Advising Technology Procurement & Planning:

A Practical Playbook for Higher Education Leaders

Executive Summary

Technology has unquestionably changed the way that we live and work. For colleges and universities, the rapid rise of advising technology in particular has changed the way we understand and support students. Terms like "Student Risk-Scoring Algorithm" and "Next-Generation Nudging Platform" have flooded leadership inboxes, conference circuits, and increasingly, casual conversations about student success. New tools now allow faculty and staff to send up virtual flags when a student is at-risk; analytics engines shed light on which policies and practices impact student persistence; and mobile applications, AI-powered chatbots, and the rise of video conferencing all provide new avenues for efficient and flexible student communication.

Some institutions have realized the promise of these new technologies, with their technology-supported advising models reaching double-digit gains in student retention and completion. Across the last several years, those institutions—and their chosen vendors— were elevated to the national spotlight. Other colleges and universities were quick to follow suit, investing in advising technology products of their own. The result? The advising technology market ballooned—a 2019 landscape scan estimated that there are now thousands of products on the market, which is now valued at roughly $360 million dollars.[1]

But while advising technology procurement has accelerated, not all institutions have seen strong outcomes from their investment. Rather than celebrating steady student success gains, many colleges have experienced expanding costs and a great deal of staff and faculty frustration. In some cases, technology has even temporarily exacerbated inequities in the student experience.

So why do some technology-mediated advising efforts succeed while others tread water or fail? Research from The Ada Center and the Advising Success Network has revealed that products themselves are rarely the culprit of challenged initiatives. Instead, how institutions approach—or re-approach—advising technology initiatives is far more consequential.

Advising Technology Procurement and Planning: A Practical Playbook for Higher Education Leaders is a research-based guide that has been developed to help institutions strategically plan for and invest in advising technology. Based on qualitative research and interviews with 40+ institutions and systems, the Playbook outlines clear steps that colleges can take to set up an advising technology initiative for success.

[1] Tyton Partners & BABSON Survey Research Group. (2019). *Driving Toward a Degree 2019—The Evolution of Planning and Advising in Higher Education—Part 2: Supplier Landscape.* Retrieved from http://drivetodegree.org/dtd-wp/wp-content/uploads/2019/01/TYT079_D2D18_Pt2_FINAL.pdf

The Playbook leverages case studies, interactive tools, and how-to instruction to explore the following four phases of the advising technology planning and procurement process:

I Planning for an Advising Technology Purchase

II Turning Vision into a Clearly Scoped Project

III Evaluating Vendors and Products

IV Choosing the Right Technology

The Ada Center's mission is to help access-focused institutions use technology to strengthen success and equity goals. To explore additional support resources, please visit **theadacenter.org**.

I Planning for an Advising Technology Purchase

Institutions with the strongest technology-mediated advising ecosystems understand that their investment in advising technology is, at its core, an investment in student success infrastructure. As such, planning for an advising technology purchase requires strong leadership and cross-institution collaboration to define a vision for how the new technology will support the institution's goals. To achieve this, effective leaders and teams:

⊘ *Align technology strategy with institutional vision and goals* to reimagine what student-centered advising and support should look like at the institution with the new technology, as well as the updated workflows and processes that must accompany that investment.

⊘ *Navigate the advising technology landscape* by gaining a clear, shared understanding of the specific types of technology that the institution needs and what the market currently offers.

⊘ *Understand the promise and limits of technology*, including acknowledging that technology itself is not a "silver bullet" and understanding the human-centered processes that are needed for an investment to be truly transformative for an institution.

⊘ *Build and empower a cross-functional procurement team* that consists of end users, strategy and resourcing leads, and IT and institutional research/data management leads.

TOOLS INCLUDED IN THIS SECTION:

— Advising Technology Alignment Exercise Illustration and Template

— Step-By-Step Guide: Building Your Procurement Team

II Turning Vision into a Clearly Scoped Project

Once institutions have a collaborative, cross-functional procurement team in place, they begin the work of sculpting their big vision for technology-mediated advising into an actionable project plan. Among the strongest procurement teams, this process is both inclusive of multiple perspectives and efficient. By clearly articulating existing pain points and gaps, understanding why they exist, and pinpointing which are most important and urgent to solve, strategic procurement teams ensure the project is rationally scoped and mission aligned. To create a clearly scoped project, exemplary institutions:

- ☑ *Craft a focused problem statement* that connects the institution's goals and challenges to the overarching rationale for a technology investment.

- ☑ *Delineate project goals and product category* to allow the team to establish clear parameters for procurement.

- ☑ *Interview end users to develop "user stories,"* which are bite-sized, distinct descriptions of technology features and functionalities that can be used to vet vendors and ensure that selected products ultimately meet end user needs.

- ☑ *Identify gaps and opportunities in the current system* and avoid buying duplicative technologies by mapping which functions are missing versus which may require further user training or other interventions.

- ☑ *Create a prioritized features list* with the understanding that, while it may be tempting to launch all the bells and whistles of a technology immediately, iterative and agile approaches to technology implementation are far more effective and sustainable over time.

TOOLS INCLUDED IN THIS SECTION:

— Defining Project Goals Worksheet

— End User Interview Guide and Notes Sheet

— Feature and Requirement Prioritization Guide

III Evaluating Vendors and Products

Technology continues to adapt and evolve with each passing year. High-performing procurement teams are vigilant about seeking out best-fit products and probing to be sure that vendor promises are built on a track record of success. To achieve this, they:

- ☑ *Develop a targeted vendor engagement plan* to allow the team to explore viable options on the market.

- ☑ *Facilitate vendor product demonstrations* that include impactful Q&A sessions to illuminate important information about product capabilities, implementation processes, and the total cost of product ownership over time.

- ☑ *Build a mission-aligned RFP and evaluation guide* to compare and contrast different vendors and products while maintaining a focus on institutional priorities.

TOOLS INCLUDED IN THIS SECTION:

— Vendor Q&A Cheat Sheet

— Post-Demonstration Reflection Guide

— Evaluation Rubric Illustration and Template

IV Choosing the Right Technology

Beyond simply "checking the box" on final questions and references, effective procurement teams embrace that, while no one can predict exactly how an implementation will unfold, there is plenty that can be done early-on to position the institution—and its new technology—for long-term success. As these teams wrap up the procurement process, they:

✓ *Gather productive insights from peers* while keeping in mind that each institution's context is different, and therefore the relative applicability and value of advice from peers can vary greatly.

✓ *Audit the vendor's data strategy* by asking critical questions about data access and configuration plans.

✓ *Prepare for implementation* by considering how the implementation progress and the relative success of the new technology-mediated advising model will be assessed and addressed over time.

TOOLS INCLUDED IN THIS SECTION:

— Step-By-Step Guide: Peer Consultation and Feedback Analysis
— Vendor Data Strategy Audit Protocol

Questions about the publication can be directed to **Brittney@theadacenter.org**.

The findings and conclusions contained within are those of the authors and do not necessarily reflect positions or policies of the foundation.

As the world's events continue to impact the way education is delivered, it is increasingly critical that technology-supported advising initiatives deliver on their potential to advance student success and equity. Though it may appear daunting to work through these steps, many institutions already have the building blocks of these practices in place. The Ada Center and the Advising Success Network hope this resource can guide your procurement processes and support your teams in their ceaseless efforts to better serve our students.

The Ada Center

ADVISING SUCCESS NETWORK | BILL & MELINDA GATES *foundation*