

# JAMES MADISON UNIVERSITY®

Harrisonburg, Virginia, USA

## Opting In & Changing Dates

Giving Faculty More Control Over Evaluations

FOR PUBLICATION TO BLUENOTESGROUP WEBSITE

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# JAMES MADISON UNIVERSITY®

## PRIMARY OBJECTIVES:

- A Little **Blue History** at JMU for context, including...
- How Administration Took Over Course Evaluations
- Using Blue to Help Faculty Regain Control of Their the Process
- Rebuilding Faculty Confidence in the Blue System



# JAMES MADISON UNIVERSITY®

## A LITTLE JMU HISTORY

- Founded in 1908 as the **State Normal & Industrial School for Women**
- Changed to **Madison College** in 1938, transitioned to Co-Ed in 1966
- Became **James Madison University** in 1977



These are the first three buildings on campus!  
Maury, Jackson, Ashby Halls, circa 1915

Photo Courtesy JMU Libraries Special Collections

# JMU Today



Aerial View of Quad and East Campus

**Single Campus—nearly 800 Acres**

**Total Enrollment in Fall, 2016**

**21,270 (FT and PT)**

**Student to Faculty Ratio**

**16 to 1 (smaller classes)**

**133 Degree Programs in 8 Colleges**

**5,235 Degrees conferred 2016-2017**

**2 Colleges & 17 Departments** using Blue for ALL

evaluations as of Summer, 2017, and adding one  
College in Fall, 2017



# JAMES MADISON UNIVERSITY®

JMU Div 1 FCS National Champs

Finished 14-1 for the season



## JMU's BLUE History

- Decentralized university—numerous evaluation methods! (Paper, Qualtrics, Google Surveys, Canvas, Scantron, etc.)
  - Multiple Likert Scale options (3 to 10 points, some dept evals weigh “heavier”)
  - Verbiage inconsistencies: +/- 50 ways to ask about overall course satisfaction (?)
- Considered Blue in 2011—SACS Accreditation for Online program
- Faculty support unit: use Blue to improve evaluations across campus
  - 300 most frequently asked became basis for JMU Question Bank (Fall 2017)
  - Sought more consistency in Likert ratings and question verbiage
  - Emphasis on environmental aspect
  - Encouraged departmental participation
  - This change for JMU would be cultural, political, systemic, BUT...
- Faculty were excluded from initial discussions re: changing JMU's EOT evaluations.
  - Input desired: establishing evaluation policies, date flexibility issue, response rate concerns, eval communications, choosing university questions, Provost's involvement



# JMU's BLUE History

- Started with Blue in April 2012, activated Fall 2012, for online courses only  
Intended target: our Small Online audience
- Remember the Faculty Support Unit and the push for campus wide consistency?
- Nov 2012, hired PT Course Evaluation Administrator, to begin eventual cross-campus implementation
- Spring 2013, support unit recruited 4 departments and one college to test Blue for online and in-seat courses
- *Provost's office set specific dates & times for each evaluation cycle*
- Date formulas placed into SA Queries to ensure desired results
  - Full term:** QP starts two weeks before evaluations  
Evaluations start up to two weeks prior to last class meeting  
**Never** during exams
  - Blocks and Summer Sessions:** QP = 1 week before Evaluations, and  
Evaluations = 1 week before end of term, ending day before EOT
  - Blue access controlled** through email links and SSO ONLY (No JMU credentials required in Blue)



## JMU's BLUE History, cont.

FACULTY ISSUES with the pre-arranged date set-up:

Felt forced to use Blue, "losing control" over evaluation process

No input into decision making, but most affected by outcome—they were almost left out of discussions

No control over delivery—"from where does the link come?"

"Some foreign entity notifies my students when to evaluate me!"  
(seemed like no local involvement)

Start and end dates not published for faculty—"when??"

"We always include the exam for the evaluation!"

No idea who or how many had completed evaluations

"Studies show response rates are higher with paper evals"

**STRONG** Push-back. Policies, processes unpublished.  
Gridlock was inevitable—and happened Spring 2014!





## JMU's BLUE History, cont.

So...what to do? How can we determine the best path forward?

Address faculty concerns to start:

- Use **QP invitation email** to advise faculty of evaluation dates
- Use **SVM task email** to allow faculty to monitor response rates, and remind them, "evaluations start [field mapped date]." Include tips to improve response rates.
- Make sure Faculty SVM reminders go day before Student reminders

### NOT ENOUGH

- Faculty pushed back on evaluation schedule: "Too many rules, no flexibility"
- One department wanted evaluations to end with exams versus last day of class. *Policy committee agreed, only as a test. Low rate of participation, dept. eventually opted out altogether!*
- Several departments requested date flexibility, down to specific dates / times (*Ex: last 20 minutes of last class meeting, exam day*)
- Other departments made their participation in Blue contingent upon date flexibility and access through Canvas



## JMU's BLUE History, cont.



**What harm is there in accommodating FACULTY REQUESTS?**  
After all, they are most affected by the Blue Evaluation Process.

But before I could act:

**HUGE ADMINISTRATIVE MEETING** ahead of Fall 2016 Semester during which Blue was discussed extensively:

- Issues with availability of raw data (it wasn't—yet)
- Use with Canvas—for some, no Canvas connection was “deal breaker”
- Current date schedule not desirable, but “we will make it work”
- Question Bank license was not in place, but “it is required”?
- Outcome: “Continue our ‘organic implementation’ of Blue, one to four departments per term” until consensus can be reached or issues resolved favorably

## JMU's BLUE History, cont.

Following that meeting, Blue team asked about allowing faculty to change evaluation dates, to the last week of classes (or last class meeting).

**APPROVED!** Provisionally—test first! SO...

PILOT project to change dates—One new-to-Blue department, Fall 2016

- Eval response rates tied to instructional accreditation.
- Asked them to test for entire campus (*success determined future use*)
- Two projects:
  - **Task** (opt in, change date) and **Target** (*processes*)
- Default was opting OUT (*no evaluations to students*)
- Faculty had to physically follow a link to say, "Yes, use Blue."
- After saying "I'll participate," Faculty could change dates to their preferred option (*last day of class, exam, normal schedule*)
- After changing dates, system loaded info into Target Project from which all other evaluation processes would occur
- Reports still delivered 48 hours after grade submission deadline



## JMU's BLUE History, cont.



### MORE CONCERNS!!

- Default was set to “opt out”—what if faculty forgot to follow link?
- Students would NOT receive evaluations (“Remember, we use evaluations for instructional accreditation certs.”)
- Faculty thought it was too difficult: “If I am being forced to use the system, why do I have to work to so hard for it?”
- “Let the ones who don’t want to use Blue work harder to stop the processes!”

### So...

- We set the Opt In project to an Opt OUT project, with Opting IN as the default. (Opposite of eXplorance webinar instructions)
  - Forced faculty to follow link to OPT OUT, “Not for me.”
  - If faculty forgot, or if they ignored notifications, students would still receive evaluation link, following regular schedule.
  - Still...difficult to follow. “There MUST be an easier way...”



**January, 2017, met with two AUHs, one new-to-Blue, one already-in-Blue.**

Discussed coming into Blue, reports design changes, departmental in particular

Current Blue AUH asked about the new date pilot—"successful or not?"

"Could our department try it, too?" (Date choice was required by the new department.)

## **BOTH DEPARTMENT'S SPECIFICATIONS**

All courses receive evaluations, no opt outs (no need for a two-project format)

All faculty requesting last week or class meeting—had to feel the same as taking question sheets and Scantron answer cards to class

Must be simple—faculty should be able to change date(s) in as few steps as possible

Link Availability only during the selected date/time

*Tested a single-project date change from our sandbox—SUCCESS!!*

Decision: try this in PROD, using three depts, including Fall16 "do-over"

Create a separate project, Spring 2017: track use, determine success.

If we are successful again, it will be available for all Blue users.

*Were we? You will find out later!*

***We called it the DATE & TIME SELECTION OPTION!***



The name and some details are subject to change but, REVIEW & DETAILS:

- Live-tested with **SINGLE PROJECT** for Spring 2017, separate from our “regular” projects  
Three departments: two fairly new to Blue, one seasoned under typical schedule
- **A FEW DAYS BEFORE QUESTION PERSONALIZATION (QP) BEGINS:**
  - SVM link to faculty via email or SSO
  - Faculty follow link to change evaluation date (for availability to students)
  - Faculty choose & enter preferred date & time—or allow Blue to assign default date
  - Available through duration of QP cycle but must be completed before evaluation(s) open(s) to students
  - Once process is completed (“applied”), link is only available during time selected
  - Default is JMU’s “regular evaluation schedule” (last two weeks of semester, last week of block)(-ish)  
If Faculty forget or ignore, students still receive link as scheduled  
QP process begins as scheduled  
Response rates can be monitored
- SVM reminders for Response Rate Monitoring if dates unchanged
- Student anonymity is protected
- Reports delivered end of term, according to standard practices (48 hours after grade submission deadline)



# SETTING IT UP:

To Allow Faculty To Change Evaluation Dates

STEP ONE:

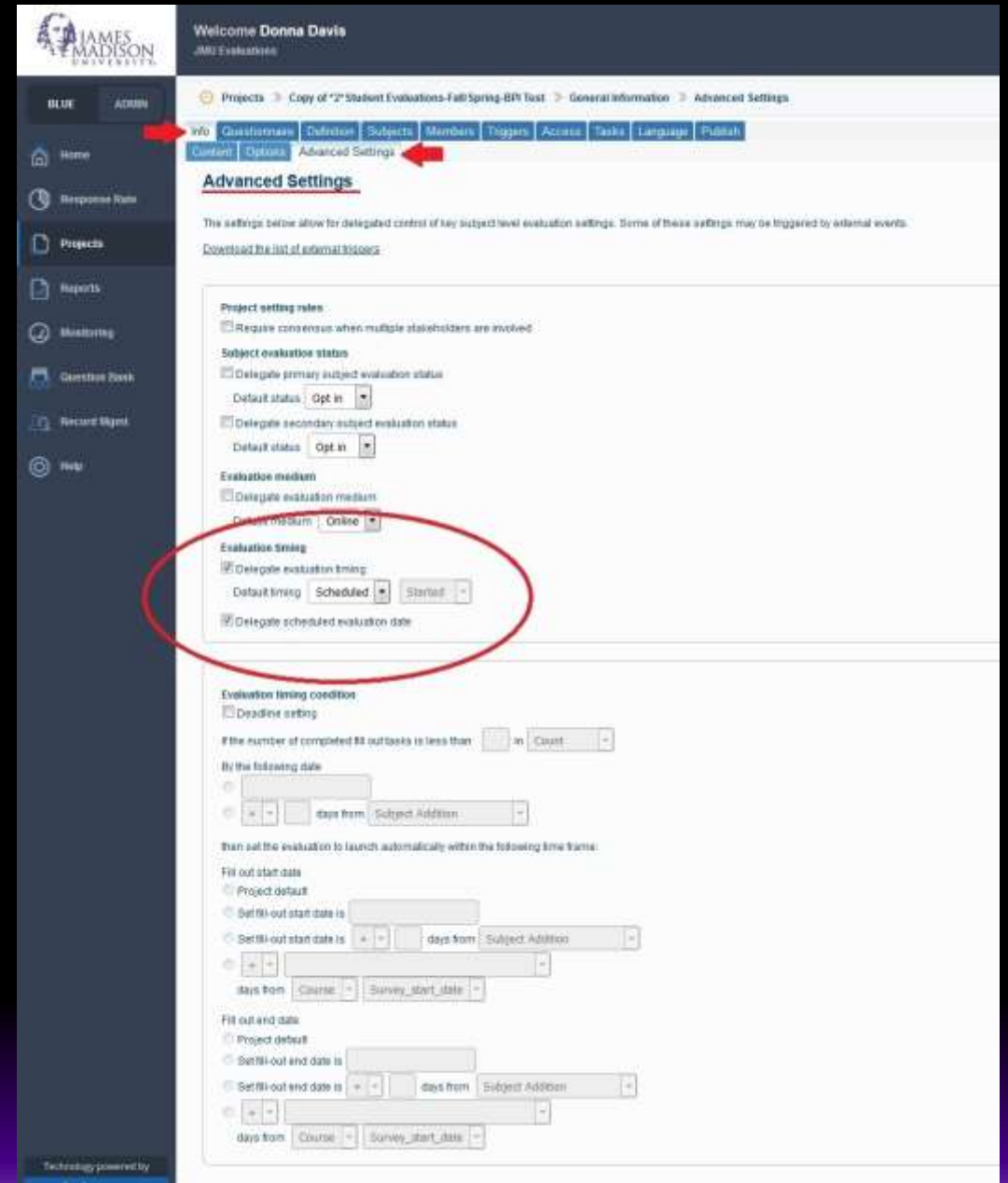
In Project, under INFO Tab, Advanced Settings

Mark Evaluation Timing boxes

Default = Scheduled (so that link is automatically available)

Delegate scheduled date (allows faculty to change date)

**\*SAVE\***



## STEP TWO:

After Questions selected and other tabs followed, in order, select **Subject View Management Task**.

Select start and end dates for this task.

Under **Task Options**, **Delegate scheduled evaluation date**, apply the date range during which evaluation links are active. (I use normal evaluation start date and the course end date, including exam.) **\*SAVE\***

This prevents faculty from scheduling outside any normal parameters.

Date task must be completed prior to evaluation link delivery to students.

Use SVM Task reminders for faculty to monitor response rates on default-dated evaluations.

\*If using field mapping in emails, may need to manually apply end dates (**Project Manage**), to appear correctly in FFO emails. This process doesn't change data source end date—yet.

The screenshot shows the 'Task Options' section of the JMS Evaluations interface. The 'Delegate scheduled evaluation date' section is highlighted with a red box. It contains the following options:

- Define date range validity:
  - Between: 02/01/2017 00:00 and 02/12/2017 23:59
  - Between: days from subject addition
  - Between: days from subject addition
  - Between: days from [ ]
  - Between: days from [ ]

Other sections visible include 'General Settings' (Require authentication, Include sign-out link, Include finalize button), 'Email Settings' (Send emails, Do not send any emails for this type of task, Do not send invitation emails for this type of task (send reminders only)), and 'Impact of Owner Removal' (No Effect, Stop Task, Delete Task). The 'Analytics' section includes 'Third Party Analytics' with a text area for pasting tracking code.



# EXECUTION

**STEP THREE:** Faculty follow link in email, SSO, or LMS to enter date and time preferences for evaluation availability to students.

*NOTE: The time is actual start and finish time, on a 24-hour clock. Use up or down arrows to change hours and minutes.*

The screenshot displays the James Madison University evaluation setup interface. At the top left is the James Madison University logo. Below it, the course name is indicated as "COURSE NAME HERE" with a "Finalize" button to the right. The "Medium" is set to "Online". Under "Timing", the "Scheduled" option is selected, with a "Switch to Manual" button. A note states: "Dates can be manually set between 02/01/2017 11:00 and 02/01/2017 14:00. System chosen dates may fall outside this range." Below this, the "Start Date" is set to "2017-02-01 12:00" and the "End Date" is set to "2017-02-01 13:00", each with a calendar icon. An "Apply Changes" button is located below the date fields. At the bottom, there is a "Response Rate" section with a table showing the following data:

	Responded	Invited	% Rate
Students	5	297	1.68%

A pink arrow points to the "Response Rate" table. The page is powered by "blue".

Click calendar icon beside date to make date / time selections.

Click "Apply Changes" for selected date to be effective.

Faculty click "FINALIZE" for task to show as completed in their dashboard.

"Scheduled" timing for automatic availability.

This is where faculty monitor response rates, unless your institution uses the Response Rate Monitoring Dashboard.

# Provide Instructors a How-To Guide, to simplify:

## NEW, UPDATED INSTRUCTIONS FOR FACULTY: DATE & TIME SELECTION

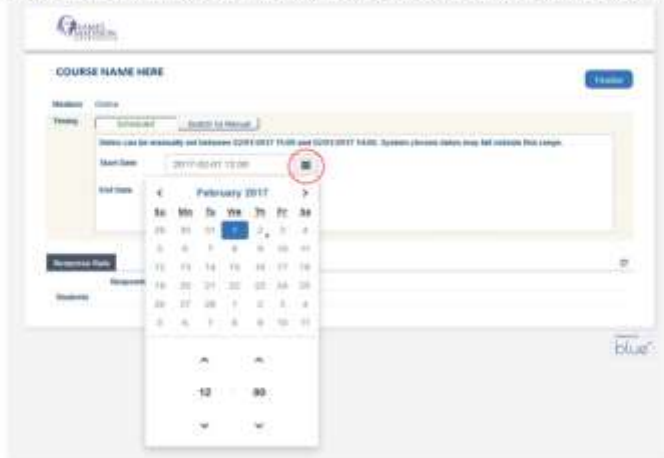
For use by departments requesting the ability to change their evaluation dates

These instructions are intended to be helpful, with screenshots. If you have any issues, please contact me using the information at the bottom.

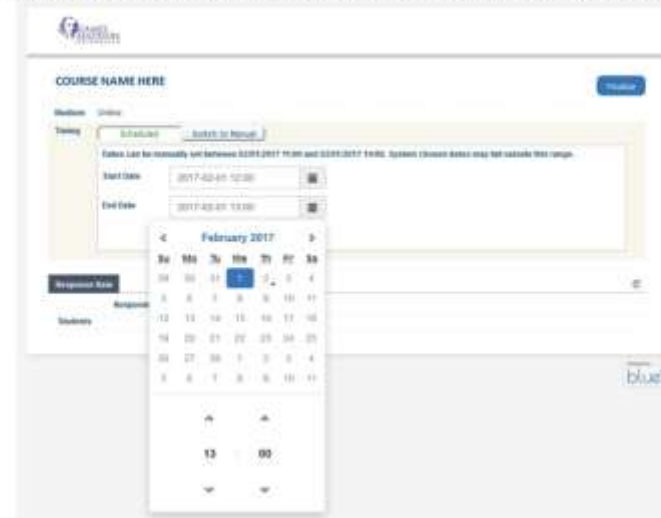
- 1) You should receive an email with a link, asking you to verify the dates for your evaluation.
- 2) The email activates a link in MyMadison. (Found by clicking your Faculty Tab, then looking to LH side of screen)
- 3) When you click the link, you will see a list of your available courses. Clicking on one will take you to the following:



- 4) Leave the Timing set for "Scheduled" so evaluations start automatically, regardless of the date and time chosen.
- 5) Click on the Calendar icon beside Start or End Date.
- 6) Select your start date and time. NOTE: This is a 24-hour clock. Use up or down arrows to set hours and minutes.



- 7) Select your end date and time. NOTE: This is a 24-hour clock. Use up or down arrows to set hours and minutes.



- 8) Once start and end dates and times are selected, click "Apply Changes" to make the new dates / times effective. Students will only be able to access the evaluations during the time(s) selected. Advise students of the new evaluation date and time, especially if it is limited to a single class meeting.
- 9) You do not need to click the "Finalize" button. This only causes the task to show as completed in your list.
- 10) This is the same screen you will use to monitor response rates. (See "Response Rate" tab in screen shot.)

### NOTES:

- a.) A pre-determined range of dates will be set for date selection for evaluations, to include exam week. **Most dates will fall inside that range.** If your dates do not, Blue will stop you, and ask you to pick another date / time. If you do not select a specific date and time, your evaluation will be available during the regular evaluation schedule: two weeks before exams on full terms and one week before course end on blocks and in summer sessions.
- b.) Links will only be available to students during the dates and times you selected, or by default if none are selected. If exceptions need to be made, please contact the administrator using the information below.
- c.) **Remember, if you forget to follow the link or the process, your evaluations will default to the schedule in the course.** Your students will receive the link, and all will receive reminders. You will still be able to add questions if you desire, and monitor response rates.

Thank you. I hope you find this process simple. If you have any questions, or if you need someone to walk you through it the first time, do not hesitate to call the Blue Evaluation Administrator at 540-568-7697.

Donna Davis  
Blue Application Administrator  
Email: davisdy@jmu.edu  
Phone: 540-568-7697

Screen images from Blue 5.3.000. ©2017 xploration  
Created by Donna Davis, Blue App Admin, Feb, 2017



## SUMMARY:

If faculty select a date and time, such as the last class meeting of the semester, the link is only available during the date and time selected.

Selecting “Scheduled” means the link is automatically available, with no further action by faculty, regardless of date and time selected.

“Manual” requires physically starting and stopping the link on chosen date/time.

Students may use any device to access. Faculty instruct students to bring their smartphones to class on the scheduled evaluation date. *If your institution uses mobile apps, make sure faculty (and you) know how to access Blue using the Mobile App—ahead of evaluation! Students will ask.*

JMU Students receive an email from the system on the date and time selected by their instructor(s). The link will also be activated in Student section of our SSO.

Link from JMU's SSO



## THE RESULT of Faculty Taking Control of Delivery?

- ✓ Evaluation link is only available to Students on the date and time faculty select.
- ✓ Using “scheduled” timing means instructors are not in class during evaluations, which helps protect student perception of anonymity.
- ✓ Idea is to “miss” the occasional rogue student who never attended class, but remained enrolled “just for the evaluation”!
- ✓ My phone rings less and my email in box is less crowded!
- ✓ Faculty have perception of higher response rates because of controlled availability.

I concur! *Results follow.*

*Note: It is only a perception of higher response rates. Results may vary by institution.*





# SUMMARY:

## 2016 - 2017 ACADEMIC YEAR By the NUMBERS

### RESPONSE RATES, Fall 2016:

Campus Project	27,269 invited	16,724 responded	61.327%
Online Project	1,397 invited	610 responded	43.665%
<b>Date Selection Projects (1)</b>	<b>659 invited</b>	<b>546 responded</b>	<b>82.853%</b>
OVERALL	29,325	17,880	60.972%

### RESPONSE RATES, Spring 2017:

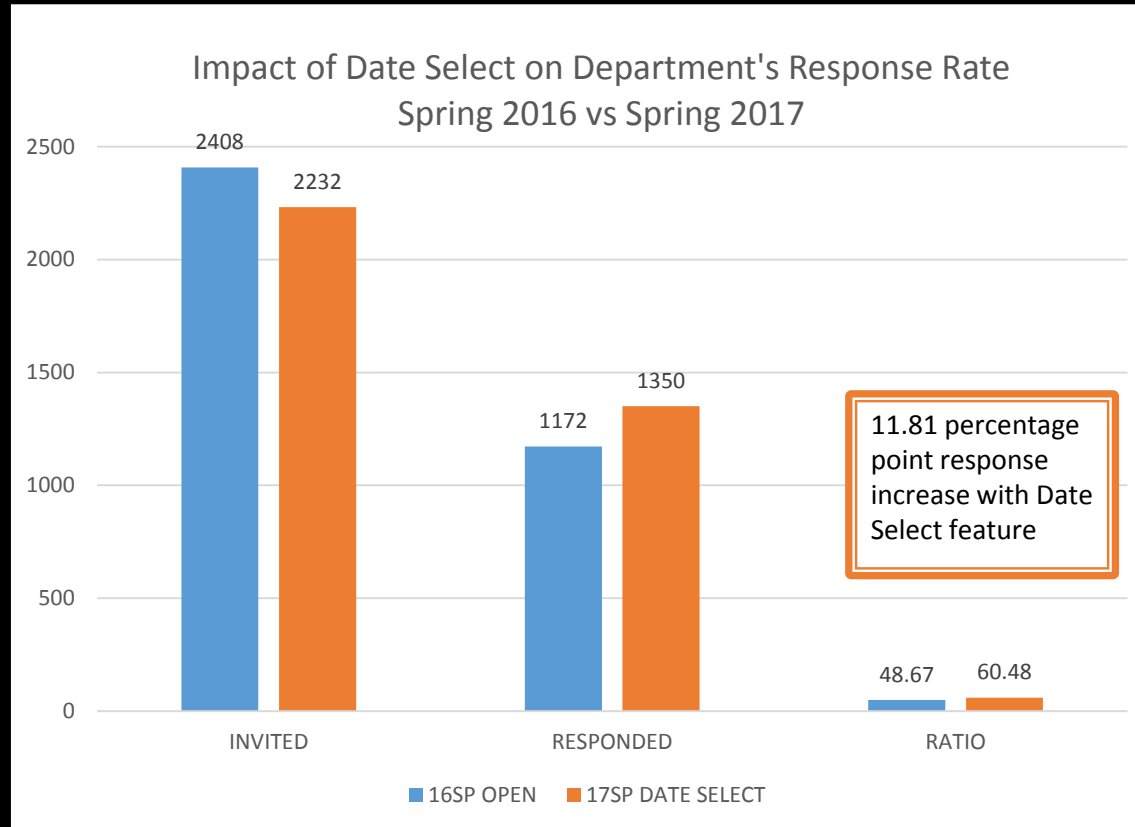
Campus Project	24,856 invited	13,263 responded	53.359%
Online Project	1,277 invited	713 responded	55.834%
<b>#Date Selection Project (3)</b>	<b>4,333 invited</b>	<b>2,512 responded</b>	<b>57.974%</b>
OVERALL	30,466	16,488	54.119%

**TOTAL FOR THE YEAR            59,791 invited            34,368 responded            57.480%**

*\*\*Notes: Spring 2017 was the first semester to ever see the online evaluations out-perform the campus evaluations.*

*#Spring 2017, two departments receiving instruction on date select process experienced higher response rates than one not receiving instruction.*

## ONE DEPARTMENT'S DATE SELECT EXPERIENCE:



*The AUH is almost certain the ability to select date & time was a major contributor in the increased response rate! "The only thing we did differently..."*

## IMPORTANT INFORMATION FOR FACULTY re DATE SELECTION:



- **COMMUNICATE!** Students need to know when and how the link will be available.  
*One instructor scheduled evaluations in the last 20 minutes of class—but forgot to tell his students. Three of 90 responded!!*
- Check class enrollment when changing dates, to verify students from non-Blue cross-listed course(s) are receiving the link. Prevents last-minute adds to Blue.  
*(JMU ISSUE ONLY! It will be resolved with eventual full-campus implementation.)*
- My most frequent call: **Clicking “Finalize” does not prevent student access** to evaluations!  
At all! Ever! It DOES stop reminder emails for faculty!  
*Second most frequent call: students questioning anonymity of process—though it is stated as such!*
- **“Scheduled” translates “automatic” link delivery.** If “manual” is selected, faculty will open the link manually, either from their office or from the classroom.  
*Remember: faculty presence in classes during any part of evaluation may jeopardize student perception of anonymity.*
- **Students may use any device to access.** Faculty instruct students to bring their smartphones or other device(s) to class on the scheduled evaluation date.

*ANY OTHER WAYS YOU GIVE FACULTY MORE CONTROL? As a matter of fact...*

# MORE WAYS JMU GIVES FACULTY CONTROL

## Effective Summer, 2017:



We have been a CANVAS institution (*and testing BPI*) since Spring, **2014**.

- ❖ We finally added Blue to Canvas in PROD—incrementally—thru summer, for a third access channel for Students (with email and JMU SSO).
- ❖ eXplorance and Instructure are Alliance Partners, which [hopefully] translates to better integration of Blue to Canvas LMS
- ❖ Monitoring response rates from Canvas-based evaluations

JMU set a specific threshold for adding course evaluations to Canvas, so that evaluations automatically appear in the course.

Number of Blue evaluations exceeds that threshold by at least 7 times. So...

Courses are added globally to Canvas, and Blue must be manually dropped into the Course.

The screenshot shows the Canvas LMS interface for a course. The top navigation bar includes 'COURSE NAME HERE' and 'Settings'. Below this, there are tabs for 'Course Details', 'Sections', 'Navigation', 'Apps', and 'Feature Options'. The 'Navigation' tab is active, displaying a list of course navigation items with settings icons. A red arrow points to the 'Blue Course Evaluations' item, which is marked as 'Page disabled, won't appear in navigation'.

Item	Settings
Home	⚙️ ▼
Announcements	⚙️ ▼
Modules	⚙️ ▼
Discussions	⚙️ ▼
Grades	⚙️ ▼
People	⚙️ ▼
Chat	⚙️ ▼
LockDown Browser	⚙️ ▼
WebEx	⚙️ ▼
Blue Course Evaluations	⚙️ ▼

Blue Course Evaluations  
*Page disabled, won't appear in navigation*



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## REVIEW of BLUE PROGRESS at JMU

- Blue system and related processes have dramatically improved since our initial use in 2012
- New JMU-added features show promise that response rates will continue to increase, with date / time selection and the Canvas connection, efforts appear to be effective
- More than 75% of JMU students have been exposed to Blue
- More than half of JMU academic units and instructional faculty are connected to Blue
- Scantron-based scoring and reporting processes are unsustainable: dated, fragile, and expensive to maintain
- More faculty are arriving to JMU from institutions already using online course evaluations, including Blue!
- ***Technology trends and reports show that nearly all students own and use a smart mobile device (phone, tablet, laptop) with internet access. Students use them throughout the day and have them readily available.***

# JAMES MADISON UNIVERSITY®

The most recent upgrade we received corrected our years-old issues preventing the distribution of raw data. So...from AC meeting in Fall 2016 to Summer 2017:

**"LET ME CHANGE EVALUATION DATE(S) TO MY PREFERENCE!"**

✓ **DONE!**

**"CONNECT BLUE TO CANVAS!"**

✓ **DONE!**

**"WE NEED OUR RAW DATA!"**

✓ **DONE!**

**"IS the QUESTION BANK FINALLY READY?"**

✓ **DONE!**



*First Game Fireworks, Bridgeforth Stadium, Sept. 2016*

Completion of these requested items positioned JMU to full-implementation readiness as of **JULY, 2017.**

*We are continuing as we have been, but when Administration says "DO IT" we are ready!*

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*Melbourne, VIC, AUS, as seen from ACU Health Sciences Building*

## QUESTIONS? COMMENTS?

Contact information:

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# JAMES MADISON UNIVERSITY®

**THANK YOU FOR YOUR TIME!**  
**Enjoy the rest of your day!**

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