence. Then, everything can flow from that in terms of looking at the resources, behavior, and technologies that can influence that goal. You’ve got to get that first step done.” ■



We've always had data, but it hasn't been easy to put together. Now we've moved to an era where we're using analytics to help student success and put students' needs at the center.



DIANA OBLINGER

President Emeritus, EDUCAUSE

ADOPT A FLEXIBLE APPROACH TO GLEAN VALUE FROM DATA



**PATTY
PATRIA**

**Vice President for
Information Technology,
Becker College**

Patty Patria is the vice president for Information Technology at Becker College. She has more than 20 years of experience in the IT industry, more than 15 of which are in higher education. She is responsible for providing strategic leadership in long- and short-term planning; managing administrative and academic technology; overseeing the Becker libraries; and overseeing the management of computer networks, servers, and personal computers. Patty also oversees information security and compliance requirements for the College.



LinkedIn

Patty Patria, vice president of Information Technology at Becker College, says, “We use analytics to help us more accurately forecast and target new student enrollment as well as improve retention.” In the past, Patria says her institution built homegrown dashboards in Microsoft Excel based on data extracted from their recruitment and student information systems.

“Last year, we for the first time tried to create a predictive analytics model to help us forecast which students would be an ideal fit for Becker by leveraging a small team of in-house personnel.”

“It didn’t work out so well,” Patria admits. “Our predictive model wasn’t all that accurate, but that’s OK. We have the philosophy that it’s OK to try and fail as long as it doesn’t negatively impact business.” Rather than staying with something that doesn’t work, this year Becker College is taking a different approach. >>>

“The technology for analytics changes drastically, so you must continually make sure that you're refreshing that technology.”

KEY LESSONS

- 1** Maintain a flexible approach to using analytics in the institution. If there are potential benefits to trying a new approach or technology, then try it. If it doesn’t work, try something new.
- 2** Cloud-based technologies, like data warehousing and analytics, allow smaller institutions to employ strategies that have previously been used only by large institutions with large budgets and access to additional staff.

ADOPT A FLEXIBLE APPROACH TO GLEAN VALUE FROM DATA

Patria explains, "Instead of just focusing on the predictive models, we are looking at a comprehensive approach to enrollment management. Again, we formed a small team comprised of enrollment, marketing, and IT staff to evaluate multiple options, and then develop a new strategy. This year, our goal is to work with vendors that are experts in this space to help us run predictive models on potential students prior to us engaging them so that we have a better sense of which lead would actually turn into a student who enrolls. We're also trying to use marketing analytics and social media marketing to come up with new mechanisms by which we can target the prospective students that we've analyzed to see if the outcomes increase the number of students who enroll."

Patria's "let's try it" approach to analytics seems to work well with the evolving nature of technology and the capabilities available to institutions today. "The technology for analytics changes drastically, so you must continually make sure that you're refreshing that technology."

For example, one application the college used last year required a lot of hand-coding, which can be time consuming. The tools it uses today are much different. "Artificial intelligence engines that used to require coding now have drag-and-drop functionality in a graphical user interface; that makes generating predictive models much easier. You don't necessarily need the detail-oriented programmer skill set," she explains. "I think it's important to stay on top of the evolution of the tools in this market because they're changing so rapidly. This approach can change the way you run your analytics." >>>

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Our enrollment has increased every year for the past five years. . . . I think we're in that position because we continually look at the analytics, make decisions, and then make adjustments based on those decisions.

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ADOPT A FLEXIBLE APPROACH TO GLEAN VALUE FROM DATA

Cloud computing has also helped make analytics accessible to more colleges and universities. “The cloud is helping institutions expand the way they interact with data,” she says. “Many larger schools have their own custom-built data warehouses and dashboards, but those tools require a large staff, which in turn equates to a large budget. For smaller schools with tighter budgets, haven’t been able to get into the data warehouse market yet because the costs were too high or the tools weren’t available.”

“As we move more to the cloud, the whole data warehouse market seems to be changing, as well. It used to take anywhere from 12 to 24 months to set up the data warehouse. Nobody has the appetite to wait that long anymore. Technology advances will enable more smaller institutions to access real data warehouse and dashboarding tools,” Patria says.

The use of cutting-edge analytics and cloud computing technologies is paying off for smaller schools. “Our enrollment has increased every year for the past five years, so I would say that we’re in a better position than a lot of other small private colleges,” Patria says. “I think we’re in that position because we continually look at the analytics, make decisions, and then make adjustments based on those decisions.” ■

HOW ANALYTICS CAN IMPROVE STUDENT ASSESSMENT AND SUCCESS



**SUSAN
GRAJEK**

**Vice President, Communities
and Research,
EDUCAUSE**

Susan Grajek is EDUCAUSE's vice president for Communities and Research. She is responsible for research, benchmarking, and analytics programs and for formal and informal communities of practice. Before joining EDUCAUSE, she spent over 25 years at Yale University in a range of IT management and leadership positions. Grajek holds a Ph.D. in psychology from Yale.



Website | LinkedIn

In her role as the executive responsible for all research, benchmarking, and analytics at EDUCAUSE, a nonprofit association and community of IT leaders committed to advancing higher education, Susan Grajek tracks the impact of technology on higher education. Lately, she has seen encouraging results in the use of analytics to further student assessment and advising.

“Student success is where I see a lot of interest and activity in applied analytics,” she says. “We’ve mainly focused on using analytics and technology to rethink, reframe, and re-architect the student advising process.” Much of the funding for this research comes from the Bill and Melinda Gates Foundation.

EDUCAUSE has explored technologies that enable institutions to help advise students and map their education. “If you think like a student,” says Grajek, “success comes from answering questions such as, ‘Do I have a plan for my education, or am I just winging it semester to semester?’ >>>



Student success is where I see a lot of interest and activity in applied analytics. We've mainly focused on using analytics and technology to rethink, reframe, and re-architect the student advising process.



KEY LESSONS

- 1** Predictive analytics can directly affect student success but require a clear, upfront strategy and the right institutional infrastructure.
- 2** Analytics can help identify student patterns that may lead them into difficulties and prompt intervention.

HOW ANALYTICS CAN IMPROVE STUDENT ASSESSMENT AND SUCCESS

Do I have a major, and do I understand the requirements are for that major? Have I created a plan for attaining those requirements? Am I on track in a particular course or with my plan to graduate in an affordable timespan? What can I do if I'm not?"

These are big questions, and no single analytics technology can address them. However, Grajek points out that the first steps to gaining insights from data have less to do with specific technology and are more about institutional readiness, how it collects data, how its systems talk to each other, and whether it has a clearly defined strategy.

"We try to be agnostic about platforms and technology specifics because what works for one institution won't necessarily work for another," says Grajek. "Sometimes that has to do with the institution's specific aims and specific focus areas or simply what its current architecture can handle. Some institutions want to buy off-the-shelf, turnkey solutions; others want to create their own analytics infrastructure that enables them to develop and manage their own algorithms."

One thing most colleges and universities can agree on, however, is how they measure success. "The most common metric that institutions seem to use to judge whether they're having success is the student completion rate or the persistence rate." >>

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I think technology should always be in the service of strategy. Make sure that you've got the people and the process, the investment, the policies, the understanding of the outcomes you want to achieve in place before you start looking at technologies.

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HOW ANALYTICS CAN IMPROVE STUDENT ASSESSMENT AND SUCCESS

Grajek cites two recent examples of institutions that apply analytics to improve these metrics:

- Middle Tennessee State University (MTSU) launched a predictive analytics platform a couple of years ago. Earlier this year, MTSU saw a three-percentage-point increase in first-year student retention. That increase enabled the university to achieve the highest retention rate for new freshmen in 15 years. MTSU directly attributes this achievement to the technology. (See Page 15 for more details.)
- Montgomery County (Pa.) Community College has been working on using analytics for student success for three years. The college has developed a student success network that includes a system of early alerts. Based on student performance data and various associated behaviors, the system can identify at-risk students. Advisors and students then receive alerts about actions they should take. The system includes a dashboard that students and advisors can log in to. There, they see financial aid information, the college's learning management system, assignments due, and any early alerts—all in one view.

Grajek views the use of analytics to improve student success as an *emerging* best practice.

"I think that a lot of institutions are in denial about that and they are underinvesting," she says. "My big concern is that folks often think the way to solve a challenge like this is to start with the technology. I think technology should always be in the service of strategy. Make sure that you've got the people and the process, the investment, the policies, the understanding of the outcomes you want to achieve in place before you start looking at technologies. And recognize that, because this area is still emerging, today's investments will probably have a short shelf life." ■



Business analytics tools, especially predictive analytics, provide the opportunity to monitor success indicators for individual students, instead of just aggregate metrics for all students. Leading indicators such as class attendance and LMS participation provide the opportunity for early engagement with that student to facilitate the changes necessary for student success.



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HENRY DEVRIES

Management Consultant, Principal, Ellucian

Section 5: Talent Management

We asked: How have you used technology to attract, develop, and retain the best talent in higher education? Please provide specific examples of what you learned.

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THE FUTURE DEMANDS TECHNOLOGICAL MUSCLE



**TINA
WOODARD**

CEO,
Capstone Performance
Solutions

Dr. Tina Woodard has 20 years of experience in the higher education, nonprofit, and government sectors. She worked as an executive leader in higher education where she directed organizational development and strategic talent management for more than 40,000 employees for eight years. She holds a B.S. degree in industrial engineering, a Master of Human Resource Development degree, and a doctorate in adult education. Her research focuses on strategic talent management.



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Tina Woodard, CEO of Capstone Performance Solutions, knows what it takes to build an effective talent management system. As the assistant vice chancellor for organizational development in higher education, she was tasked with helping bring together 35 public colleges on a single technology platform for learning and development. The university system learned that having disparate employee learning management processes and systems was inefficient, so the focus of its efforts shifted to integrated talent management. “All institutions will be on one platform for benefits and payroll administration as well as the talent management and learning management solution.”

Integrating the talent management system has helped in numerous ways, says Woodard. “It was important to automate all our processes because we were using disjointed systems. The systems weren’t talking to us.” They also weren’t talking to each other, making it difficult to communicate about job openings across the organization. With more than 42,000 employees, that meant a lot of needs were going unmet. >>>



We found that e-learning was a way we could continue supporting employees’ learning, development, and performance management.



KEY LESSONS

- 1 Disparate talent management systems across a large or state-wide institution leave gaps in talent management that can be filled by instituting a single, integrated talent management system.
- 2 Communications are improved across all aspects of talent management, including employee recruitment, engagement, and retention, when a talent management system works across all facets of an institution or education system.

THE FUTURE DEMANDS TECHNOLOGICAL MUSCLE

The learning management solution is an important aspect of the platform, says Woodard, because it's "how we deliver learning and professional development to our employees. One of the reasons my position was established eight years ago was that at the time we had 35 institutions, and only about 40 percent of those institutions had robust learning and professional development and leadership development programs."

Woodard said that there were huge leadership gaps in the system, and that missing element was contributing to low employee-retention rates. "We recognized that employees were experiencing challenges in attending learning and development programs—even simple things like getting released from their jobs to attend face-to-face training. We found that e-learning was a way we could continue supporting their learning, development, and performance management."

Woodard says the move has helped increase employee retention and—perhaps more importantly—employee engagement. "We believe that if our employees are more engaged, then we're going to retain them longer than we would otherwise." Creating this engagement by implementing a learning management system resulted in a culture change around performance management, too. "We had to educate and make our employees aware of the e-learning resources as well as do the work to influence managers to utilize the system."

"Integrated talent management processes make everything easier," says Woodard, "especially if employees have a single sign-on they can use to access the information they need. It makes all our processes more efficient, and efficiency is what we need in the fast-paced environment in which we work." ■



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Integrated talent
management processes
make everything easier.
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TECHNOLOGY IS THE ENABLER, NOT THE DRIVER



ANDY BRANTLEY

President and CEO,
College and University
Professional Association for
Human Resources (CUPA-HR)

Andy Brantley has served as president and chief executive officer of CUPA-HR since July 2005. During his tenure, the association has grown from 1,500 member institutions to almost 2,000 and from 6,600 institutional representatives to more than 22,000. Before CUPA HR, Andy worked for 17 years in higher education, serving as associate vice president and chief human resources (HR) officer at the University of Georgia, director of HR at Davidson College, and director of HR at the University of North Carolina at Asheville.



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“It is important to understand that technology is the enabler, not the driver,” says Andy Brantley, president and chief executive officer of the College and University Professional Association for Human Resources (CUPA-HR). “An organization must create and sustain a brand that means something, and the employees of that organization must feel that they are a part of creating and sustaining that brand.”

“As higher education organizations, we must connect our brand to our academic missions and the student experience,” Brantley explains. “We must also connect our brand to the employee experience and opportunities we create—how we acknowledge and reward great work and how we manage and hold accountable those employees who are marginal performers.”

Assuming that these elements are in place at an organizational level, Brantley says that technology can be a significant tool for recruiting and retention. “Recruiting is an ongoing priority. Most institutions thankfully have online solutions that applicants can use to submit their information.” Brantley suggests going deeper than just having online solutions available, however. “At CUPA-HR, we don’t just describe the position, we describe the culture and the collaborative, collegial working environment.” >>>



As higher education organizations, we must connect our brand to our academic missions and the student experience. We must also connect our brand to the employee experience and opportunities we create.



KEY LESSONS

- 1 Tapping technology to attract, develop, and retain talent must be part of the core organizational culture. If it is optional, it won’t be used to its fullest extent.
- 2 Employees pay attention to where institutions invest their time and budget, and they choose organizations with the right technologies available to help them succeed and grow in their positions.

TECHNOLOGY IS THE ENABLER, NOT THE DRIVER

“When you click **About us** on our website, you clearly see who we are, including our core values and ethics and our commitment to diversity and inclusion. These aren’t just programs and services: They are core elements of who we are.” According to Brantley, that complete picture is important because it sets the tone for attracting and retaining talent that fits well with your organization.

Next, Brantley says, “Talent development has to include ongoing learning related to technology. It is not OK for someone to avoid training that helps him or her better use the tools available, whether they be periodic Microsoft Word, Excel or Outlook training or an introduction to project management software. This type of ongoing learning is not optional: It is essential.” One way CUPA-HR handles such training is through online webinars. A recent webinar had more than 1,400 sites logged in and 4,000 to 5,000 participants. “Our webinars last an hour and cover just-in-time compliance topics and leadership-development topics. Anyone who says that he or she doesn’t have time to regularly carve out an hour to log in to a free webinar is probably not the type of person you want in your organization.”

Education and training are part of employee retention, but Brantley suggests that another element employees notice is an organization that is willing to invest in talent. “There will always be budget constraints for most higher education institutions,” he says, “but our employees must see that we are committed to giving them the tools they need to do their jobs and help us advance the institution. Employees see what institutions fund and what they choose not to fund or to delay funding.” Brantley says that automating mundane tasks such as forms processing and filing documents frees up workers to focus on more rewarding work.

“Many institutions have implemented workflow solutions that have totally transformed campus processes,” he continues. “Technology is the enabler, not the driver. Everything is truly an evolution. You continue to build and do what you do: Never rest on your laurels. It’s the ongoing commitment to improvement and to those who work with you in terms of their development and their engagement in all the things you do.” ■

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Many institutions have implemented workflow solutions that have totally transformed campus processes. Technology is the enabler, not the driver.
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Having an active candidate relationship management system to nurture referral candidates is very much akin to the same techniques we use to attract and retain our student populations. Additionally, a well-thought-out onboarding experience maintains excitement and creates the jumpstart that many seek.



Twitter

MIKE BOLLINGER

Global Associate Vice President of Thought Leadership and Advisory Services, Cornerstone OnDemand

BEST PRACTICES FOR ATTRACTING AND RETAINING TOP TALENT



DEBORAH BENTON

Employee Relations Manager,
HRIS, Learning &
Professional Development,
Tulsa Community College

Deborah Benton, MBA, SHRM-CP, PHR, served at the chapter and regional levels as well as two terms on the National Board of Directors for the College and University Professional Association for Human Resources (CUPA-HR). She represented CUPA-HR at the London 2012 Universities Human Resources conference. For the past 21 years at Tulsa Community College, Deborah's HR expertise includes employee relations, HR information systems, and learning and professional development.



Twitter

Long-time instructor and human resources (HR) program administrator Deborah Benton believes a successful HR system must look at the whole person—his or her career, compensation package, benefits, leave, education, family, and the various life stages and changes along life's path. Because career is central and impactful, it is essential, says Benton, that good two-way communication take place throughout the hiring process and day-to-day work.

"We have to do a better job of communicating," says Benton. "When I've been involved in implementing new talent management systems, I've always thought that it was important to communicate more frequently so applicants and existing employees can understand, 'I've done this much. I have this much to go, and I should have an answer by this time.' That sort of feedback is what people are looking for today. They want answers and they want them quickly—or at least they want to know when they're going to get them." >>>



I've always thought that it was important to communicate more often so that applicants and existing employees can understand, "I've done this much. I have this much to go, and I should have an answer by this time."



KEY LESSONS

- 1 Used correctly, technology can make the recruitment and management of talent much more personal.
- 2 Learning isn't just a teacher-student process, it's a holistic effort that brings out the best in everyone. A good process paired with technology allows us to see patterns and implement changes that encourage better results every step of the way.

BEST PRACTICES FOR ATTRACTING AND RETAINING TOP TALENT

Benton believes that this communication should be highly personal when possible, something that technology has facilitated. "There has to be a response loop, with a contact name and phone number if people have additional questions," says Benton. "There's no way you can answer every question every individual would have, but if we collect those questions over time, we get an idea of what we need to provide up front via technology to save time on both ends."

Taking a more personal approach to talent management and building tools such as a database of answers is much easier today, thanks to technology, which at the most basic level allows us to collect and compare vast amounts of data and automate routine processes. "I've been here 21 years. In the past, we were happy to get a pay stub in the mail, which we had to wait for," says Benton. "We all filled out our timesheets by hand, and our Social Security numbers were prominently displayed: It's like we were using a hammer and chisel on stone compared to what we can do using technology today."

"With every iteration of the portals we use for HR, we're able to provide faster yet more accurate information," says Benton. "Typically, in the past, information we provided was easily outdated by the time it got where it was needed." That isn't the case now, and with appropriate access to controls and safeguards, HR information can be used not just to address immediate and specific issues an employee may have but also for administrators to see patterns and implement both subtle and broad changes. >>>

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With every iteration of
the portals we use for
HR, we're able to provide
faster and more accurate
information.
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BEST PRACTICES FOR ATTRACTING AND RETAINING TOP TALENT

It is perhaps most important, says Benton, for everyone to remember that higher education has to retain people who can nurture students. That means that “most of the people who work in higher education love to learn,” says Benton. “Teachers are lifetime learners and always trying to discover more about each other and about what would be most effective for students.”

Benton’s own institution, Tulsa Community College, has recently undergone some significant changes thanks to the arrival of a new president. Benton can attest to how high-quality HR technology can keep everyone focused on specifics and makes for more predictable, more equitable, and more considered change. Given the high costs associated with bringing new employees on board, advanced technology and the improved communication it provides could turn out to be the best possible retention tool. Benton believes strongly that easy and rapid access to information about their employment status or to answer questions, ongoing automatic updates from the system, and better dialog between employer and employee make for a much more productive and fulfilling work environment.

In addition, for Benton’s employer, technology has improved coordination and consistency among numerous geographical campus locations, which translates into better talent management and more precise recruiting. Currently, for example, the entire performance review process has been being overhauled to provide stronger feedback tied to continuing education, which is required of many employees.

“A training and development schematic has to be more than a good idea and just an item that gets a check mark,” says Benton. “It has to help employees feel fulfilled. It should be a pathway for them to grow their career and become more engaged with helping students learn. We are building a system that does just that.” ■

HOW TECHNOLOGY UNIFIES RECRUITMENT AND RETENTION



**EDNA
CHUN**

Chief Learning Officer,
HigherEd Talent

Dr. Edna B. Chun is an education leader and award-winning author who has more than two decades of strategic human resources and diversity leadership experience in public higher education. She has co-written eight books and numerous journal articles and is a sought-after keynote and plenary speaker on talent and diversity strategy. Recognized twice with the College and University Professional Association's prestigious Kathryn G. Hansen publication award, she was also a silver medal recipient of the 2014 Axiom Best Business Books award.



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Talent management, like everything else, has changed over the past few decades, according to Dr. Edna Chun, chief learning officer at HigherEd Talent. "About two decades ago, we began to have access to systems that would enable us to market the institution as an employer of choice and transform all our paper-based operations into online documents and application forms, simplifying the process." Even so, Chun says that using technology for talent management has been slower to catch on in higher education.

"At first, some departments were reluctant to use the technology because they felt it would discourage applicants. There were a lot of barriers to overcome to get the technology into the faculty pipeline, and I would guess that there are still some institutions that don't use technology to hire people, although they're diminishing in number," she says.

For organizations that currently do use technology to attract, develop, and retain employees, Chun says that those technologies now have additional useful facets, "such as a comprehensive module for job descriptions, which then could be aligned with recruitment process and used for existing job descriptions as well as when you're recruiting." >>>



Technology offers infinite potential for almost every HR function.



KEY LESSONS

1 Although recruitment technology has been slow to catch on in higher education, those who use it find they can tie all aspects of employment— attracting, development, retention—into a complete process for employee management.

2 Recruitment technology is continually evolving and offers solutions that have not been previously available in higher education.

HOW TECHNOLOGY UNIFIES RECRUITMENT AND RETENTION

Technology can even be used to conduct performance evaluations, “where all these things could be tied together so you’d have all the aspects of evaluation, recruitment and hiring, and classification and compensation on a single platform. Then, you could also work with learning management platforms for educational processes and complete the full circle of employee processes. Technology offers infinite potential for almost every human resources (HR) function.”

Chun does have one warning. “One of the dangers I’ve seen over the years is that you build dependence on technology for dealing with HR issues. It can be monolithic. In one sense, that can preclude thoughtful review and really considering the talent proposition.”

To overcome the risk of being blinded by technology, Chun says institutions should ask themselves, “What does the institution need, how does it attract that, how can it be flexible about things in this rapidly changing environment?” She suggests that organizations use the technologies but also invest in the dynamic side. Sometimes, technology can put you a bit in a box if you don’t have a way to invest in the qualitative or dynamic side of recruiting. “How you deploy your technology is critical.”

Despite her cautions, Chun says that technology can help organizations attract some of the best and brightest minds. “I think that technology, because it is continually evolving, may offer us new solutions and new ways of viewing it. We’ve already gotten ourselves into a pattern of using what’s out there now. When we move to the next level, we may need to think about ways that enable us to differentiate our institutions from each other in terms of their mission, goals, and talent flow so that they don’t use a cookie cutter approach—where we don’t simply copy an approach used elsewhere—but really think about what we are trying to accomplish and use technology as a means to that end.” ■

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technology is critical.*
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