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Toolkit of Resources: Using Technology to Support Postsecondary Student Learning **Institutional Implementation Planning Guide**

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The purpose of the Institutional Implementation Planning Guide is to help administrators plan for the implementation of the recommendations in the What Works Clearinghouse Practice Guide *Using Technology to Support Postsecondary Student Learning* at their institutions. The Institutional Implementation Planning Guide aligns with the Institutional Readiness Assessment Feedback Report (Feedback Report). The Feedback Report provides practical, actionable advice specific to your responses to questions in the Institutional Readiness Assessment (Readiness Assessment). This Institutional Implementation Planning Guide provides additional context and advice related to change management and institutional strategy for your implementation of the What Works Clearinghouse's Practice Guide recommendations. While an institutional implementation of the recommendations is recommended, there are times when it is not feasible and department implementation is a better choice. In those cases, a department can use the Department Implementation Planning Guide, which accompanies these materials.

The Institutional Implementation Planning Guide is accompanied by three templates to assist you in planning and managing the implementation: the Project Charter Plan Template, the Communications Plan Template, and the Project Action Plan Template. Each template is accompanied by two examples: one example for the implementation of a single practice guide recommendation and one example for the implementation of all practice guide recommendations.

This Institutional Implementation Planning Guide has three sections:

I. Where to start.

II. Preparing for implementation of the practice guide recommendations.

III. Managing and sustaining institutional change associated with implementing practice guide recommendations.

The guidance that follows is based on relevant literature and recent research on leaders' roles in change management, as well as the authors' lived experiences as higher education administration leaders. This Institutional Implementation Planning Guide was codeveloped with current e-learning administrators from the Regional Educational Laboratory Northwest. Its authors have direct experience leading e-learning initiatives in postsecondary education. The documents referenced in this guide can be found in the zip file available for download on the Toolkit's Institutional Guidance webpage.

I. WHERE TO START

Rapid technological and social changes continue to impact the ways institutions support learners with technology and the ways instructors use it. Given rapid advances in this type of technology, this kind of "scaling" can happen haphazardly, with little or no intentionality or planning. As a result, many of the practices, policies, and structures needed to sustain quality technology-supported learning may be missing. Now, institutions seek more intentional scaling, which may require rethinking current practices to ensure that new practices last. Ensuring this solid foundation is where we start.

The key to institutional readiness for using technology at scale is the coordination of planning, training, and support (Fox et al., 2021). The key roles of administrators are to craft institutional plans for using technology at scale and to advocate for their implementation, to ensure that training is available, and to provide robust support for all users (Fox et al., 2021). This guide provides a road map for a comprehensive, institution-wide approach to scaling technology in teaching and learning. However, if department-level implementation is more feasible, see the Department Implementation Planning Guide, which accompanies these materials. Institutions and departments may engage with these guides at different stages of implementation, according to their individual contexts.

This Institutional Implementation Planning Guide is written for institutional administrators who are involved in the kinds of technology-centered changes suggested in the practice guide, such as deans, directors of teaching and learning, directors of e-learning, and others who are charged with leadership for classroom practice, educational technology, or both. We assume that you, as a leader, have personal experience or key staff with experience leading technology implementations and have institutional protocols to follow. We also assume that you are not starting this implementation from scratch.

Often, technology-supported learning is implemented by individual instructors or within single departments. However, creating the conditions needed for successful institutional implementation at scale is beyond the responsibility of any one department. The scope of the implementation—involving tools, technical support, training, and other resources needed to scale the use of technology-supported learning across institutions—is not the sole responsibility of individual instructors. It requires the buy-in and support of leadership campus wide and the engagement of many institutional units (Coburn, 2003). Therefore, it is essential that administrators work with a cross-institutional team that facilitates involvement from multiple stakeholders. The change this document guides you through is the shift from individual implementation of the practice guide recommendations to institutional implementation; this planning guide focuses on the development of institutional structures, practices, and processes that support instructors' implementation of the practice guide recommendations, with the purpose of supporting student learning.

Reading the practice guide—or at a minimum, the Administrator Practice Guide Summary—is an important first step in the planning process. The Administrator Practice Guide Summary outlines how each recommendation supports learning and what administrators need to know from the practice guide to carry out the recommendation. Next, turn to your Feedback Report, which includes guidance for action steps based on your responses to the Readiness Assessment. You will likely need to prioritize the actions to take. Review the specific guidance and map out the priorities and timing. To help determine priorities, consider these questions: Which actions align to other related institutional initiatives? Which actions require additional funding? Which actions require policy changes? What is

the technology procurement lead time at your institution? What is the institutional research data cycle, and what are the available resources to assess the data required for measuring the outcomes of this change? Three templates accompany this Institutional Implementation Planning Guide to help you map out these institutional actions and priorities.

Each section of this guide contains information and activities that teams can use to progress through the core phases of organizational change, including preparing the approach, managing outcomes, and sustaining outcomes (Prosci, n.d.-c.). Your institution may have already engaged in some of the steps of the process, at least in part and perhaps in an ad hoc manner. If so, use this Institutional Implementation Planning Guide to identify steps you might have missed or might not have completed thoroughly.

II. Preparing for Implementation of the Practice Guide Recommendations

Build a coalition of support

To prepare for implementing the practice guide recommendations, first build a coalition of support. This group comprises individuals from across the institution who agree that implementing the recommendations will benefit students and the institution. It must include institutional leaders guiding the implementation, early adopters, and other interested individuals. Engage with institutional leaders about the practice guide recommendations and the evidence provided to support the recommendations. As the American Society for Quality (n.d.) outlines, ensuring institutional executive sponsorship and securing commitment for a change initiative (for example, implementing practice guide recommendations) can help leverage resources and address competing priorities.

Assemble a steering group of institutional leaders who will actively guide the implementation decisions and actions. As Coburn (2003) points out, ownership of a reform should be held by institutions and educators because they have the capacity to sustain, spread, and deepen the principles of reform.

In the context of institutional implementation of technology to support student learning, this means creating a truly cross-functional team that involves leaders from groups who either implement the practice guide recommendations or might be affected by their implementation. This steering group might include:

- institutional leaders with authority to set broad policy direction and direct financial and human resources to education technology initiatives;
- instructional staff, including adjuncts and paraprofessionals;
- students, including student leaders;
- student support services, including academic advisors, staff focused on ensuring accessibility, staff serving specific student populations (e.g., students who are parents or caregivers), and staff from access and opportunity offices;
- information technology and education technology staff; and
- institutional research or planning staff.

Ask coalition members and steering group members to commit early to high levels of engagement and participation in the implementation to increase buy-in and to reduce resistance to the change initiative.

Develop a project charter

Engage with the steering group of institutional leaders guiding the implementation to develop a project charter. A project charter is a collectively developed document that includes a well-articulated problem or issue to be solved, a clearly specified goal, timelines for the implementation, and roles and responsibilities for group members. In addition, the charter should define and articulate metrics to be used to assess the outcomes of this change (Prosci, n.d.-b). Lead the steering group through a review

of, and discussion about, your Feedback Report to create a project charter that accurately describes the scope of your project. Time invested to create an accurate project charter will help manage outcomes of changes in the future. The Project Charter Plan Template, with a general example and an example for a single recommendation, is provided with these materials.

Develop an action plan

In collaboration with the steering group, develop a plan to guide the steps you will take for the institution-wide implementation of the practice guide recommendations according to your Feedback Report. The “Planning for institution-wide implementation” section of the Readiness Assessment includes more than 20 items. Review the guidance provided for these items in your Feedback Report for the assessment, and determine which items need action and what the priorities and timelines for those actions are. For example, if your Feedback Report confirms that your institution has analyzed student access to the necessary devices, applications, and Wi-Fi, your action plan should include steps to take based on those results, such as providing students with expanded access to these technologies.

As you develop the action plan, expand internal support for implementing the practice guide recommendations by identifying additional stakeholders, such as early adopter instructors and influential department leaders. With guidance from stakeholders, determine whether there may be resistance to the implementation of the practice guide recommendations. If so, how can you identify the resistance and resolve it? Identify how to enlist a large group of supporters to build sufficient momentum for the change to happen. To be inclusive, involve people who are well-positioned to support implementation but also those who are not traditionally involved and who are important to the conversation: students, staff focused on ensuring accessibility, adjunct instructors, and paraprofessionals. The Project Action Plan Template, with a general example and an example for a single recommendation, is provided with these materials.

Build awareness of the implementation

In your communications plan for the institution-wide implementation of practice guide recommendations, include a clear case for the planned changes, including positive outcomes that the changes will bring—particularly those that align with your institution’s strategic goals. Determine how to communicate this message, who will convey the message about the implementation and to whom, and the methods for delivering the message (e.g., employee forum, email, video). For example, the authors recommend that a vice president of instruction or a senior academic officer communicate important messages about implementing the practice guide recommendations. Be attentive to the importance of the roles of the institution’s leaders in communicating change. Work with the steering group to develop your communications plan, as their perspectives will help in developing a plan that matches the messages being communicated. The Communications Plan Template, with a general example and an example for a single recommendation, is provided with these materials.

Align technology and support

The selection of learning technologies associated with the practice guide recommendations should align with the institutional budget, accessibility policies, and technology policies and practices. Ensure that you thoroughly evaluate the accessibility, protection of student privacy, and data security of potential technologies and that you do not assume that vendors’ claims of product accessibility are

correct for your institutional setting. Consider technology support (e.g., help desk, device deployment) for staff and students when selecting, implementing, and managing technologies. Technology staff expertise may be needed to support these technologies and their integration into your institution's infrastructure architecture. The technologies associated with the practice guide recommendations can be used in face-to-face, blended, and online learning environments, so ensure that the level of support at your institution matches the anticipated demand.

Build instructor support

Engage with instructor groups (including full-time, part-time, credit, and noncredit instructors) as early as possible. Harness the expertise of early adopters through professional learning leadership opportunities.

Leverage instructors, as well as institutional leaders, to communicate information about the practice guide to instructor groups. Include rationales for adopting the recommendations and for alignment to your institutional policies and standards. Your rationale for the change may include the benefits of using technology to support student learning. See the level of evidence for each recommendation in the practice guide to identify the potential benefits for the institution, for instructors, and for students. For example, Lovett and colleagues (2008) report that a flipped classroom format in a statistics class had a positive and statistically significant impact on student assessment scores.

Emphasize to instructors and students the benefits of using the practice guide. Be thoughtful about how you communicate learning opportunities to instructors, as terms such as "training" and "professional development" may alienate some instructors. The term "professional learning" is used in the practice guide and may be less alienating.

Provide professional learning

The "Training for instructors" section of the Readiness Assessment includes 19 items. Review the guidance provided for these items in your Feedback Report and determine the actions your institution will take during your professional learning rollout. For example, if your Feedback Report shows a total score between 0 and 36 in the "Training for instructors" section, identify areas for which available training is not as comprehensive as is needed and include those areas in your action plan. This toolkit's professional learning course is a four-module professional learning series designed to help instructors learn about and implement the practice guide recommendations. Review this set of resources and determine how to offer the professional learning opportunity to your instructors. Additionally, determine if a technology developer has training resources or modules that can be shared with instructors. Provide ample time for instructors to learn about the recommendations and to integrate the recommendations into their practices. Instructors need time for curriculum development and integration of technology into their teaching practices.

The training sessions should include examples of how instructors can incorporate and model the use of these technologies and practices in their courses. Training staff can develop lesson templates based on best practices. Such supports can reduce resistance to adoption and can ensure consistent and higher-quality implementation.

Provide student technology training

Starting or returning to college can be a daunting experience for students. Develop a plan to ensure that students have access to the technologies associated with the practice guide recommendations in time for the start of their term.

The “Training for students and staff” section of the Readiness Assessment includes six items. To determine the areas that need to be added to your student training program, review the guidance provided for these items in the Feedback Report based on your responses. If your student technology training does not orient students to the uses and benefits of available collaboration technologies, revise the student technology training curriculum or training plan to ensure that students are oriented to the benefits of the collaboration technologies used on your campus, the reasons why these technologies are being employed, and the ways they can support learning, along with any norms and expectations about student use of campus technologies. In preparation for the student training program, determine and plan how students will be trained, who will train them, and when they will be trained. Refer to the Administrator Practice Guide Summary and the practice guide for detailed information and examples in the development of the student technology training sessions.

How will students be trained?

Provide training in a variety of modalities, such as face-to-face, blended, and online sessions (synchronous and/or asynchronous), to provide options for busy students. As you plan for the student training program, leverage all available campus resources—including human resources (e.g., instructional designers, instructors), campus space (e.g., multimedia training rooms, classrooms), and devices (e.g., computer labs, library device checkouts)—to ensure a high-quality program. Determine if the technology developer has training resources or modules that can be shared with students. To determine the right modalities for student training, engage the steering group to assess student needs, student training options, and resources.

Who will train students?

Technology training sessions can be provided to students campus wide—through a campus resource center or technology help desk—or at the department level. Determine which training options are available on your campus and which options students have historically preferred to use. Consider an approach such as the Digital Navigator program at Portland Community College, in which an employee helps students with digital inclusion by providing support with home connectivity, devices, and digital skills training (A. Grey, personal communication, February 2, 2023). Plan and deploy the proper campus resources for your training, including human resources, space, and technology.

When will students be trained?

Plan multiple training options for students (e.g., just-in-time training near the start of each term, when students need to learn skills quickly, or on-demand training that includes recorded sessions that students can view throughout the term). This allows busy students to select the option that works best for them. Additionally, returning students often need retraining as campus technologies are updated.

Provide staff technology training

All staff, including administrators, student support staff, and instructional support staff, should be trained in the importance and use of all technologies associated with the practice guide recommendations. As previously noted, the "Training for students and staff" section of the Readiness Assessment includes six items. Review the guidance provided for these items in the Feedback Report and determine the areas you need to add to your staff technology training based on your responses.

These professional learning sessions for staff should include evidence that the practices and technologies being implemented are associated with positive student outcomes and are an effective way to support learning, as well as information about and strategies for advocacy of the practice guide technologies. Refer to the Administrator Practice Guide Summary for the level of evidence for each recommendation. Use the practice guide for detailed information and examples in the development of the staff professional learning sessions. Staff training should also include opportunities for administrators to collaborate with instructors to adopt and integrate newer technologies and to develop infrastructure for sustainability. For example, an administrator may be a member of the decision-making group for strategic investment in these technologies and can help sustain these practices over time. Administrators also play a key role in bolstering instructors' use of these technologies and their use of the data from these technologies to inform instruction. Consider the following questions.

How will staff be trained?

Provide training in a variety of modalities, such as face-to-face, blended, and online sessions. Group training sessions or one-on-one training sessions may be offered, based on the volume of staff who need training. Synchronous training sessions provide the benefits of interaction; recorded, on-demand training sessions provide convenience for busy employees. Select, design, and deploy the best combination of training modalities for your institution. Determine if the technology developer has training resources or modules that can be shared with staff.

Who will train staff?

Determine who will provide staff with the professional development associated with the practice guide recommendations, including whether in-house trainers or external experts will be used. Options for in-house trainers can include your institution's professional development team or instructors with technology expertise.

When will staff be trained?

The professional learning course sessions can be customized to your institution's training frequency and can be aligned to your institution's preferred technology tools. Plan multiple training options for staff (e.g., just-in-time training near the start of each term, when staff need to learn skills quickly, or on-demand training that includes recorded sessions that staff can view throughout the term). This allows staff to select the option that works best for them.

Provide resource support

Resource support includes dedicated, sustainable resources for digital learning—including funding, staff, and infrastructure—which are essential to sustain the outcomes of these changes. As Pina et al. (2018) remind us, "No organization has unlimited resources. The key to effective leadership is deciding where to apply the resources you have" (p. 7). Administrators play an important role in establishing

sustainable funding, staffing, and infrastructure for initiatives such as the implementation of the practice guide recommendations and through advocacy can increase buy-in from other offices, such as information technology and operations, which is often needed to obtain the necessary resources for continued support. Address resource support early in the strategic planning process to ensure that dedicated and sustainable resources—such as instructional designers to help instructors, ample funding for instructor curriculum development associated with the practice guide technologies, technology trainers for students, and staff with appropriate expertise in the technologies being implemented—are in place. In day-to-day operations, ensure that staff and infrastructure are working effectively to support these technologies and the student learning associated with them.

III. Managing and sustaining institutional change associated with implementing Practice Guide recommendations

Institutional change is the shifting of institutional structures, practices, and processes to support a new outcome or goal—in this case, to support the implementation of the practice guide recommendations to achieve improved student learning through the use of technology.

Administrators can use change management practices to guide this institutional change. The American Society for Quality (n.d.) defines change management as the methods and manners in which an institution describes and implements change, including preparing and supporting employees, establishing the necessary steps for change, and monitoring pre- and post-implementation activities to ensure a successful change process. The previous section of this guide addresses many of these steps; however, managing and sustaining change involve additional considerations for ongoing monitoring and improvement.

The American Society for Quality underscores the importance of including metrics in an implementation plan, and we agree that this inclusion is paramount for successful implementation of the practice guide recommendations. In the planning phase, determine the metrics you will use to evaluate the implementation and for the annual evaluation of this initiative. For example, feedback technologies help instructors assess students' skills and understanding. These technologies provide data that can be used to tailor and modify instruction to better address students' learning. Determine which data can be generated from the feedback technologies you elect to adopt as a part of the practice guide recommendations and decide which data elements will be collected and reviewed annually to measure impact on student learning.

Determine how you will track progress and communicate results over the course of the implementation. Communication is essential to successful change. When considering communication strategies, think about what is being communicated and who is communicating it. One example of a useful communication strategy is the use of project websites to provide information about the project and updates throughout the implementation. Institutions should consider the roles of leaders in communicating the change since they are important communicators of institutional change (Prosci, n.d.-a).

During implementation, periodically evaluate your progress. At a minimum, review and reflect on your implementation progress every semester. Once the practice guide recommendations are implemented, an annual evaluation is recommended. Engage with the steering group annually to reflect on, evaluate, and improve aspects of the practice guide recommendations' adoption and the student learning outcomes associated with them. Use feedback from your institution's instructor professional learning courses as an important source of information about instructor perspectives on the practice guide recommendations. When benchmarks in implementation are met, recognize and celebrate them.

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