



Planning for Rollout & Adoption:

A Guide for iPASS Institutions

Communication

Training

Evaluation

Refinement & Scaling

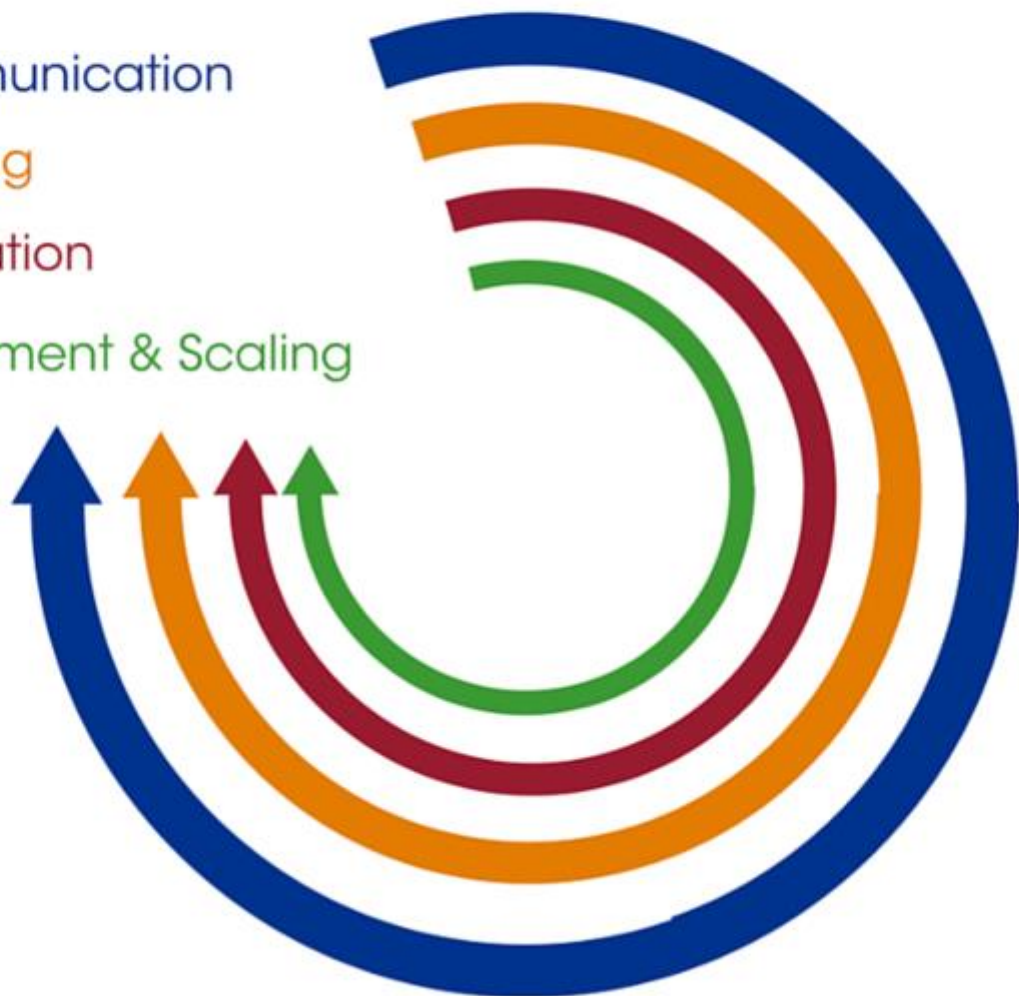




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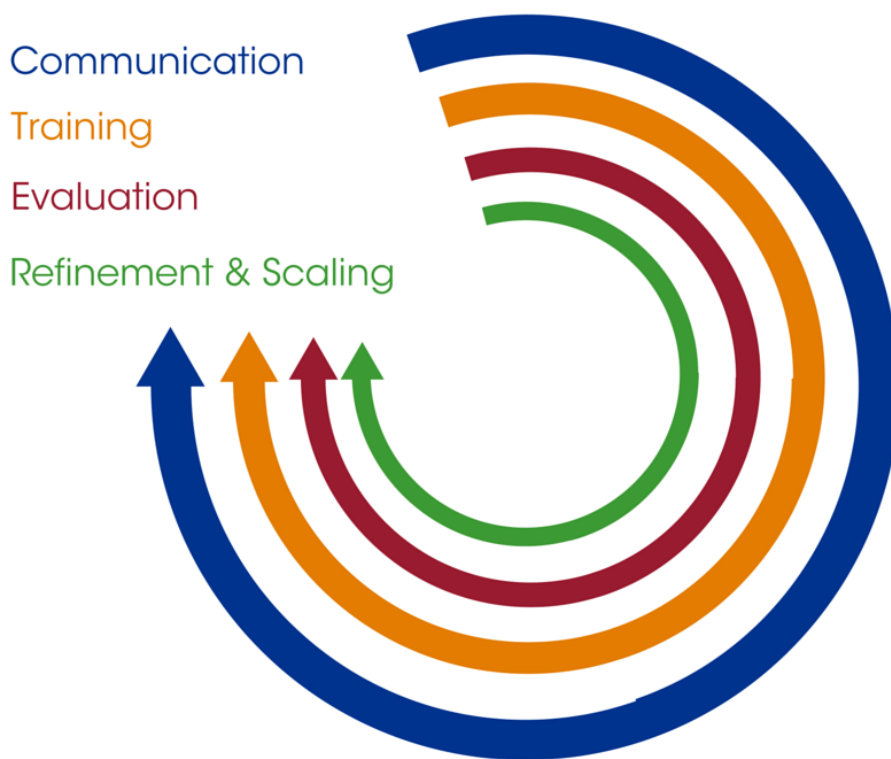


Resources



iPASS Rollout and Adoption Guide: Introduction

A well designed and executed rollout and adoption plan—that is, the formal launching of an institutional change effort—is a critical piece of any implementation. Often implementations of new technologies and associated business processes fail because the attention of the project team is devoted primarily to the planning and development phases, rather than to the equally important launch phase. A well-executed rollout plan will build the framework and capacity for true transformation to take place. Rollout and adoption plans should also be seen as repeatable processes because the refinement and scaling stage, when well done, will in many cases demonstrate the need for a new cycle of Communication → Training → Evaluation → Refinement & Scaling.



This series of interconnected guides describes each component of a rollout and adoption plan, providing best practices and tools to help you and your team be successful as you implement iPASS at your institution.

Following this introduction, you will find five sections, one corresponding to each of the above components and an additional one focused on building an effective rollout team. Each component includes a series of steps and tips to help you and your team implement this component successfully. The Communication, Training, and Evaluation components also incorporate templates that you may modify to fit your institutional needs.



Building a Strong Team

Team Structure

Developing and implementing an effective rollout and adoption strategy is a highly collaborative effort that requires upfront planning, attention to detail, and a strong understanding of the needs, challenges, and desires of everyone. Engaging representatives of all key stakeholders helps them develop a thoughtful plan filled with the detail necessary to undertake and complete a successful rollout. However, having a large core team has the potential to bog down and confuse strategy development. We encourage you to think creatively about how to engage a wide range of stakeholders in contributing to the design and implementation of your strategy without the need for a large core team.


One example structure to consider is assembling a small core rollout team (no more than 8 individuals) that represents the key areas working on or impacted by your iPASS reforms. Together, these individuals should have in-depth knowledge of the following areas:

- Current advising and planning processes and policies.
- Your iPASS reforms and their impact.
- Communications strategy development and implementation.
- Integration of the new technologies into your institutional information technology environment.
- The experiences of those stakeholders who will be most affected by your reforms.




Team Composition

Assembling a cross-functional and cross-hierarchical team is a necessary component of all successful institutional change efforts. The team should have a deep understanding of your institution's iPASS reforms and of the institutional motivations for engaging in those reforms. It should be representative of all key stakeholders and well-placed to understand and engage with a variety of audiences in a timely manner and through the most effective media. Consider the list below when thinking about the composition of your rollout strategy team and the roles of each stakeholder.





Individual	Role/Contribution
iPASS PI and Project Lead	The iPASS PI and Project Lead represent the individual(s) most likely to see the full picture of the iPASS work-not only vision and goals but also the detail that is often required for internal communications.
Communications Expert	At least one individual from your institution's communication team should be included. Ideally, this person has a deep knowledge of all the institution's student success work and is heavily involved in or leading the communication of that work.
IT Director or Staff	A representative from the IT department who is heavily involved in the iPASS work will help the team communicate the benefits of the new technology(s) and may also help the person responsible for staging training by giving him/her a sense of areas where people are likely to struggle or need extra time/help adapting.
Administrator Responsible for Advising	This individual is likely to be the most knowledgeable about the current advising and planning processes and policies and how your iPASS reforms will impact these. They are uniquely positioned to be able to see and communicate the benefits and challenges to the institution as a whole as well as to the advisors and students as individuals.
Advisor(s)	<p>It is essential to have at least one advisor who will be dealing with your reforms on a daily basis on the team – and two would be preferable. They will be able to help explain exactly how your iPASS reforms will affect advisors and students so that the rest of the team has a stronger grip on those core audiences.</p> <p> It is a good idea to include additional advisors in a test audience to get well-rounded feedback on your messaging and methods.</p>



Individual	Role/Contribution
Faculty – Full-Time	<p>Having a faculty member present is particularly important for institutions that are asking their faculty to alter their behaviors or processes.</p> <p> Consider whether your iPASS reforms will impact different faculty in different ways. For example, will certain departments be more affected than others? How will the reforms impact developmental education faculty? Or faculty on the workforce side? Or faculty teaching subjects with high enrollment but low success rates?</p>
Faculty – Part-Time	<p>iPASS will likely mean changes that impact both full-time and part-time faculty. One representative from each group would be ideal. If including adjuncts is difficult, you might offer one-time opportunities such as a series of focus group sessions to get their perspectives.</p> <p> Consider creative ways to get feedback from adjunct faculty. For example, you might include a varied group of adjuncts in a test audience.</p>
Other Initiative Leaders	<p>If you are part of Achieving the Dream, we strongly encourage you to include your Core Team Leader on your iPASS rollout team to help ensure consistency with your other student success efforts and demonstrate how all your work is part of one cohesive strategy for student success.</p> <p> If you are not an ATD college, consider what other major student success efforts are taking place on your campus and whether one or more leaders of those projects could contribute to your rollout plan and implementation.</p>



Individual	Role/Contribution
IR Staff	<p>Having an institutional researcher on your team will be particularly important as you evaluate the progress towards your iPASS goals. Having an IR representative in the room who understands your iPASS reforms will help the team think of new ways of analyzing and communicating the data to help support the rollout of iPASS.</p>
Students	<p>Getting student buy-in for the work is essential to successful adoption of the new technology and processes. Having a group of students that broadly represents your student population (part-time/full-time, race/ethnicity, gender, age, family status, income, campus, high school, programs of study, enrolled in developmental education/college-ready) will strengthen your overall rollout and help you determine whether targeted communications and training are necessary. Find ways to make student participation ongoing rather than a one-and-done experience.</p> <p> Consider which student groups are more likely to use the new technology or system most and those that are likely to need most support.</p> <p> Consider ways to include students who are less actively engaged in the institution in this advisory group. Reaching beyond members of the student government or clubs will enable you to identify new ways to communicate with the students who are usually harder to reach.</p>



Communication Strategy

Given the importance of strong communication to generate buy-in for successful institutional transformation through iPASS, what follows is a resource for your team to use as you think through the most effective ways to communicate your iPASS work to various audiences. This section of the Rollout and Adoption Guide is intended to focus your discussions and prompt you to consider all variables as your team develops its communication strategy. It also offers an example communications strategy template for your team to customize to its needs. This template should be viewed as a companion to your iPASS Action Plan. We encourage all iPASS institutions to consider how this plan complements and integrates with the institution's overall student success communication strategy.

Steps to Developing a Strong iPASS Communication Strategy

STEP ONE: Finalize your iPASS vision

A strong vision, as described by Kotter's 8 Steps for Successful Change, can be identified as a clear, specific, and inspiring understanding of what the institution aspires to become or achieve and can be used by all stakeholders to set priorities and guide actions. The vision is a concise and forward-looking statement that clearly articulates the desired future state you hope to achieve through iPASS.

As you design or refine the vision that you listed in your iPASS Action Plan, consider the following:

- Clearly align your vision with the institution's strategic direction.
- Connect your vision to the student experience.
- Demonstrate how your iPASS reforms complement and integrate with the other student success efforts taking place at your institution.
- Ensure all team members are able to comfortably explain your vision.
- Ensure your vision provides a clear guide to faculty, advisors and related staff, and students.
- Your vision should make it clear that supporting students is the collective responsibility of everyone involved in the iPASS reforms so there is not one single institutional owner and the changes are not being forced on stakeholders.



STEP TWO: Analyze stakeholders and barriers

Conduct an analysis of your iPASS project with a focus on stakeholders and barriers. Who are the key stakeholders that need to feel a sense of urgency for your iPASS reform to be successful? What barriers or other issues may be keeping stakeholders from having the urgency you need for your iPASS reform to be successful? How can you leverage key stakeholders to generate excitement and buy-in? What role can communication play in overcoming barriers?

STEP THREE: Agree on the purpose and goals of your communications strategy

Identify the overarching purpose of your communication efforts. Your communications strategy should be focused on driving attitudinal change as it relates to your iPASS work as well as integration with your institution's other student success efforts and goals. Communication of your efforts is not an end in and of itself but is a means to achieving transformative change.

Once you have identified your purpose, identify the specific and measurable goal(s) your communication efforts are working toward.



For both the purpose and goals, consider conducting a visioning exercise with your team. Ask each member to identify the accomplishments they hope the iPASS reforms have achieved within the first year of implementation, particularly as it relates to the attitudinal change component of your work.



Be sure to align your communications goals with your iPASS and institutional goals. Try to keep the number of goals lower than three: more than that risks dilution.

If you identify more than one goal, complete steps 4-10 with a separate template for each goal.

STEP FOUR: Identify your key audiences (internal and external to your institution)

Identify and profile specific audiences you are targeting with your communication efforts. This is essential as you choose the most effective ways to communicate with each audience. Profile information could include: audience's knowledge, attitudes, and behaviors as they relate to



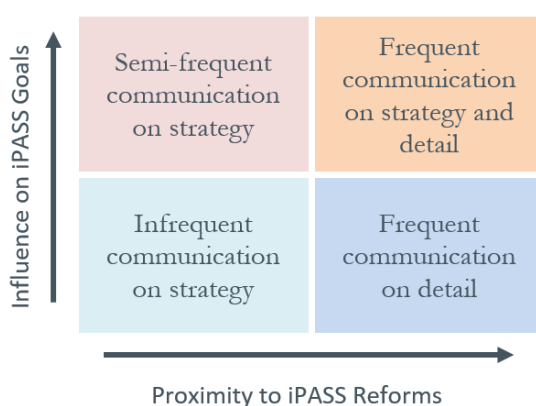
your iPASS reforms; obstacles to this audience fully supporting or participating in reaching your goals; and characteristics of this audience.



Identify individuals from each audience group on whom to test your method and message.



Consider mapping your audiences by their influence on achieving your goals and their proximity to the reforms (i.e. how much their day-to-day will be impacted by the changes). Putting your audiences into categories based on these criteria will help you to prioritize your efforts and to identify the right frequency and complexity of communication for each group.



STEP FIVE: Develop key messages

What do your audiences need to know about your iPASS reforms to generate buy-in? For each audience, identify what matters most to them in their role, the biggest obstacles they face in achieving their aims, and how your iPASS reforms can get them closer to their ideal. Whether they are concerned about access to more tailored and timely student information, a more fulfilling role in supporting students, or a reduced workload, your communication plan should be detailed and informed by evidence about their goals and challenges. Messages should be concise and engaging.



Make sure your communication strategy answers the questions: Why? Why now? Why will we succeed? Keep in mind that the “why” needs to appeal to both the head and the heart.



As you develop your messages, consider how to address different groups. What early wins could you pursue to build urgency and buy-in for your iPASS reforms with each audience? For example, could your president or another senior officer highlight the importance of the work in all upcoming communications?



STEP SIX: Identify the communication media

Identify the communication medium or media that will effectively reach your targeted audience(s), such as Twitter, Facebook, website, email, newsletter, meeting, speech, intranet video, or printed materials.



Begin by identifying the communication channels open to you and then map these to your audiences and messages.

STEP SEVEN: Identify evaluation metrics

Evaluation of your communication strategy is essential to ensuring your efforts and resources are being used effectively. Evaluation should be ongoing rather than a summative activity to enable you to make mid-course corrections and achieve maximum impact. Targets and milestones should be developed for each measure.



Develop SMART evaluation metrics (specific, measurable, actionable, relevant, timely).



Conduct a pre-communication strategy assessment for each metric to make sure you can most accurately track your success.

STEP EIGHT: Develop a work plan

A work plan is a detailed timeline of the activities you will undertake as part of your communication plan. It identifies these elements:

- Resources, including partnerships, staff, students, and money, you will need to complete your communication activity.
- Lead person for all things related to a specific communication activity/event/product, as well as other key people involved in completing the communication work.
- Activities that best help you convey your message to the intended audience in a memorable way. Remember what you learned in “Change Essentials” about the importance of creating messages that are “sticky.”
- Timeline for each activity.
- Budget implications of each activity.



This is an ideal time to think about other initiatives on campus or in your community that you can use as partners to help you achieve your goal. Partners can provide funds, expertise, support, or other resources that you may need.



For important messages, consider using multiple and unconventional media and activities. For example, have your students communicate the ways your project will benefit faculty and advisors through a short play!



Each communication activity should be focused on achieving your identified goals rather than communication for its own sake.

STEP NINE: Evaluate and adjust as necessary

Agree on times to evaluate the progress in implementing your communication strategy and determine strengths and weaknesses, identify obstacles, and create and implement new approaches so that your plan will be successful in supporting your identified goal.



Don't forget to consider how you can leverage your communication successes to generate even more excitement about the work!

iPASS Communications Strategy and Work Plan Templates



Visit the “Rollout and Adoption Guide” section of the iPASS Learning Community on [ATD Connect](#) to download the Excel version of these templates.

Communication Strategy Template

Your communication strategy should be no more than a page long and should clearly demonstrate the link between the various components. The purpose of this document is to guide the actions and decisions of your communication work and to help explain your activities to team members and others who are invested in the success of your iPASS reforms. Below is an example template you may use as you develop your iPASS Communication Strategy.

iPASS Vision: Insert the vision for your iPASS reforms.

Purpose: Insert the overarching purpose or objective your internal or external communication efforts are supporting.

Communication Goal	Related iPASS Goal(s)	Audience(s)	Communication Frequency	Communication Message	Communication Medium	Evaluation Metric(s)



Communication Work Plan Template

There are many tools for organizing the time, money, and staff you need to implement a communication plan. Below is an example that you may use to organize your iPASS Communication Work Plan.

Purpose: Insert the overarching purpose or objective your internal or external communication efforts are supporting.

Goal(s): Insert the specific goal that you wish to accomplish through your communication plan. As you have additional goals, create separate templates and think through the same issues.

Communication Activity / Event / Product	Status	Description, Including Key Messages	Audience(s)	Communication Medium	Lead Person and Other Key People	Date(s) for Completion	Resources	Evaluation Metric(s)	Related Communication Goal



Training Model

This section is intended to guide the creation of a plan for training those who will use the iPASS systems and services when they are launched at your institution. It also offers a training plan template for your team to customize to its needs. This document should be viewed as a companion to your iPASS Action Plan and iPASS Communication Strategy. We encourage all iPASS institutions to consider how their training plans can complement and integrate with the institution's overall student success strategies.

Your use of this document will depend on the overall shape of your project. For instance, if your institution already has part of its iPASS system in place about which all stakeholders are fully informed and what you are rolling out is one new component, you may be able to skip or condense some steps.

Steps to Developing a Strong iPASS Training Plan

STEP ONE: Review adult learning principles, as well as resources and materials available through your vendor or at your institution

Before you and your team begin to design your training, review basic adult learning principles, first identified in 1970 by Malcolm Knowles. Critically, Knowles' theory noted that adults:

- need to know why they need to learn something;
- need to learn through experience;
- approach learning as problem-solving; and
- learn best when the topic is of immediate value.

His original concepts of adult learning have been adapted in a wide range of training and educational contexts since, including both professional training development and instructional design at both the secondary and postsecondary levels.



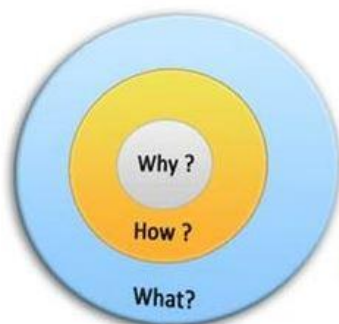
For information about this theory and the principles Knowles derived from it for the design of computer training, see this primer at:

<http://www.instructionaldesign.org/theories/andragogy.html>

Applying these principles to the training you will provide, you will recognize the need to begin with the vision of your initiative or project as a whole and to describe the “why” clearly at the outset. This is critical to making your training successful to support your iPASS overall goals.



Start with “why” and make your training be part of supporting your transformation. In his [TED talk “How Great Leaders Inspire Action,”](#) Simon Sinek incorporates his concept of the “golden circle,” where “Why?” is at the center of making any endeavor succeed.



Does your vendor(s) have a training program in place? If so, you may want to ask the vendor representative(s) to “train the trainer,” offering their program(s) to a few key individuals at your institution, who can then train others or lead the development of your training program.



Does your vendor(s) have training materials already developed? Often vendor(s) have well-developed training materials and/or user guides. Check with your vendor representative(s) to get access to these so that you can determine their suitability for use in training at your institution. Customizing these materials should include inserting the workflows for your institution, clearly describing the “why” or rationale for the iPASS program, and providing an overview of how the program will work for your institution as a whole.



Is there training expertise available at your institution? If a staff member in your human resources office develops and/or offers staff training, or if one or more instructional designers work at your institution in the teaching and learning center or elsewhere, you may want to consult with this person/group about your training design or consider partnering with them to develop the training that your audience or audiences need.

STEP TWO: Determine your audience(s)

The second step in creating a training plan is determining who needs to be trained. Think broadly about all those who will be affected or who will need to use the systems, services, and/or new business processes. Make this determination with other members of your iPASS team, the “guiding coalition,” rather than assigning the decision about audience(s) to a single



individual. Depending on the specific new program or programs you are rolling out, trainees might include some or all of the following groups:

- Advisors, including both professional advisors and departmental faculty who advise students majoring in their disciplines
- Senior administrators, such as provosts, deans, and department chairs
- Instructors/faculty
- Other staff who work directly with students, such as professionals in financial aid and career services offices
- Technology staff working in advising or other student services offices
- Students

One-size training does not fit all. Each of the audiences you identify will have a different perspective, different expectations, and different requirements for what they need to learn. Accordingly, you will need a customized training plan for each audience. It will also be important to ensure alignment among the plans for separate audiences so that each group is aware to an appropriate degree of the knowledge and expectations of other groups. For instance, when training advisors, the trainer(s) will need to explain how the advisor role is tied to what faculty will do. If there are processes and procedures that vary from one school or department to another that will require advisor follow-through, these should be covered in the training.

If you have identified more than one audience, complete steps 3-9 with a separate template for each.

STEP THREE: Determine the goals and objectives of the training

The key to successful training is knowing exactly what the trainees need to understand and be able to do once they have been trained. For each audience you identified in Step 2, you will need to develop goals and objectives.

Goal: Broad statements of the expected outcomes of training – the overall knowledge or skills trainees will have gained. To determine the goals ask yourself, “What do the trainees need to understand, and why is this important?” Basing the goals on the core question “Why?” will give them meaning and help your audience to “want to” learn and adopt the new skills and new knowledge.



Learning objectives: Specific statements of trainee-centered performance. There are likely to be several of these for each goal. Each objective should have an action verb that is measurable and observable. For your iPASS training, tie each objective specifically to your rollout. For instance, if your trainees are instructors who will be using an Early Alert system to indicate concerns to their students, this might be one of your objectives: “Instructors will be able to select students, select a flag type, choose appropriate course context, enter comments, and save.” A learning objective for advisor training might look like this: “Advisors will be able to enter notes online after they have met with students that give specific details of what was discussed or addressed during the meeting and will understand the role of these notes in creating an electronic student record that boosts transparency across the institution about each student’s progress.”

STEP FOUR: Work out the sequence of steps that need to be included in the training session as the basis of the agenda

Each of the objectives you developed in Step Three represents a major component of what the trainee needs to know and be able to do. There are likely to be supporting areas of skill, understanding, and/or competency needed in order to reach each objective. As you determine these supporting skills, it may be helpful to work backwards, from the objectives toward the current state of the trainees’ knowledge. For each objective, list the skills that a trainee will need to understand and be able to demonstrate at the end of the session. Listing these skills, and the other skills that underlie them, creates a logical sequence of topics that the trainer(s) will need to cover during the training session. This list of topics to be covered forms the outline of the session agenda.



Carefully consider your objectives, agenda, and audience to identify the individual(s) who will most effectively deliver this training to attain your overall goal.

STEP FIVE: Plan how you will shape the expectations of the trainee audience, create the right environment for the training, and introduce the session

Determine where and when the session or sessions will take place, who will lead them, how the invitations will be issued, and whether any pre-work or materials will be shared with the participants in advance.

As noted in Step One, in order for those who will be trained to want to learn this new system and/or approach, they need to know why they are undertaking this new learning and, as far as possible, how it will benefit them. This need gives the trainer(s) an opportunity to show how



the specific system(s) and/or skills that they are learning fit into the overall iPASS project - and the potential increase in student success at your institution that is the ultimate goal.

To make clear the “why” behind what participants are being asked to do and to ensure genuine engagement with the information and skills that they will learn, the trainer(s) should plan a session introduction that will set the specifics of the training within the context of the institution’s overall iPASS initiative and that will also set trainees’ expectations for how the session will proceed. The introduction should include these elements:

- high-level overview of the vision for the institution’s iPASS work
- high-level timeline
- how the institution intends to measure success with implementation of the iPASS tools
- targets or benchmarks that the institution is hoping to achieve: for instance, the percent of faculty who adopt the use of a tool, the increase in the number of referral appointments to support services that occur during the first year of implementation of the tool, etc.
- any results available from prior usage of the system, both to help build buy-in and to set the stage for the new benchmarks as the institution continues to press its student success efforts forward
- plans for getting feedback on the iPASS implementation as an aspect of evaluating success (for instance, planned satisfaction surveys for students, faculty, advisors, etc.), making participants aware that they will have a chance to respond and play a part in continuing improvement
- future training sessions that are scheduled or anticipated
- planned future phases of implementation, allowing trainees to understand that the iPASS transformation is ongoing rather than a single instance of change
- overview of the agenda for the training session itself that will show the trainees how the various segments and skills fit together
- explanation of the ground rules for the session (for instance, you may find it valuable to ask that cell phones be turned off for the duration)
- how questions will be handled during the session
- where questions or requests for help performing the tasks should be sent after the session



In setting times for training, make sure to leverage times and occasions when opportunities to learn new information and skills may be most effective:



- Faculty training can be highly successful if done during or in conjunction with a regularly scheduled convening of faculty, when they will be together and will be setting their agendas for the new year, semester, or term. At such a convening, consider engaging your institution's provost or president to set the stage with a few words on why iPASS in general and this training in particular is so important.
- Similarly, student training that occurs as early as possible in the year, semester, or term can catch students at a moment when they are especially receptive to learning campus procedures. In particular, including training as a part of the orientation for first-year students or for transfer students is highly recommended.



Make sure to account for how and when the training will be offered to those who may not be present at the regularly scheduled session: for instance, adjunct faculty.

STEP SIX: Develop a detailed plan for the session

For an audience that will be using a new iPASS software platform or a new component of the software, it is important not just to see the trainer(s) operate the software but also to have the skills to operate it themselves after the session concludes. To ensure this, hands-on training is preferable to explanation and demonstration alone. One useful way to plan what the trainer(s) will do is the “show and tell” method, times two:

1. **Show** the trainees what they are to do by demonstrating it.
2. **Tell** them what they just saw demonstrated.
3. Ask them to **show** how to do it: if possible, have them do it in their accounts or test environment.
4. Have them **tell** the trainer(s) and others in the group how it works.

Depending on the size of the group and on how many computers are available in the training room, it may be most efficient to have the trainees perform steps 3 and 4 in pairs or in smaller groups. The trainer(s) should minimize his or her own time in front of the computer as much as possible and should resist the temptation, after the initial demonstration, to be at the keyboard.

As the trainer(s) moves through the skills being covered in the session, they should use appropriate questions that begin with “why,” “how,” or “what,” rather than simply asking whether the trainees understand. Critical here is to help trainees understand not only how they will operate the system but also what will happen as a result. Understanding the full impact is as important as knowing how to use the system.



STEP SEVEN: Plan the review and the evaluation of trainees' understanding

Development of the training plan began with the establishment of at least one goal and several objectives. Once the training has been conducted, the trainer(s) needs to determine if the session has allowed the participants to achieve the objectives. To do so, the trainer(s) should remind participants of the agenda and objective and then engage them in a review. The review will have three essential components:

1. Trainees should demonstrate the techniques covered.
2. The trainer(s) should lead a question and answer session to see whether the trainees understand what they demonstrated and also whether they understand how it fits into their responsibilities as they begin using what has been learned.
3. The trainer(s) should respond to any lingering questions or concerns and should let the participants know how to get answers to questions that may arise later.

Consider these follow-up steps:

- The trainer(s) should do everything possible to communicate their concern for trainees' success and should ensure that trainees know where to turn once they start actually using what they have learned. It is advisable that the trainer(s) indicate their availability to meet in person or to answer questions by phone or email following the conclusion of the training session, since coaching is the best tool for ensuring adoption.
- In a handout to be distributed at the end of the session, the trainer(s) should provide clear, specific information about where to take questions and problems after the session as these arise. If a "Help" link is available directly in the system, include a screenshot showing its location in the handout.
- In order to improve the session for future offering, develop a short printed or online survey and ask participants to respond to it before they leave the training room. A second survey issued after participants should have started using the system may also provide valuable feedback for follow-up/refresher training if needed.

STEP EIGHT: Determine catch-up and review policies and strategies and formalize ongoing training and support

However carefully plans are developed and carried out for training, it is likely that someone who should be trained will miss the session. Determine a plan for how those who may be out of the office or otherwise unavailable, or those who are hired or appointed after the training takes place, will receive their training. Will the training be repeated at regular intervals? Will there be follow-up sessions? Will the trainer(s) make arrangements individually for one-on-one sessions?



Responsibilities for initiating and managing ongoing training should be clearly identified, assigned, and made available to the audiences that the training serves.

Training should be considered often as refresher training is critical to strong adoption of new systems and processes on campuses. Additionally, we encourage you to create and communicate a specific plan for ongoing training and support. Clearly identify the “go to” individuals that will support and answer questions about the new systems and processes. Be sure to have this documented and share during the training sessions. It will also be important to provide ongoing training resources that can be accessed anytime (such as videos or tutorials).



Consider offering follow-up training opportunities, allowing for individuals to take a “refresher course”, this is critical for strong adoption to take place.



Consider creating and publicizing a website internal to the institution where trainees can find information about the overall iPASS implementation, future instances of training, whom to contact with problems and questions, etc.



Particularly for skills that are used only annually, or only at a few points during the academic year, having a quick refresher that is easy to access will help adoption. Consider creating and making available online short how-to videos so that training participants can review “just in time.” Ideally, the speaker in a videos will be a member of the user group that the video addresses: students if the video is for students, an adviser if it is for advisers, etc. Seeing a peer carrying out the tasks successfully builds engagement and confidence.



Plan for and deliver “just-in-time” refresher training and/or communication of where resources are available to support early on adoption. For example: offer a “link” to a short training video on how to raise an alert/complete a survey in your communication to faculty when you are asking them to perform this task.

STEP NINE: Evaluate and adjust as necessary

It will be important for the trainer(s) to review and debrief the session with one or more members of the iPASS core team in order to ensure that goals have been met and, if necessary, to plan the next steps for each audience. If a post-session survey has been conducted, results from it can be very useful in making adjustments for next steps and future occurrences of the training.



iPASS Training Plan Template

Visit the “Rollout and Adoption Guide” section of the iPASS Learning Community on [ATD Connect](#) to download the Excel version of these templates.

Training audience	
Name of training	
Name of assigned trainer(s)	
Notes on pre-survey or pre-work if needed	
Handouts required, if any	
Goal	
Training objective 1	
Supporting skills for training objective 1	
Training objective 2	
Supporting skills for training objective 2	

Training Agenda

Time (in minutes)	Topic	Procedure	Outcomes

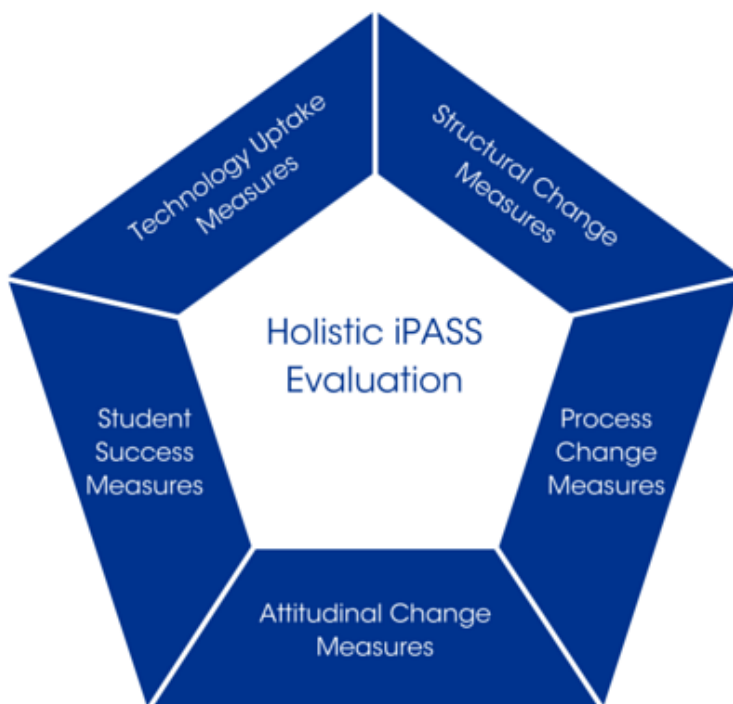


Evaluation

A strong internal evaluation plan for iPASS is critical to develop as you begin implementation to ensure you are progressing towards your iPASS vision and goals. The evaluation should be designed to capture the impact of your iPASS on students (their outcomes and experiences), the effectiveness of your implementation efforts, and the progress made toward institutional and cultural change that will enable you to achieve your iPASS goals. Employing quantitative and qualitative evaluation and disaggregating the data to analyze the impact on various student populations will provide you with the clearest and fullest picture of the progress of your iPASS reform. This information can then be used to refine your iPASS reforms and plan for scaling (see “Refinement and Scaling” section).

Steps for Identifying Essential iPASS Evaluation Measures

Developing an evaluation plan that begins tracking data in the five essential buckets identified in the graphic below provides ongoing feedback on how well things are progressing during the rollout phase and offers a basis for taking immediate actions to modify or enhance your iPASS reforms. This data can also be used to inform your communication plan, particularly identifying the short term wins you can celebrate to generate and maintain excitement for your iPASS work.





Technology Uptake Measures	Show the extent of technology adoption among key stakeholder groups.
Structural Change Measures	Show the extent to which systems and business practices are changing or have been changed.
Process Change Measures	Show the extent to which changes in individual engagement and interpersonal interactions with systems and business practices are changing or have been changed.
Attitudinal Change Measures	Show the extent to which core underlying attitudes, values, and beliefs are changing or have been changed. The underlying attitudes, values and beliefs are in regard to the systems, business practices and individual engagement and interpersonal interactions.
Student Success Measures	Show the student outcome results achieved.

iPASS partners use The Community College Research Center's (CCRC) definition of [transformative change](#) as occurring at the nexus of **structural**, **process**, and **attitudinal** change.

- **Structural change** is the design of systems and business practices and lays the framework for new processes and behaviors, thereby encouraging improved student experiences throughout the institution.
- **Process change** reforms how people do their jobs at an individual level as it impacts individual engagement and interpersonal interactions with systems and business practices.
- **Attitudinal change** is reform of the core underlying attitudes, values, and beliefs and occurs when individuals start to understand their work and view work processes in new ways.

To successfully adopt technology and transform the advising and planning experience for students, institutions engaged in iPASS should track all three types of change throughout the rollout. Institutions should reflect at points through the rollout on whether the institution is moving holistically toward achieving change at those three levels.

Given that technology adoption is an important component of the transformative change created through iPASS, it is also necessary to track **technology uptake/usage measures** that are important precursors to the successful structural, process, and attitudinal change.



Institutions will likely identify these with technology vendors, as they are contingent on the project focus and technology that each institution is deploying.

Finally, iPASS grantees are engaged in rigorous evaluation of some student success metrics through CCRC's external evaluation of the grant. However, there may be other key **student success metrics** that your institution will need to additionally collect to provide the most comprehensive evaluation of the ways in which your specific iPASS approach is impacting student outcomes.

Steps for Developing your iPASS Rollout Evaluation

The following steps provide an outline for developing your institution's formative evaluation and improvement process for the rollout of iPASS.

STEP ONE: Select leading indicators

Select several leading indicators for the technology uptake, structural, process, and attitudinal categories. Narrow the list for each category to those your implementation team considers to be the most critical and feasible to obtain during the rollout.

The most important leading indicators are those that will provide the best feedback during the rollout on how well iPASS is working and inform the need for action to improve performance, and therefore contribute to and guide your refinement efforts.

Feasibility is a function of the team's ability to reasonably obtain data on the leading indicator. It means that if some new data collection procedures are necessary, they are not unduly burdensome compared to their value to inform decisions on how well things are progressing and the need for improvement. It also means that the full list of leading indicators is not unduly burdensome to collect and analyze when considered in total.

LEADING INDICATORS

A good leading indicator is predictive of student success outcomes or results (such as course success, retention, and completion) and can inform actions to improve both lead and lag indicator outcomes.

STEP TWO: Complete the evaluation template

Complete the iPASS Evaluation Template. The Excel version of the template can be downloaded from the "Rollout and Adoption Guide" section of the iPASS Learning Community on [ATD Connect](#).



iPASS Evaluation Template							
Metric	Measure Category (Technology Uptake, Structural Change, Process Change, Attitudinal Change, Student Success)	Lead/Lag?	Target Value	Data Collection Sources & Procedures	Analysis Methods	Person(s) Responsible	Due Date(s)



Disaggregation of data is critical for student success metrics in order to answer questions such as “*How well did we do it?*” and “*Was anyone better off or left behind?*” Typical variables to disaggregate include race/ethnic group, gender, age, part-time/full-time status, and Pell status.



Your evaluation should include both quantitative and qualitative measurements. Surveys and focus groups are essential tools to help you identify **why** your iPASS efforts are or are not working and **how** you can refine them to increase successful implementation and adoption. Qualitative data is particularly valuable to inform your iPASS refinement efforts. Collecting qualitative data does not have to occur in one large effort. Periodic release of short two- or three- question surveys can also provide fruitful information on which to act. Remember to survey all of the stakeholders participating in or impacted by your iPASS reform efforts to get a holistic view.



Read more about evaluating student success efforts, particularly using a logic model, through the *Evaluating Student Success Interventions: Principles and Practices of Student Success* document. [Click here to download](#) the resource.

STEP THREE: Consider appropriate corrective actions

For those leading indicators selected in Step One, consider in advance the types of corrective action that could be taken to improve performance. By thinking through these options, how they would work, and the training required in advance of their use, it would be possible to test them if leading indicator feedback suggests this is necessary. This will help you expedite testing of improvement ideas during the rollout.

STEP FOUR: Continue to monitor measures and take corrective actions, as appropriate

Monitor performance during the rollout and take improvement actions as appropriate. In particular, your evaluation report will be an integral part of the refinement and scaling discussions. The evaluation measures and leading indicators you track can inform your reflection on the corrective actions that are needed to reach your iPASS goals.



Examples of Measurements

The following tables present measurements for your team to consider tracking. The list is certainly not exhaustive and you likely have ideas for other measures that will better suit your needs. The list is designed to give you a starting point and stimulate discussion about possible measures to track.

Technology Uptake Measures

- Number of warning flags raised for
 - financial aid and academic probations
 - absences
 - failed or missing homework
 - poor performance
- Number of positive flags (kudos) raised for
 - strong performance or improvements
 - students making up missing work
 - students receiving tutoring
- Percentage of students receiving
 - one to three warning flags
 - three or more warning flags
 - kudos
- Percentage of raised flags closed
- Percentage of full-time faculty and adjunct faculty using early alert system to
 - raise warning flags
 - give students kudos
- Percentage of faculty who record attendance
- Percentage of faculty who record mid-term grades
- Total flags raised for x number of students
- Total number of appointments being made by students and advisors
- Total number of notes being recorded by staff in the system
- Percentage of students using degree planning tools by purpose (degree planning, degree auditing, registration, etc.)
- Level of use of degree planning tool by advisors (staff and faculty) and student support staff
- Total number of degree plans built by students and/or advisors



Structural Change Measures

Leading indicators of structural change show the extent to which there has been change in systems and business practices.

- Extent to which advising and student support systems and practices have moved from a focus on enrollment and registration to a focus on sustained, strategic, integrated and proactive and personalized advising and student support
- Number and type of policies and procedures changed from optional to required (e.g. educational plan required of all students in first semester, mandatory advising, mandatory student success course, mandatory orientation, etc.)
- Extent to which student intake process collects information from students, including non-cognitive factors, which can be used to identify at-risk students
- The extent to which appropriate instruments are used to assess students' non-cognitive skills as part of risk assessment
- Extent to which resources and training have been developed to help faculty and staff transition to the new practices for iPASS
- Extent to which academic planning software supports academic pathways ([Guided Pathways](#))
- Protocols established for closing alerts and included in training for faculty and staff
- Number of student support and advising policies and practices redesigned
- Redesigned student intake process
- Redesigned student orientation, including an introduction of these tools and instruction on their use
- Creation of meta majors/educational and career pathways
- Percentage of degree programs that could be completed by a full-time student on time based on schedule
- Associate's Degrees: Percentage of degree programs comprised of 60 credits
- Bachelor's Degrees: Percentage of degree programs comprised of 120 credits
- Number and percent of stackable certificate programs created or redesigned
- Reorganization of institutional units and leadership
- Creation of new positions and or titles in support of this work
- Number of [High Impact Practices](#) (HIP) being offered throughout the curriculum to help increase student engagement



Process Change Measures

Leading indicators of process change show the extent to which there has been change in individual engagement and interpersonal interactions with systems and business practices.

- Extent to which advisors shift from functioning as registration clerks to approaching advising as teaching
- Extent to which advisors have access to and use student's risk assessment
- Extent to which advisors have access to and use periodic assessments of student's risk levels and advise student accordingly
- Number and percent of high risk, intermediate risk, and low risk students (as defined by the institution) that receive proactive advising and interventions
- Number and percent of students participating in group advising
- Number and percent of full-time faculty and adjunct faculty using early alert system
- Number and percent of course sections where early alert is used
- Number and percent of new cohort students using degree planning tool
- Student utilization rates of resources and services
- Average time of advising session for high-risk students, mid-risk students and low-risk students
- Number and percent of faculty who record attendance accessible by early alert system
- Number and percent of faculty who record grades throughout the term and accessible by early alert system
- Extent to which protocol for closing alerts is followed by faculty and staff
- Number and percent of students who follow through on early alerts (go to tutoring, see advisor, etc.)
- Number and percent of situations where students do not follow through on early alerts which are responded to through collaborative cross-functional follow-up by faculty and staff
- Level of cross-functional use of advising, tutoring, and instructor notes/reports regarding students (creation of notes and reports and review of notes and reports)
- Number and percent of students with academic plans by program/major
- Number and percent of deviations from academic plans not approved by advisor
- Number and percent of advisors who monitor their students' progress and reach out to the student if concerns arise (financial, academic, etc.)
- Number and percent of students who review academic audit information prior to registering or review degree planning tool to assess the impact of changing major or program on cost, time, and career



Attitudinal Change Measures

Leading indicators of attitudinal change show the extent to which there has been change in core underlying attitudes, values, and beliefs. The underlying attitudes, values and beliefs are in regard to the systems, business practices and individual engagement and interpersonal interactions with systems and business practices.

- Extent to which core underlying attitudes, values, and beliefs have moved from norms of efficiency and non-integrated support to norms of broad ownership of sustained, strategic, integrated, proactive, and personalized advising and student support
- Change in responses on survey items related to advising (Noel Levitz, SNSE, NSSE)
- Change in perceptions of iPASS usefulness
- Knowledge of support for iPASS
- Satisfaction surveys of iPASS users (students, faculty, staff)—be sure to include questions that uncover the ways in which users experience the institution and their work differently as a result of iPASS. Consider a short survey of 2 to 3 questions that could be periodically asked to track satisfaction, with different versions of the survey for faculty, for staff and for students
- Use of focus groups to track satisfaction and changing attitudes, values and beliefs
- Extent to which faculty and staff believe the resources and training for iPASS have been effective
- Extent to which appropriate instruments are used to assess essential college and career skills as part of risk assessment
- Extent to which faculty and staff understand and are committed to the college's vision for the student experience based on iPASS

Student Success Measures

Below we list student success metrics for you to consider that capture student outcomes across the trajectory of the student experience.

Connection / Entry

- Initial enrollment
- FAFSA completion
- Completion of New Student Orientation
- Survey of Entering Student Engagement (SENSE/BCSSE)
- Number and percent of students completing diagnostic
- Number and percent of students entering major or meta major
- Number and percent of students with academic/career plan
- Number and percent of students with financial plan



Progression	<ul style="list-style-type: none">– First term credits successfully passed and GPA– Attainment of credit milestones– Fall to spring persistence– Fall to Fall persistence– Course success rates– Course withdrawal rates– Credit completion ratio– Developmental education course completion– Gateway course completion– Changes in survey results from Community College Survey of Student Engagement (CCSSE); Student Satisfaction Inventory (SSI); National Survey of Student Engagement (NSSE)
Completion	<ul style="list-style-type: none">– Certificate and degree completion rates– Graduate satisfaction rates– Average length of time to credential– Average credits to credential– Cost of excess credits to credential
Transition/ Transfer	<ul style="list-style-type: none">– Transfer rate with award– Transfer rate without award– Ratio of credits earned to credits transferred
Transition to Workforce	<ul style="list-style-type: none">– Employment rates– Median first year earnings– Employer satisfaction rates



Refinement and Scaling

Engaging in transformative institutional change requires a phased approach in which the institution builds in a process for learning from the successes and challenges thus far, realigning the implementation with the original vision of transformation, and brainstorming the goals and next steps for scaling to the next phase. It is important to note that refinement is a continuous process. As your contextual reality changes—for example, through changing student needs or public/institutional policy reforms—and new promising practices are found, you should continue to refine your iPASS strategy.

Success in scaling innovation to improve student success is essential to the success of your iPASS work as well as other reform work in which your institution may be engaged; the concluding section of this document offers an approach to planning for scale. The process of refinement is an extra step to help you ensure the design of your iPASS implementation works at scale in practice, not just in theory. We strongly recommend that institutions begin to assess the need for refinement as early as during the first semester of the rollout. In addition to providing the opportunity to make real-time course corrections, beginning the refinement process this early will prepare you to begin scaling more quickly.

Whereas the other components of the Rollout and Adoption Guide (Communication, Training, and Evaluation) have clear steps and templates, the refinement stage requires a structured reflection discussion to identify the necessary next steps. What follows are guidelines for a strong refinement and scaling discussion.

Guidelines for a Strong Refinement and Scaling Discussion

Who

The refinement and scaling conversation should occur with your iPASS team, ideally a cross-functional and cross-hierarchical team that you have established early on (see tips and recommendations in the “Building a Strong Team” section). It is important to include this group to ensure that there is a clear understanding about how different stakeholder groups may be responding to your iPASS rollout.

When

If your iPASS rollout begins in fall 2016, we encourage you to hold the refinement and scaling conversation in October or November 2016. Although you will still be collecting assessment data about the rollout at this time, you will have collected a couple of months of data on the impact and adoption of the rollout. Analyzing this data may suggest minor refinements to be implemented immediately or more significant changes for spring 2017.



What

In addition to pulling together the team and using the discussion questions below, there are several planning documents you will want to refer to as you consider refinement and scaling, particularly your iPASS vision and goals. We encourage you to have an evaluation report of initial measures (see the iPASS Evaluation Template in the “Evaluation” section), along with the iPASS action plan, communication plan, and training plan.

How

The most effective discussions will occur when the group is open and honest. In a cross-functional, cross-hierarchical group, there are some steps you may need to take to ensure that a safe space is created for this dialogue. We strongly encourage you to include an outside facilitator: that is, someone who is not intimately involved with the iPASS work. This way, all members of the team can engage and the facilitator can focus on moving the conversation forward without being biased by their perspective about the project. This is critical because the effectiveness of the refinement dialogue is in the deep, honest, cross-hierarchical, and cross-functional discussion that occurs. We also recommend that you identify one person to serve as the “recorder” of the conversation.

We encourage you to consider discussing each of the sections below and then compile the notes. The notes about challenges, areas that require attention, or barriers to urgency should then be used to identify key next steps for your action plan in your next phase of the work.

STEP ONE: Review initial evaluation data and possible barriers

- What does the data show about use and adoption of the new technology? What does the data show about your progress toward transformative change (structural, process, and attitudinal change)?
- Are you where you thought you would be in implementation and adoption at this time?
- Brainstorm potential barriers that different stakeholder groups may be facing; hold conversations with representatives of those groups to determine the accuracy of your list. Then consider what might be at the root of the barriers? What needs to be done to overcome these barriers?



STEP TWO: Review your Action Plan vision statement and timeline

- Does this vision statement still resonate with your aspirations for the iPASS reform?
- From a holistic perspective, are you making progress toward this vision and toward transformative institutional change?
- What are key areas that require more attention to ensure they are implemented successfully?
- What milestones have been reached and what additional milestones need to be developed to scale the success thus far?
- What successes have you experienced thus far? Have you celebrated those short-term wins? What steps need to be taken to build on these successes?

STEP THREE: Check in on scaling success themes

Much of the work you have done prior to this point—including the topics covered in this Rollout Plan—has positioned your institution to scale iPASS effectively by addressing the cultural components of transformative reform directly. However, before you begin scaling, it is essential to pause briefly and ensure all bases have been covered to achieve scale effectively. We encourage you to work through the “Scaling Success Themes” questions at the end of this document to help prepare you to scale.

STEP FOUR: Check for technology updates and new features

Most institutions recognize that a phased approach in rolling out their technology solutions is a best practice. All too often, though, they stop after the first phase rather than continuing to leverage what they have invested in. Make sure you take the time to look at new features you are not yet using that may support your efforts, as well as enhancements delivered by your vendor partners.

- Schedule a follow-up call with your technology partners for an update on the solution.
- Share your findings with them: what works, what is not working, what you wish the technology did for you.
- Review updates/enhancements made to the system. You may be surprised to discover that some of the issues identified by your users have already been solved, and that adopting these new solutions can be an easy “win” to continue to boost adoption.
- If needed, engage with your vendor in your next phase of implementing new workflows. Remember to leverage their training materials and best practices.



STEP FIVE: Identify next steps and refine

Based on your discussions, revisit the following documents and identify the next steps and refinements needed to scale to the next phase of your iPASS roll-out:

- Action Plan
 - Do you need to make any revisions to the vision statement?
 - Enhance and build out the timeline.
 - What considerations do you need to take into account to ensure you are integrating iPASS with other student success initiatives?
- Communication Plan and Training Plan
 - Build on what worked from the first phase of the roll-out. What adjustments need to be made to the communication plan to address barriers and maintain urgency? How are you planning to improve and sustain your training efforts?
- Evaluation Plan
 - Are the measures you are collecting capturing the data you need to track the rollout and adoption of your iPASS reform? Do you need to make any adjustments based on the refinement and scaling discussion?
 - What data should be shared with stakeholders to maintain urgency and momentum needed to scale your iPASS reform?

Appendix A: Scaling Success Themes for Step Three

The process of scaling an effective strategy is a common challenge for higher education organizations due to the required willingness and commitment to change organizational culture and structures (administrative, power, and budgetary structures) as well as the need for broad-based buy-in. Careful attention must be paid to this institutional context and to the components of transformative change identified by the [Community College Research Center](#): structural, process, and attitudinal change.

Each institution will approach their scaling efforts in different ways due to this heavy focus on institutional structure and culture; however, there are common themes across successful scaling efforts¹. Below we organize these themes into four areas and provide questions to consider as you prepare to scale iPASS.

¹ Adapted from Catalyst Fund Evaluation: Case-Informed Lessons for Scaling Innovation at Community and Technical Colleges by DVP Praxis and Equal Measure: <http://www.achievingthedream.org/resource/14804/catalyst-fund-evaluation-case-informed-lessons-for-scaling-innovation-at-community-and-technical-colleges> and More to Most: Scaling Up Effective Community College Practices by MDC, Inc.: <http://www.achievingthedream.org/resource/1905/more-to-most-scaling-up-effective-community-college-practices> and Cutting Edge Series #2: Scaling Community College Interventions by Achieving the Dream and Public Agenda: <http://www.achievingthedream.org/resource/227/cutting-edge-series-2-scaling-community-college-interventions>



Visionary Leadership

Success Themes

- iPASS leadership has a strong understanding of the cultural context in which iPASS will be scaled.
- Leadership of all key divisions and departments are aligned in their iPASS vision.
- This vision has been clearly and regularly communicated with all college stakeholders along with data indicating the short-term wins that show progress towards achieving this vision.
- iPASS efforts are clearly and publically linked to the institution's overarching student success strategy and goals as well as the institution's accreditation and planning processes.

Questions to Consider

- i. Is the vision for iPASS aligned at all levels of the institution? Does your iPASS team have the support and resources to implement your scaling plan?
- ii. What aspects of your vision are resonating with key stakeholders? What does this mean for your communication efforts as you scale?
- iii. What obstacles do you anticipate facing in your scaling efforts? Consider categorizing your challenges by the type of change each represents:
 - Structural change (the design of systems and business practices)
 - Process change (individual engagement and interpersonal interactions with systems and business practices)
 - Attitudinal change (core underlying attitudes, values, and beliefs)
- iv. What institutional strengths should you leverage to overcome these obstacles?

Engagement & Communication

Success Themes

- Those who will be carrying out the changes on a daily basis are heavily involved in the design and approval of necessary policy and practice changes that impact their daily work.
- iPASS leadership present the pilot and scaling plan to stakeholder groups to elicit multiple perspectives, identify potential obstacles, and refine the plan before implementation.

Questions to Consider

- i. As support for your iPASS reform has grown, have you leveraged all supporters of this work to build momentum and buy-in?
- ii. Based on your experience with Kotter's Change Essentials and the strategies you learned to



build and maintain urgency, what would you say is the current level of urgency: true urgency, false urgency, or complacency? What barriers may be preventing the campus community from feeling truly urgent to adopt the iPASS reforms?

- iii. If you believe a significant proportion of the population is feeling truly urgent about this change, what are some specific strategies or steps the team will need to take to sustain and leverage the urgency?
- iv. How are you using your short-term wins and other evidence of success to continue to build excitement around the work reaching more students?
- v. What does your data tell you about the effectiveness of your communication plan? What course corrections are needed?

Support Structures/Resource Allocation

Success Themes

- Stakeholders involved on the ground in scaling iPASS are supported in making the necessary changes through the allocation of adequate decision-making power, training and support, staffing, and financial resources to facilitate scale.
- Leadership has committed the necessary resources to develop the expertise necessary to support quality implementation of an expanded strategy.

Questions to Consider

- i. Has there been adequate consideration of additional demands on key stakeholders implementing this work on the ground? Is there a likely source of required resources?
- ii. Do your training and support mechanisms have the capacity to support scale?
- iii. How has your data been used to inform your training and supports?
- iv. How do you measure institutional learning to ensure the effectiveness of training and supports?
- v. Are there any student success efforts that have not demonstrated significant success that could be discontinued? Can these resources be reallocated to your iPASS efforts?

Data/Evidence of Progress

Success Themes

- Stakeholders have access to and the training to interpret data related to iPASS to inform their work and monitor the progress of their scaling efforts.
- iPASS data is contextualized within the goals of the institution and needs of its community.



Questions to Consider

- i. Is your data disaggregated by race/ethnicity, income (or proxy such as Pell grant status), gender, enrollment status, etc.?
- ii. In your work with the rpkGROUP's ROI template, what have you learned so far about the return on investment of your project?
- iii. What economies of scale do you expect from scaling your iPASS efforts to all students? What is the cost per student?
- iv. Have you humanized the numbers when sharing them with the broader community? Have you considered turning the percentages into numbers and the numbers into students/people?
- v. How will you assess the effectiveness of your scaling effort? What metrics define success?
- vi. Are you tying your evaluation and communication plans together so that early outcomes are being communicated and any issues addressed transparently?