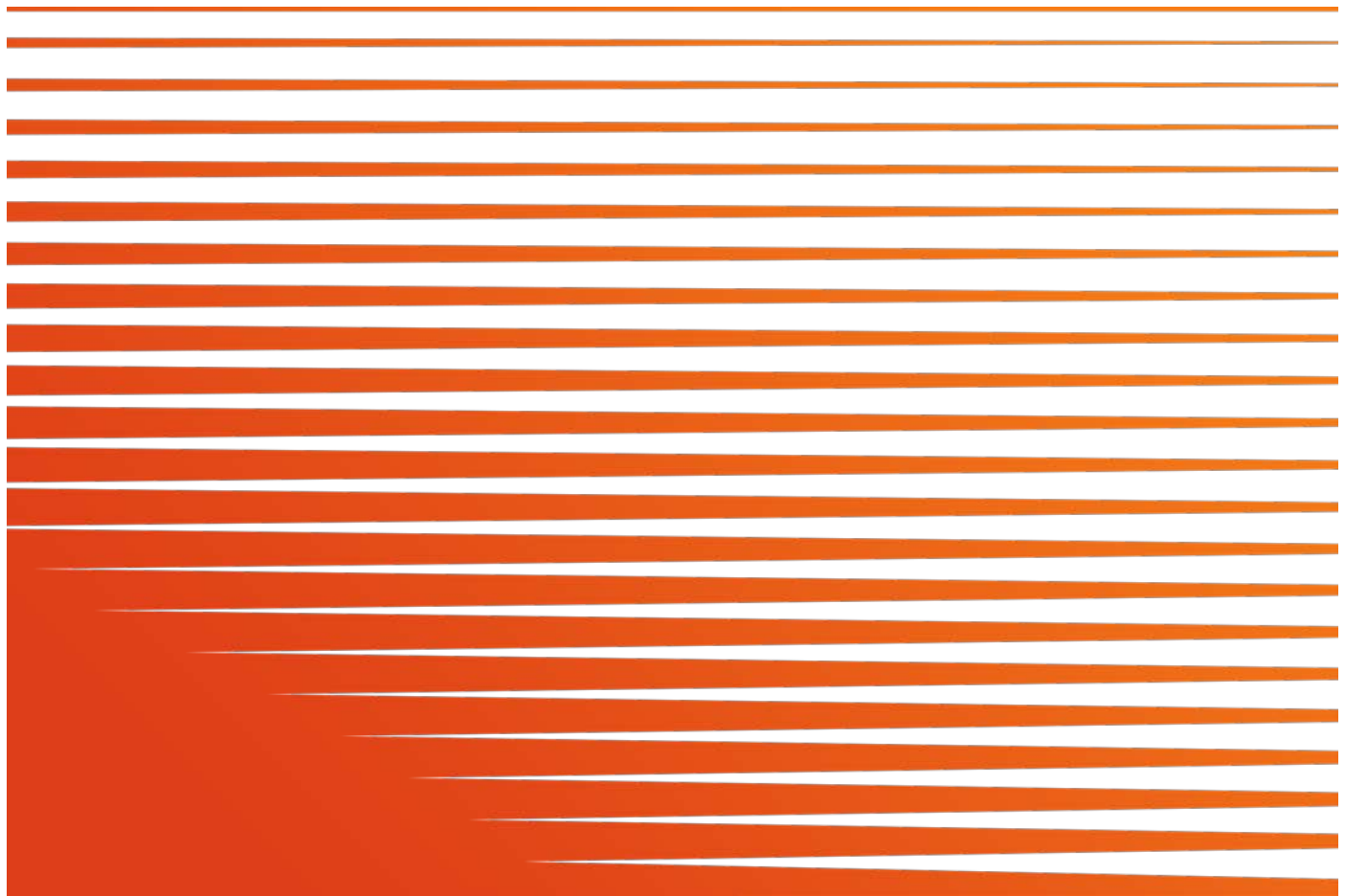


Accelerating Advising Technology Implementation in Response to COVID-19

A Case Study of Jacksonville University

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Introduction

Advising undergraduate students on how to succeed in their academics, careers, and life is one of the most common practices in higher education.¹ Advising is also something that many institutions struggle to resource or coordinate sufficiently, potentially leaving students without needed support on their paths to successful program completion.² It is also important to note that barriers to a successful college experience are not borne equally across higher education. The institutions that serve the highest proportions of students from low-income backgrounds, Black, Latinx, Native American, and Asian/Pacific Islander students, first generation students, and community college students, among other groups, are often under-resourced,³ making the implementation of effective and efficient advising even more vital.

To help address these inequities, many institutions turn to technology to support the faculty, staff, and students engaged in the advising process.⁴ This technology, or technologies, can help manage caseloads, identify students labeled “at risk” of not completing, or empower students with more information to control their academic journey. Advising technologies allow institutions to collect more data, as well as more efficiently disaggregate that data, to interrogate and respond to differential outcomes experienced by minoritized groups. While the possibilities for using technology to help advise students have grown dramatically over the past several decades,⁵ the implementation of such systems often fail to live up to their promise.⁶ The reasons for such disappointments are as numerous as there are institutions, and often include some combination of insufficient planning and/or resources, challenges to internal communication, competing initiatives, technological challenges, or using the wrong technology for a specific need.

Despite these challenges, some institutions have found success, easing the work of advisors and better supporting students in achieving their goals. While many factors can contribute to a successful implementation, the role that stakeholders play in that process has not been well understood. To help address this gap in the literature and provide additional resources to institutions, Ithaka S+R and EDUCAUSE are developing a series of case studies on successful advising technology implementations across the United States that will culminate in a final

¹ Gates Bryant, Jeff Seaman, Nicholas Java, and Kathryn Martin, “Driving Toward a Degree: The Evolution of Academic Advising in Higher Education: Part 2: The Supplier Landscape,” Tyton Partners, 2017.

² Gates Bryant, Jeff Seaman, Nicholas Java, and Kathryn Martin, “Driving Toward a Degree: The Evolution of Academic Advising in Higher Education: Part 1: State of the Academic Advising Field,” Tyton Partners, 2017.

³ Kery Murakami, “Racial Equity in Funding for Higher Ed,” *Inside Higher Ed*, 29 October 2020, <https://www.insidehighered.com/news/2020/10/29/racial-disparities-higher-education-funding-could-widen-during-economic-downturn>.

⁴ George E. Steele, “Student Success: Academic Advising, Student Learning Data, and Technology,” *New Directions for Higher Education*, no. 184, 2018.

⁵ Gates Bryant, Jeff Seaman, Nicholas Java, and Michael Chiaro, “Driving Toward a Degree: The Evolution of Academic Advising in Higher Education: Part 2: Supplier Landscape,” Tyton Partners, 2019.

⁶ Alexander Mayer, Hoori Santikian Kalamkarian, Benjamin Cohen, Lauren Pellegrino, Melissa Boynton, and Edith Yang, “Integrating Technology and Advising: Studying Enhancements to Colleges’ iPASS Practices,” MDRC, 2019.

cross-case analysis report that highlights best practices and strategies in implementing advising technology across these participating institutions.

In order to hear from a diverse collection of institutions, we sought to engage with dozens of institutions across the United States who had successfully implemented an advising technology, whether a “home grown” system or a vended product. Both Ithaka S+R and EDUCAUSE invited institutions they worked with in the past on advising-related projects and also made open calls for participants. This research brief presents our initial study of Jacksonville University’s successful implementation of Starfish,⁷ the advising technology they implemented in order to organize and systematize the process of student advising, support, and follow-up. More information on this larger initiative and information on getting involved is available on Ithaka S+R’s website.⁸

Jacksonville University

Recently, Jacksonville University (JU), a private university located in Jacksonville, Florida, had a particularly successful advising technology implementation that sheds light on how different stakeholders can shape such a process. We spoke with several of the central figures in their implementation process to learn more, including administrators, faculty, and students. Their implementation began in June 2020 and was fully online by the start of the fall 2020 term; a remarkable feat in a field where months of planning, piloting, and politicking is the norm. Such a rapid pace was possible due to a number of factors, perhaps none more pressing than the COVID-19 pandemic.

JU had a face-to-face advising structure where freshmen and sophomores were supported by professional advisors and juniors and seniors were supported by faculty advisors. Prior to adopting Starfish, the infrastructure enabling this process was largely siloed and ad hoc, depending heavily on the student information system (SIS) for registration planning and on local Google Docs or Microsoft Word for advisors to make notes on student progress or document their concerns. The status of students was functionally hidden unless their progress was at risk and the student success and retention committee became involved. The process was highly reactive rather than proactive, mobilizing only after an obstacle to a student’s success had already blocked their progress. In addition, when this system raised issues about students, there was no way of following up to ensure they were subsequently resolved.

When the COVID-19 pandemic hit in spring 2020 and students left campus following spring break, there was a sense among those well-versed in the institution’s student information system (SIS), including leaders in the student success and analytics areas, that the university was unable to coordinate student success efforts, especially remotely, due to a lack of systems in place. The recently formed student success and retention committee, a cross-functional group of faculty and administrators largely tasked with addressing retention, was reviewing a number of

⁷ See <https://www.hobsons.com/solution/starfish/>.

⁸ Michael Fried and Christy McDaniel, “Academic Advising Technologies in the Era of COVID-19 and Beyond: Exploring the Human Element,” Ithaka S+R, 30 July 2020, <https://sr.ithaka.org/blog/academic-advising-technologies-in-the-era-of-covid-19-and-beyond/>.

technology options, but had not yet felt an urgency to select a system. The predicted enrollment uncertainty for the fall 2020 term created by the COVID-19 pandemic underscored the need for a more transparent advising process that connected everyone involved in supporting students, including advisors and instructors, in order to better support and retain all students. This priority exponentially accelerated JU's implementation of a technology platform to facilitate this new integrated approach.

Below, we briefly describe the role that different key stakeholders played in contributing to the successful implementation of the new advising technology at JU. The key stakeholders are those individuals who played unique and/or specific roles in the implementation and directly contributed to the success of the implementation. Some stakeholder roles are tied to the individual's role at the institution, such as representing a specific constituency or having particular job responsibilities. Other stakeholder roles are more related to the formal and informal tasks undertaken by the individual in the implementation process, and are more about social connection and influence.

Key Stakeholders at Jacksonville University

By the summer of 2020 and in response to concerns about retention and student success during the COVID-19 pandemic, the senior university leadership invested the necessary resources in better supporting students during this unprecedented time. They allocated funds to the implementation effort and empowered others to take swift action to bring an advising technology to campus. That prioritization exemplifies one of the key stakeholder roles in successful implementations, the **senior sponsor(s)**. The specific position this person, or group, holds may vary depending on the institution, but the role they serve in setting institutional priorities around student success and allocating resources is essential to a successful implementation.

Although the COVID-19 pandemic created urgency around the need for an advising technology that sparked the full implementation, the groundwork for the change that such an implementation would represent had been laid previously by another key stakeholder, the **evangelist**—someone with deep familiarity with advising technologies who brings that information into the institutional community. At JU, this was Aimee Lewin, who joined the university two years prior as a director within Student Affairs. In this position, Lewin oversaw a “catch-all” office with case management responsibilities specifically working with students on academic probation. She brought with her experience using technology to support case management, she first introduced the potential benefits of advising technology during her interview for the position. After six months, she was able to begin sharing formal proposals with other administrators focused on advising and student success.

One of the recipients of those proposals was Will Miller. As executive director of institutional analytics, effectiveness, and strategic planning, he is responsible for gathering, analyzing, and presenting data to better student and institutional outcomes. He took up the key stakeholder role of **change champion**, the individual who leads the cultural, technical, and procedural

transitions required for a successful technology implementation. This role is pivotal as the central hub of communication and promotion among key stakeholders and constituencies, facilitating coordination between information technology specialists, advisors, faculty members, and others with a vested interest in the success of the advising endeavor. Since an advising technology implementation is at its core an organizational and cultural change initiative, it requires someone to make meaning for the community. The change champion often serves as the chair or convener for the institution's implementation committee – the central coordinating body for the implementation. At JU, this group began not with an explicit mandate to implement an advising technology, but as a student success committee focused on examining first-year student retention data and identifying possible solutions. The committee included representatives from several key constituencies, including members of the **faculty** and an undergraduate **student**, and was co-led by the assistant vice president of student experience.

A sub-committee of the student success committee began looking at potential technologies to understand and monitor outreach from faculty members or staff to struggling students. At the time, Starfish stood out to Erik DeCicco, a sub-committee and faculty member, who was also chair of the university's faculty student-life committee and responsible for advising upperclassmen in his program. His enthusiasm about its potential made him an effective **cheerleader** for the platform, another key stakeholder role that works to convince members of a specific constituency to embrace the change.

As is the case at many institutions, the faculty at JU take shared governance very seriously, so the involvement of a faculty colleague at the genesis of the implementation process went a long way to ameliorate friction from another kind of stakeholder, the **resistor**. Despite the resistance to the advising technology implementation that their name suggests, the resistor is a key stakeholder to engage as they will actively work to undermine the success of the implementation. Identifying the root of their resistance to the change can be essential to smoothing the path to success.

In addition to faculty, students are another constituency essential to a successful advising technology implementation. Their ability to become resisters is limited due to their relative lack of institutional power, but their ultimate engagement with the advising platform is absolutely essential when there is a student-facing component to the technology. That importance is what made the inclusion of one undergraduate student on the implementation committee so critical. She was able to serve as an **ambassador** from the student body, advising other stakeholders on how best to engage and communicate with an essential constituency, in this case, the student body.

Lastly, Mandy Baker served as a project consultant and liaison to the implementation committee from the technology vendor. The expertise about the technology platform and experience in previous implementations that she brought allowed her to serve in the key stakeholder role of the **adept**. The adept is highly influential in the success of an implementation due to their expertise with the technology. The recognition of that expertise by others involved in the implementation process can facilitate decision-making and consensus building.

Accelerated Success

A typical Starfish implementation takes about 20 weeks from the initial engagement, but JU was able to *successfully* complete its implementation in a scant six weeks. Several factors contributed to the institution's ability to reach this milestone so quickly. One such factor was the enrollment and retention uncertainties created by the COVID-19 pandemic, which heightened the need to increase efficacy and efficiency throughout the institution. The senior sponsors were particularly amenable to investing resources in the proposals from other stakeholders for a system that could help coordinate support for student success efforts.

Another factor easing the way for a fast implementation was the largely ad hoc way faculty members and staff were engaged in the advising process prior to the implementation. JU was able to develop new processes aligned with the capabilities and features of the Starfish system without needing to mold the technology to match an existing and entrenched advising process. While some members of the faculty were slow to accept this change—especially in the midst of so much pandemic-related change and the adoption of new technology for remote teaching—there were no active resisters with vested interests in how advising had been managed previously.

The relatively small size of the institution also allowed for more stakeholders and constituencies to be directly involved in the implementation process. The main implementation committee, led by the change champion, consisted of several principal leaders from the various constituencies as well as administrators whose roles involved cross-functional coordination. This membership configuration, much more difficult to achieve at a larger institution, allowed choices to be made quickly and decisively.

Conclusion

After considering adding a technology solution to advising, case management, and student success for several years, uncertainties created by the COVID-19 pandemic prompted JU not only to decide to invest in the Starfish system, but also to do so at record speed. Thanks to a combination of essential stakeholders in key implementation roles, the entire institution went from siloed advising information kept in local systems to a campus-wide system in less than six weeks. As a small institution, JU has many “offices of one,” where a single person at the university responsible for a particular, but essential task. The newly integrated advising system eliminated these potential “single points of failure”—design flaws in a system where a problem in one area causes the whole system to fail—from the advising system and made transparent if, when, and how students would be able to get the help they needed.

While JU's implementation of Starfish was unique, the experience can be instructive to others considering similar transformations of their advising processes and technology systems. The lessons learned about the role of stakeholders in the implementation process drawn from this case will be added to and synthesized with the experiences from other institutions to develop

more generalizable insights to be shared in the final case study report to be published in fall 2021.

In the meantime, we will be publishing two additional mini-case studies over the next several months. If you think that the advising technology implementation at your institution could be instructive to others, please contact us at michael.fried@ithaka.org.