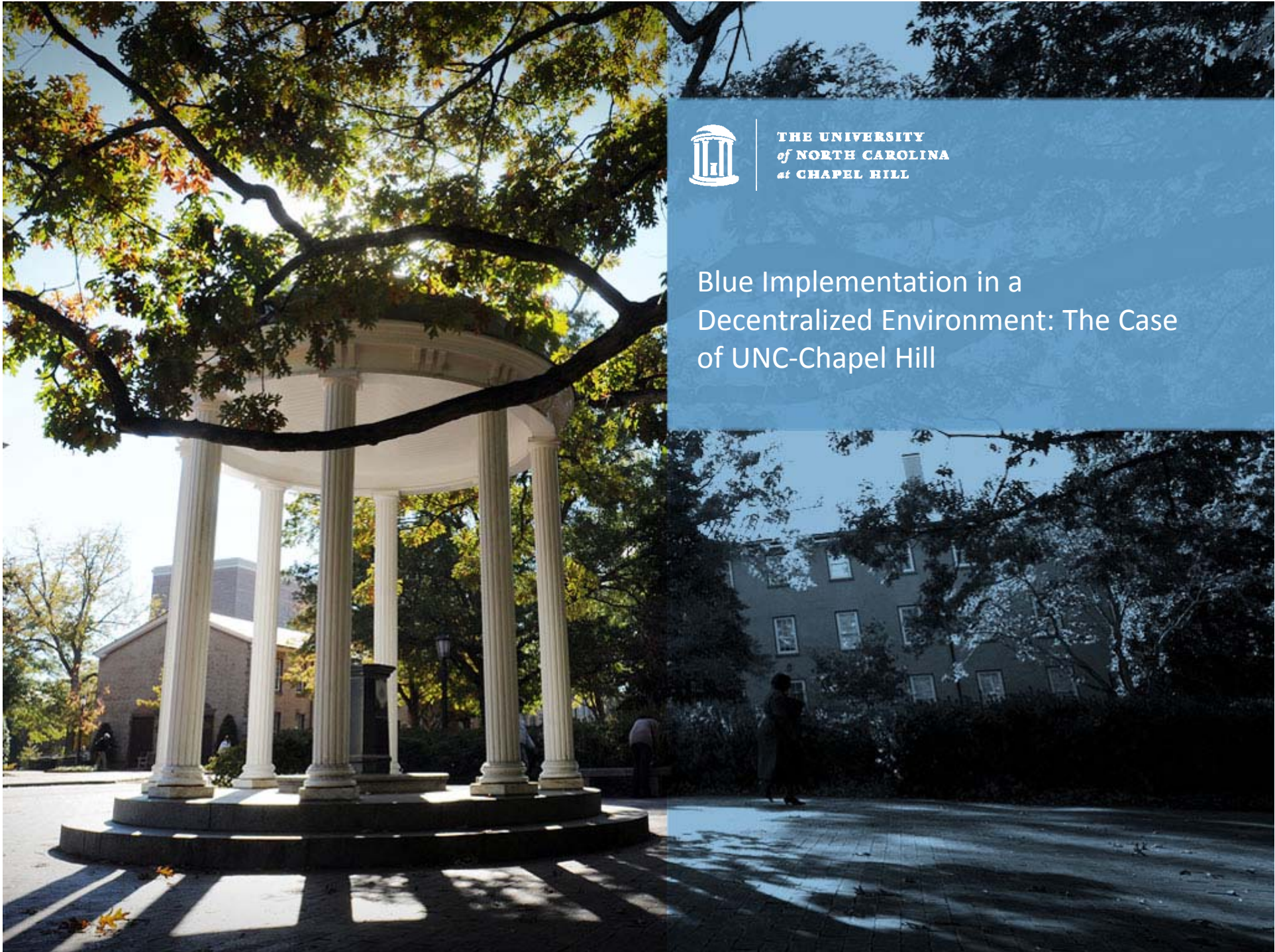THE UNIVERSITY
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Blue Implementation in a
Decentralized Environment: The Case
of UNC-Chapel Hill

Presenters:

- Dr. Jason Block, Program Compliance Coordinator, Office of Institutional Research and Assessment

- Heather Thompson, Course Evaluation Coordinator, College of Arts and Sciences

Agenda:

1. Introductions
2. Get to Know the Audience
3. How UNC-CH Came to Choose Blue
4. Implementation: Phase 1
5. Implementation: Phase 2
6. Questions

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Goals:

1. Help other schools implement Blue regardless of level of decentralization.

2. Provide an example of how to make Blue work in a decentralized environment.

3. Make sure schools with centralized models know how lucky they are! ☺

Audience Questions:

- How many of you are current Blue users? Prospective users?

- How many of you are from large institutions? Smaller institutions?

- Why did you choose to come to this session?

How UNC-CH Came to Choose Blue

- Blue is our third CE solution in the last five years.
- Our previous solution proved to be unreliable and too difficult to manage in our decentralized environment.
  - Fall 2015: catastrophic data failure which resulted in about 40% of our data being duplicated.
  - Continual system failures during peak season.

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How UNC-CH Came to Choose Blue

- Given the mandate to find a new, more reliable, solution.

- Process:

  – Team of 3 from Central Institutional Research previewed the top six solutions on the market. Analyzing them through the lens of the issues we had with our previous solution.

  – After the previews convened a meeting of users to get a sense of the features they wanted in a new solution.

Structure of CE at UNC-CH

Central IR: Support for Units Using CE Solution

College of Arts and Science 27 Instruments 1 Dedicated Admin	Department of Allied Health (SOM) 1 Instrument Under Student Services (3)	THC1 Education 1 Instrument Under Student Services (2)	School of Library & Info Sciences 1 Instrument Under Student Services (2)
School of Public Health 3 Instruments Under School IR Unit (2)	Department of Biochem (SOM) 1 Instrument Under Student Services (2)	School of Nursing 3 Instruments Under School IT (1)	School of Government 1 Instrument Under Student Services (1)
School of Education 1 Instruments Under Student Services (1)	School of Social Work 1 Instrument Under Student Services (2)	School of Media and Journalism 1 Instrument Under Student Services (2)	School of Pharmacy 3 Instruments Under School IR Unit (1)

THC1   I did a dry run with my department, and they gave feedback that we should emphasize CAS on this page so it stands out to folks to key on. Also, you had SILS twice but no Friday Center, so I fixed that, but we may want to double check it before Wednesday.

Thompson, Heather C, 7/20/2017

How UNC-CH Came to Choose Blue

- Challenges:
  - Institution extremely decentralized:
    - Each unit runs its own process using its own instrument, and produces its own reports.
    - Resistance to centralization.
  - Unit personnel differ in data/technological abilities:
    - Some units have individuals with strong data and technology backgrounds
    - Most units have individuals administering CEs who are student services professionals with a plethora of other responsibilities

  Had to find a solution that worked for everyone.

How UNC-CH Came to Choose Blue

- Basic Requirements of a New Solution
  - Easy to use/intuitive.
  - Able to import course and instructor data from SIS (PeopleSoft).
  - Hosted (we later changed our minds).
  - Robust reporting abilities, including longitudinal reporting.
  - Ability to easily set up for multiple instructor evaluations.
  - Ability to integrate with single sign on (SSO).
  - Uniform communications.
  - Able to integrate with LMS (Sakai).

How UNC-CH Came to Choose Blue

- After meeting with our stakeholders we invited 3 vendors to campus for all day presentations both in large group and one-on-one formats.

- Stakeholders completed an online evaluation.

- Following feedback, Central Institutional Research drafted a proposal for the Provost.

- Blue was chosen because it met most of our requirements.

Implementation: Phase 1

- Implementation began in August of 2016 (Fall 2016 Semester) with a pilot involving two schools and four departments within the College of Arts and Sciences.
  - Pilot was supported by a dedicated PS Consultant at eXplorance.

- Challenges
  - IT Security. UNC-CH's IT Security Department is very careful about the solutions it allows FERPA protected information to be uploaded to. Central IR had to commission an independent review of Blue to ensure that the software, and our set-up of that software was secure.
    - It was at this point that we decided to host the solution on campus.

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Implementation: Phase 1

- Challenges (continued)
  - Formatting student/course data and relationship files for Blue.
    - Prior to Blue the individual units created their own course/instructor and student files and uploaded them into our previous solution.
    - Switch to Blue centralized that function. Central IR had to work with two different divisions of IT to get the tables set-up and uploaded automatically.
  - Education:
    - Training unit admins to use Blue:
      - For pilot, units were chosen because their admins were more data/tech savvy.
        » We wanted to be able to fully test Blue's ability

Implementation: Phase 1

- Outcome of Pilot:
  - Extremely successful!
    - Very few student issues!!!!!!
      - No requests to reset surveys.
      - No system failures.
      - Only issues were because we were using our legacy system and Blue at the same time—some student confusion over where to find evaluations.

Implementation: Phase 2

- Full roll-out to all units using Blue.
  - Continued to be supported by a dedicated PS Consultant at eXplorance.
  - Consultant came to campus to train CE admins and meet with them individually. HIGHLY RECOMMEND despite cost.
  - Consultant built or helped build the first projects and report templates for the individual units based on their previous instruments and reports.
  - Unit admins were responsible for deploying surveys and responding to faculty/student issues.

Implementation: Phase 2
A Unit's Perspective

- The College of Arts and Sciences
  - 47 academic units
    - 38 Departments
    - 6 Curricula
    - 3 Programs
  - 27 unique instruments
    - Plus add on questions for 1 Program
    - Instruments range from 16-50 questions per course (average of 35)

Implementation: Phase 2
A Unit's Perspective

- ## My Implementation Process
  - Identifying evaluation and reporting needs
  - Planning selection, data cleaning, data additions using the Data Integrity Gateway (DIG)
  - Communication plan with stakeholders
  - Building project , implementing instrument
  - Trouble shooting
  - Report building

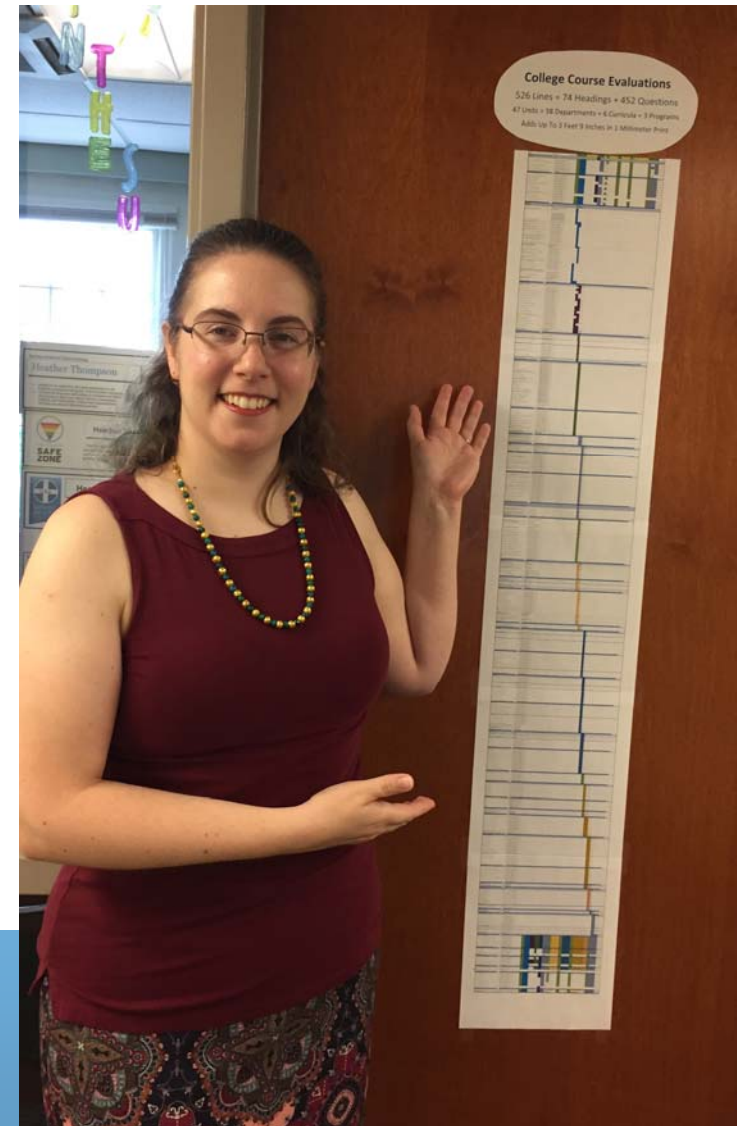# Implementation: Phase 2
A Unit's Perspective

- ## What went well

  – Student access seamless with few problems

  – Communication and buy-in

    - Regular emails, web presence (http://curricula.unc.edu/course-evaluations/)
    - Office Hours and on-call for help during DIG selection
    - Created step-by-step directions for end users

  – Instrument worked amazingly well

Implementation: Phase 2
A Unit's Perspective

- **The Biggest Challenges**
  - The instrument
    - 526 lines
    - 29 triggers
  - Reporting
    - 532 blocks
    - 3,321 course-instructor pairs
    - And breaking every software I work with

Implementation: Phase 2
A Unit's Perspective

- What I learned
  - Test everything!
  - Communication is key
  - Keep reporting needs in mind throughout the process
  - Every new system implementation has issues

Implementation: Phase 2
From eXplorance's Perspective

- eXplorance provided us with a dedicated PS Consultant who only worked on UNC issues during the full implementation.

- Major challenges faced by eXplorance:

  - Each school/unit within UNC-CH had different reports with varying data points and formats. eXplorance had to create these from scratch per school/unit.

  - Some schools had very specific setups based on how they taught courses.

    - Eshelman School of Pharmacy

  - Different schools required different data in the Blue data tables. We needed to ID those requirements early on to make sure data was in Blue.

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Implementation: Phase 2
From eXplorance's Perspective

- UNC-CH's Data
  - Maintenance of data at UNC-CH is also decentralized.
    - » The University Registrar is responsible for maintaining course data (both schedules and enrollment), but schools/units are responsible for assigning faculty to courses.
    - » Faculty data tables in PeopleSoft, which is where the faculty user data in Blue originates, is maintained by the individual schools/units.
    - » For some reason some faculty e-mails were not exported into Blue.

Implementation: Phase 2
From eXplorance's Perspective

- Data Problems Encountered
    - Not all faculty assigned to courses in Blue were actually teaching those courses. (Schools had to correct)
    - In schools like Pharmacy where instructors rotate and still need to be evaluated, some instructors were not in PeopleSoft because they had not been an "instructor of record" since 2009. (Schools had to correct using DIG)
    - The PeopleSoft Query Tool used to generate the tables for export into Blue did not have a high enough security access to pull many faculty e-mails. IT Security had to approve the tool having a higher level of access. (Central IR and IT resolved this issue).
    - Data issues created frustration for eXplorance and users.
    - Data is one of the major challenges in a decentralized environment.

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Implementation: Phase 2
From eXplorance's Perspective

- Empowering the Schools
  - Need to balance supporting the individual units without having to schedule 20 hours of meetings a week.
    - » Provide guidance but have unit administrators execute the work.
    - » ID the units who need more help due to complexity and/or less developed technological skills.
    - » Provide support in a quick and efficient way.

Conclusion:
Moral of the Story

- In a decentralize environment, get buy-in from constituents.

- Train and empower your people.

- Try and anticipate data needs and make sure data being put into Blue is accurate.

- Buy the Data Integrity Gateway, it's VERY useful.

Questions?